

# How to Build a Legacy with Fundraising/Development Activities

Tammy Bray  
(12/9/22)

# Leadership Position

## Dean of College of Public Health and Human Sciences at Oregon State University (2002 – 2017)

### **Academic (Academic Excellence)**

- Vision to build a distinctive college
- Research – collaboration and multidisciplinary approach to get more research fund
- Teaching – recruit high quality of students and faculty
- Students – need scholarships and fellowship to help first generation students
- Services – community and social responsibility

### **Fundraising (Development)**

- I need **MONEY!**
  - To retain and recruit the best faculty (Endowed Directors / Chairs/ Professors)
  - To recruit and best students (Scholarship and Fellowships)
  - Renovated Lab –
  - New Building –

# Where is the money coming from?

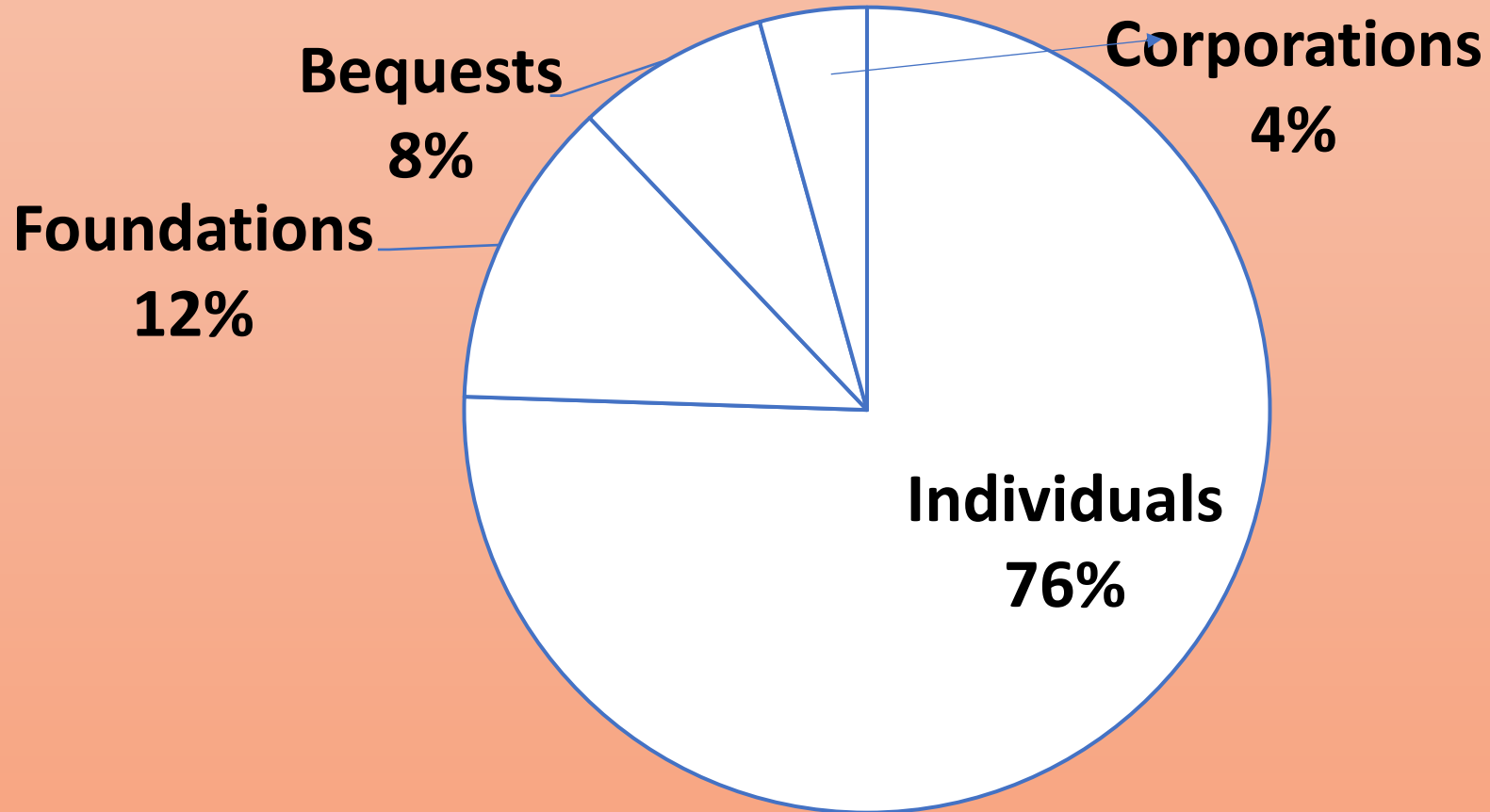
- **State:** State allocation (10-14%)
- **Tuition:** from **# of student** enrolled (70-75%).
- **Indirect Cost of Research Grant and Contract:** from **faculty success** in applying \$\$ from Federal or State agencies or industry
- **Fundraising (Development)** – from alumni and **donors**

# Insight into Philanthropy (慈善事業)

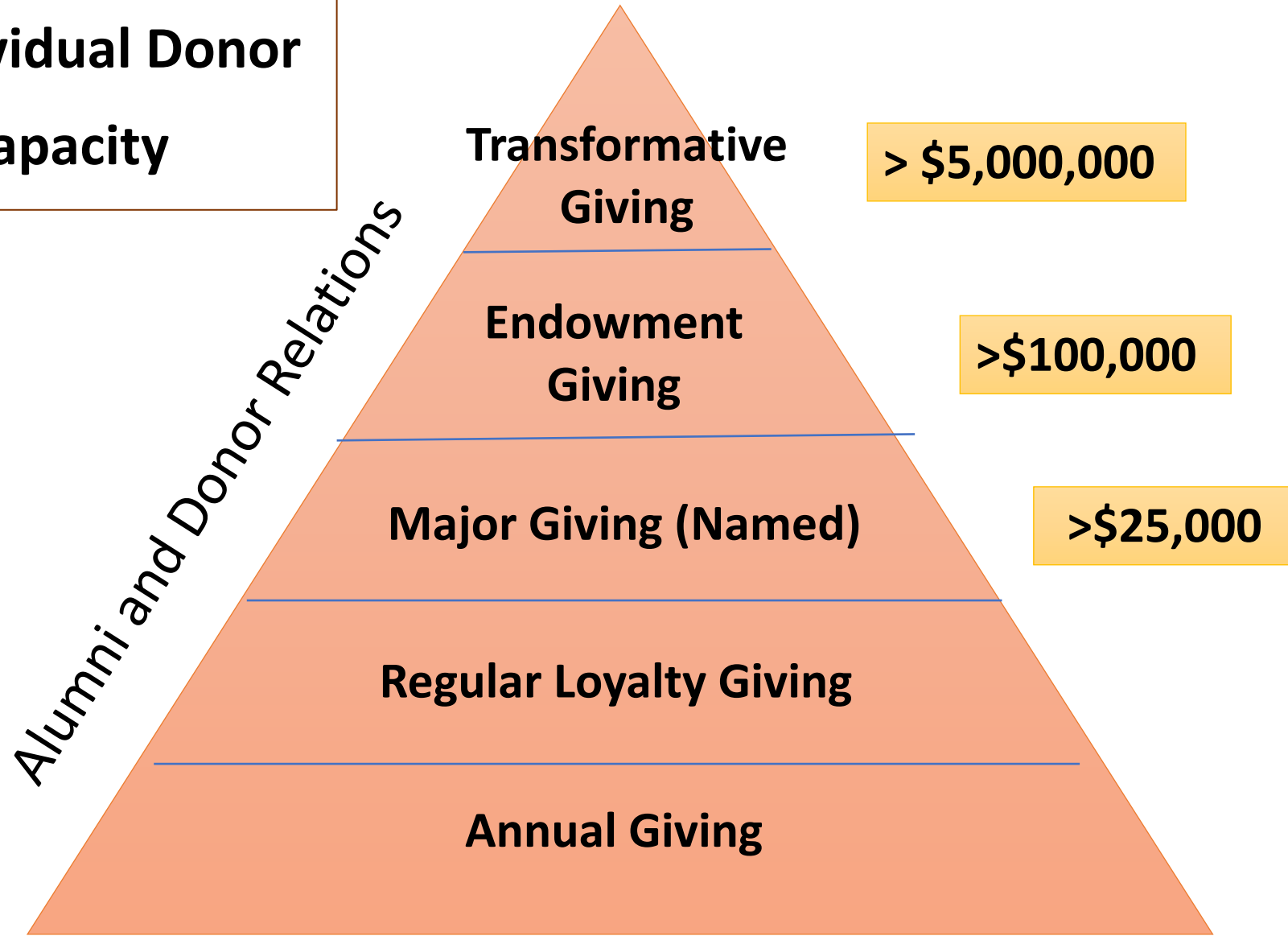
Fundraising (籌款) vs Development (發展)

Who Gives?

# Philanthropic Giving in America (\$295 Billions/year)



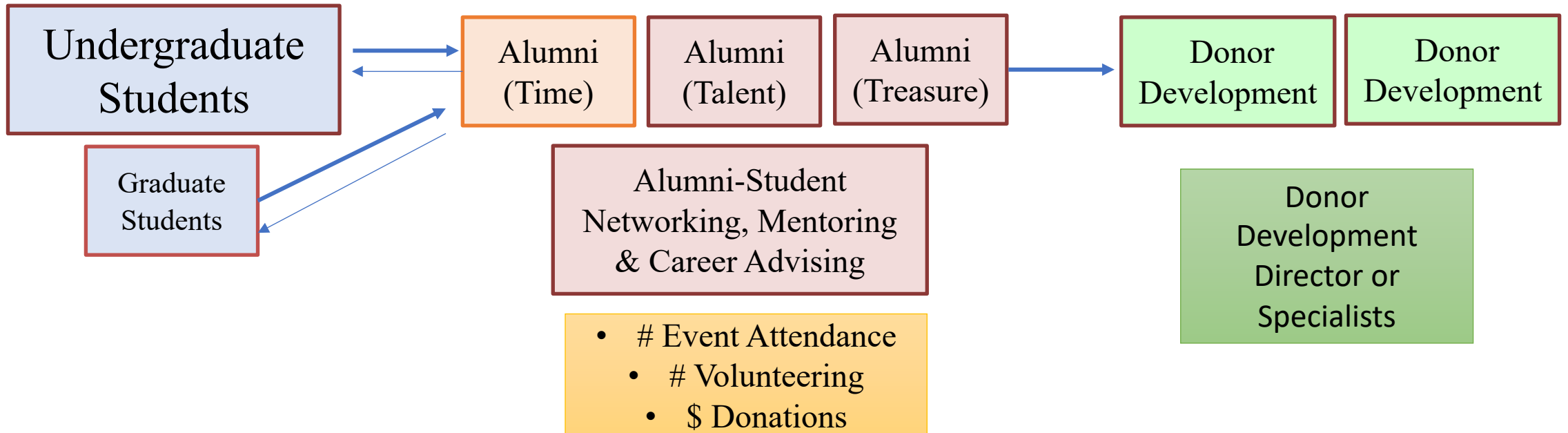
**Levels of Individual Donor  
Giving Capacity**



Most of the donors come from  
successful alumni – they started as  
grateful students

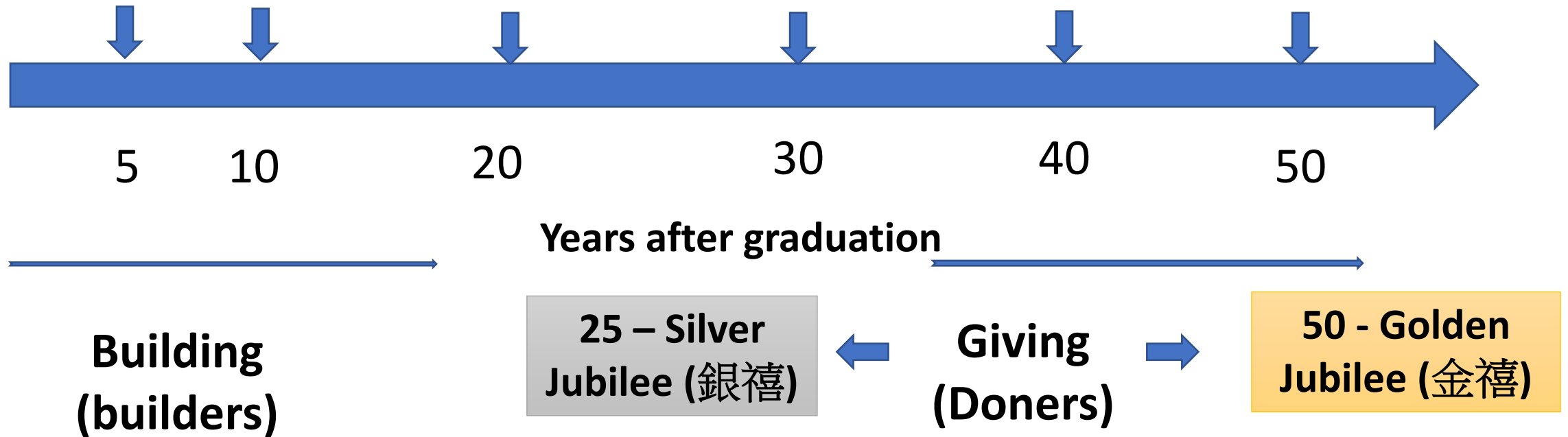


# Alumni Relations & Development



# Alumni Giving Life Span

Various meaningful activities at different stages of their life



The Key Question is  
***“Why Alums/Donors Give?”***

# Alumni Relations vs Donor Relations

## **Alumni Relations**

- Friends making
  - Events/activities (variety)
- Builders
- Loyalty giving (affinity giving)
- It is about paying back

## **Development/Fundraising**

- Money making
- Alignment of vision and passion
- Passion giving
- It is about the donors
- Legacy

# Incentives help for Charity Giving in the USA

- Income tax incentive in the USA –
  - Before 72 yr - US\$ 1,000 = income tax deduction of 30 – 45% (save US\$ 300 – \$450)
  - After 72 yr – non-taxed retirement fund (RMD)
    - \$1,000 – distribute it to yourself – pay tax 30-40% - received \$600-700.
    - \$1,000 – distribute it to charity - \$1,000 (no tax)
- Estate to legacy (not always leave it to the children)
  - In honor of someone (often family, husband, wife, or deceased children..)
  - Impact on society/cause/need..

# Main Reasons for Donors to Give (Academic Excellence ~ Passions)

Compiling  
purpose, vision, passion, need  
and for **Greater Good**

# Re-Packaging (telling inspiring stories)

Convert the University's (Dept, College) Needs  
to Donors Interests

University's  
(or College's)  
Needs



Donors'  
Interests  
or Wish

# Re-Packaging: Convert the University's (dept, college) Needs to Donors Interests

## Theme – Academic Excellence

### University (College) Needs

We need to **reward the faculty** and keep the best in FJU  
- depending on the need, you can use the interest to create a named multidisciplinary research center, enhancement of salary, etc (various policy and procedures)



Gift Agreement

### Donors Interests

To honor your family, father (mother), we can create an endowed Scholar, Professor, or Director in his/her name and put the best of our FJU faculty in that position. This position represents his/her legacy, and last forever.



Example - 1

# OSU Campaign funded 12 Endowed Positions in the College

Endowed Positions	\$ OSU	\$PHHS	Faculty (5y)	Honor, Privileges
Hallie Ford/Director	\$3.0M	\$135K	Settersten	Named/Adm/0.50 FTE/
Moore/Director	\$3.0M	\$135K	Ho	Named/Adm/0.50 FTE/
Leonard/Director*	\$2.0M	\$90K	Aldwin*	Named/Adm/0.25 FTE/\$45K
Knudson/Chair	\$2.8M	\$115K	Krahn*	Named/Adm/0.80 FTE/\$10K
Petersen/Chair	\$1.25M	\$50K	Hooker*	Named/
Rothschilds/Chair	\$2.0M	\$100K	Khanna	Named/Botswana Program
Smith/Professor*	\$0.5M	\$22.5K	McClelland	Named/0.2 FTE/\$5K
Austin/Professor**	\$1.0M	\$22.5K	Hord	Named/0.2 FTE/\$5K
Moore/Professor	\$1.0M	\$45K	Carr	FCH Extension/0.40FTE
Rynerson Cosci /Professor	\$1.0M	\$45K	Maggie Livesay	4H Extension
Aplet /Professor	\$1.0M	\$45K	Drescoll	4H/FCH Extension
IMPACT/Scholar	\$.25M	\$12.5K	Yun	Named Scholar + GRA
<b>Total</b>	<b>\$18.75M</b>	<b>\$817.5K</b>		

**Sunil K. Khanna, PhD** (*he/him/his*)

Professor and **Robert & Sara Rothschild Endowed Chair in Global Health**

Program Director, Global Health

Oregon State University | School of Biological and Population Health Sciences |

College of Public Health and Human Sciences

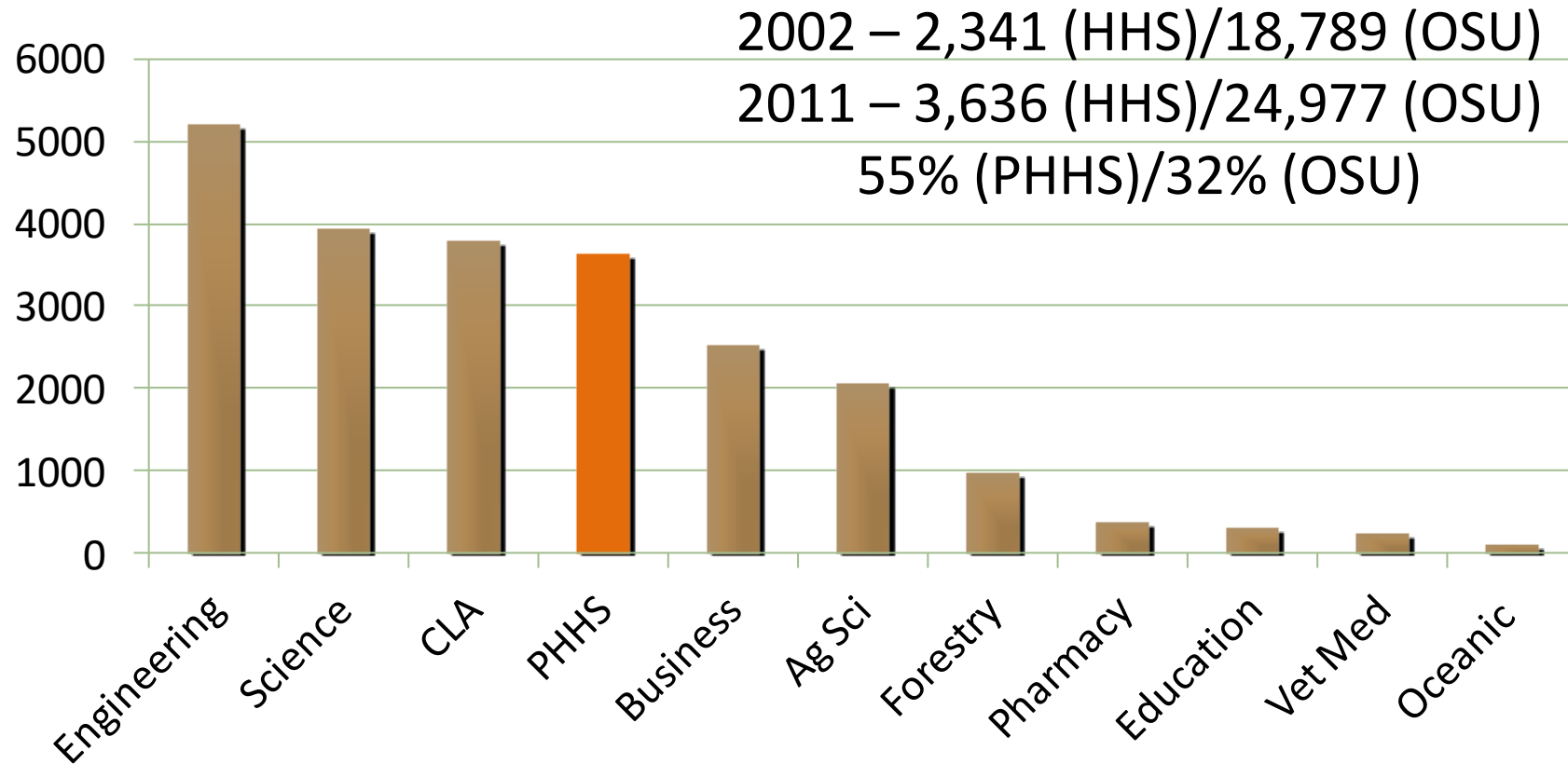
107D Milam Hall | Corvallis, OR 97331 | 541-737-6405

Webpage: <https://health.oregonstate.edu/people/sunil-khanna>

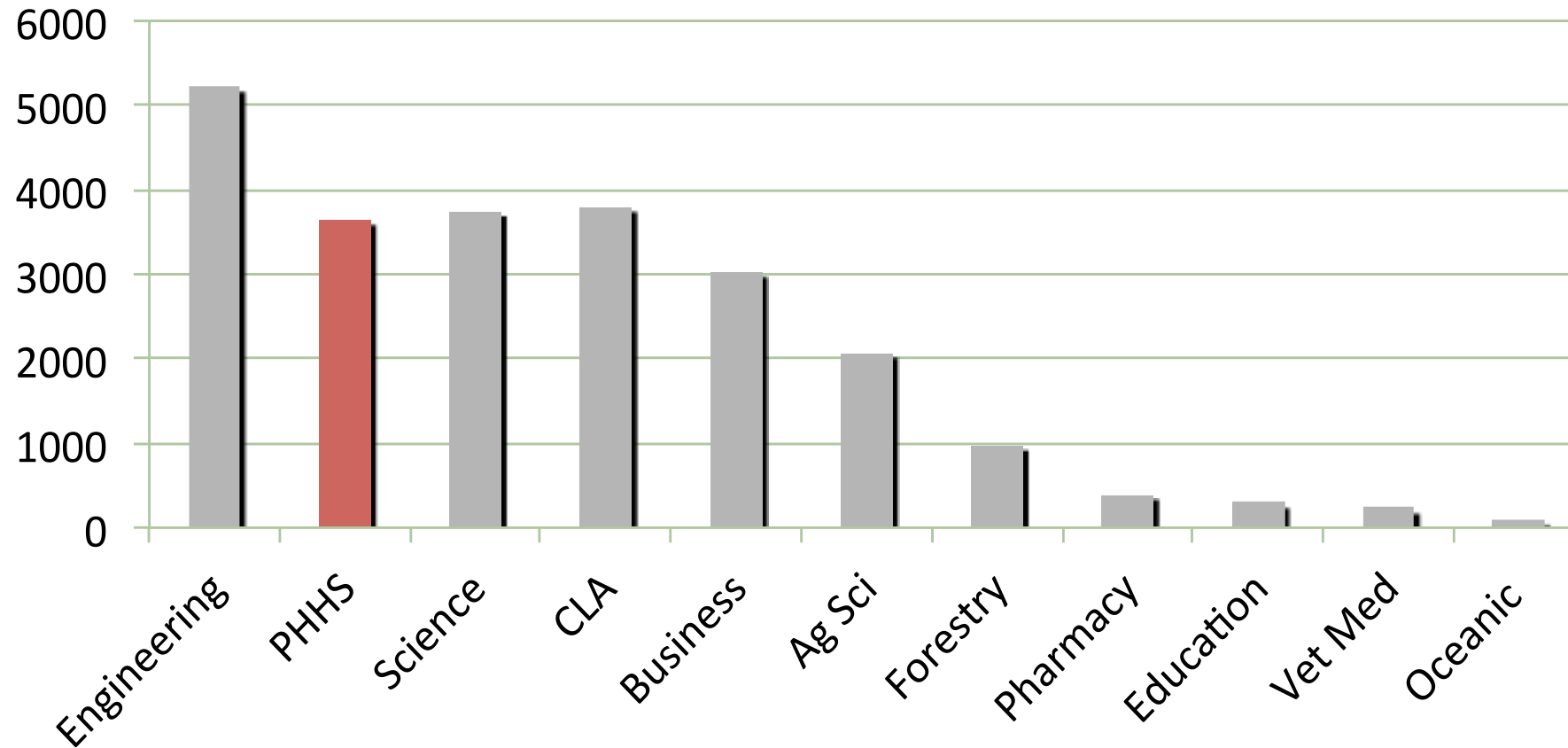
Botswana Global Health Initiative: <https://health.oregonstate.edu/gh/botswana>

*Treasurer and Executive Board Member | Society for Applied Anthropology*

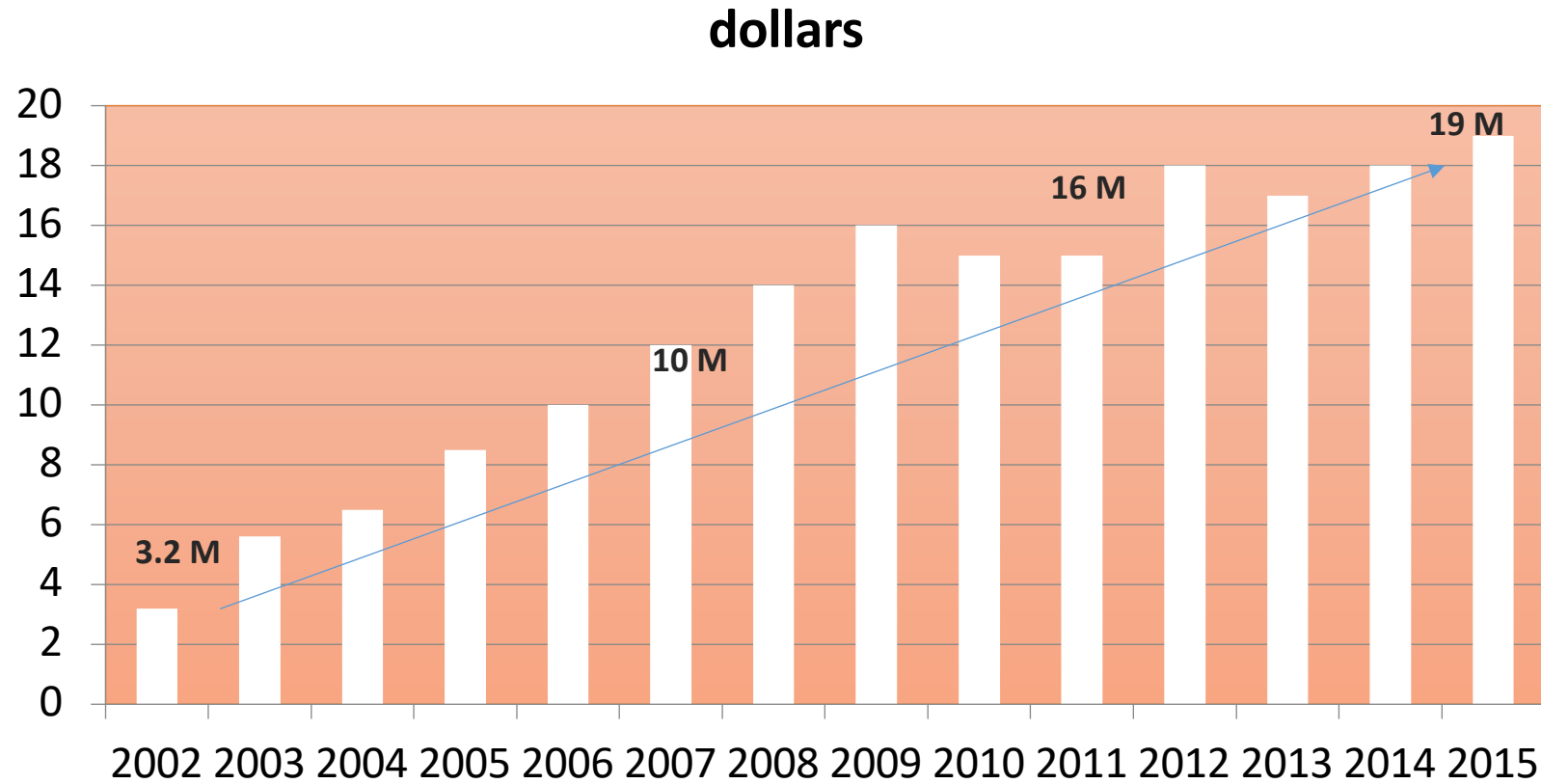
# PHHS student enrollment increased 55%; OSU increased 32% since 2002



# CPHHS is the 'Destination' for High-Achieving Students at OSU



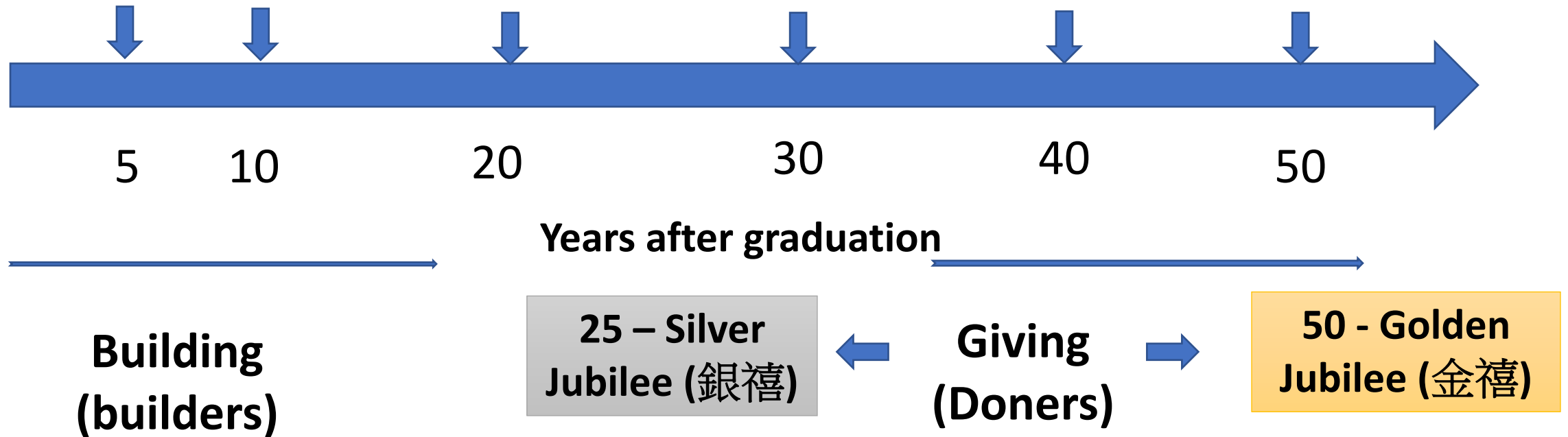
# Total Funding from External Research Grants & Contracts



Where shall I start?  
What is my job?

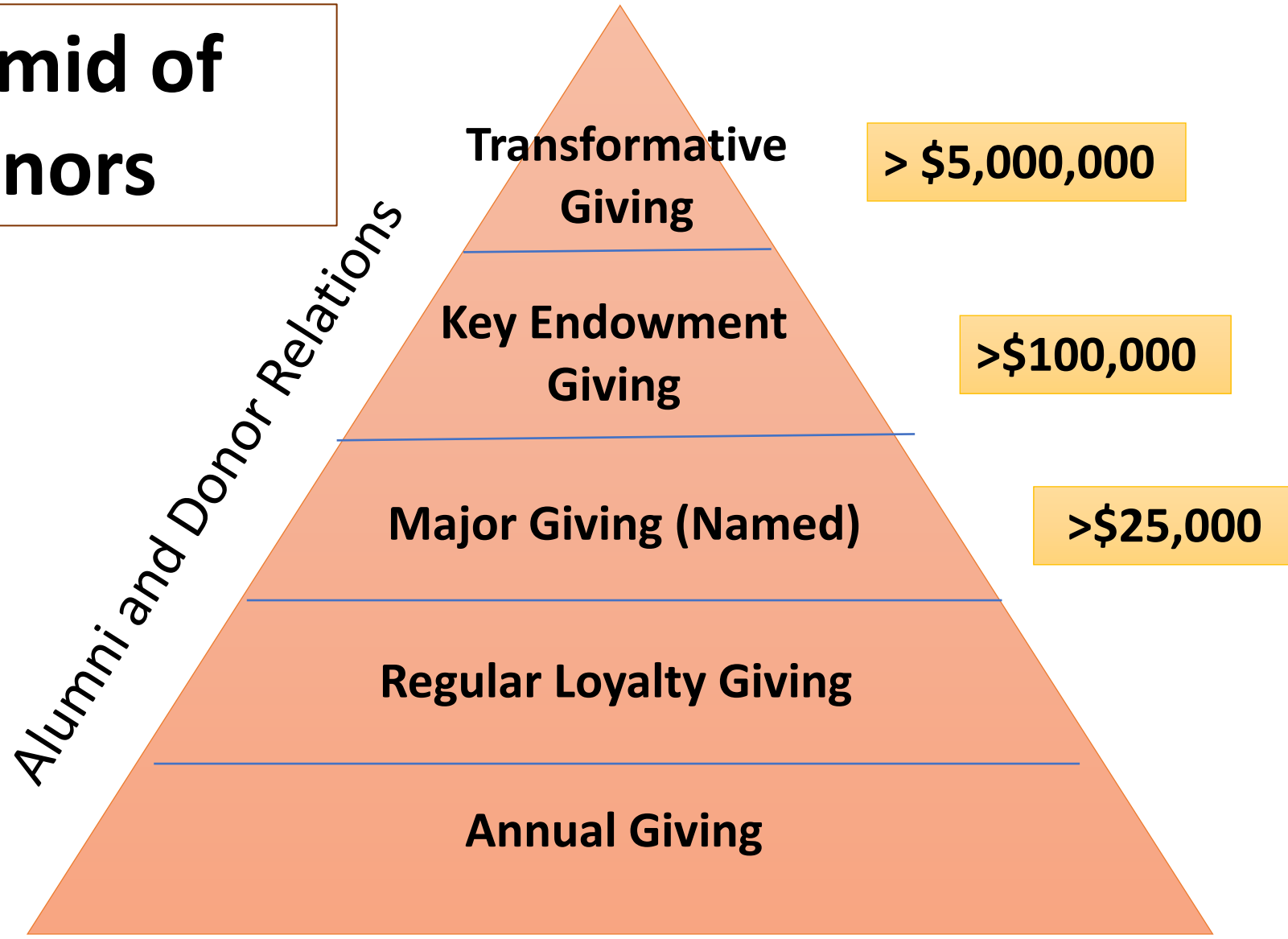
# Alumni Giving Life Span

Various meaningful activities at different stages of their life





# Pyramid of Donors



# Donor Commitment:

Donor's Emotional Commitment to the Mission of the Organization

**Ignorance**

**Awareness**

**Interest**

**Experience**

**Participation**

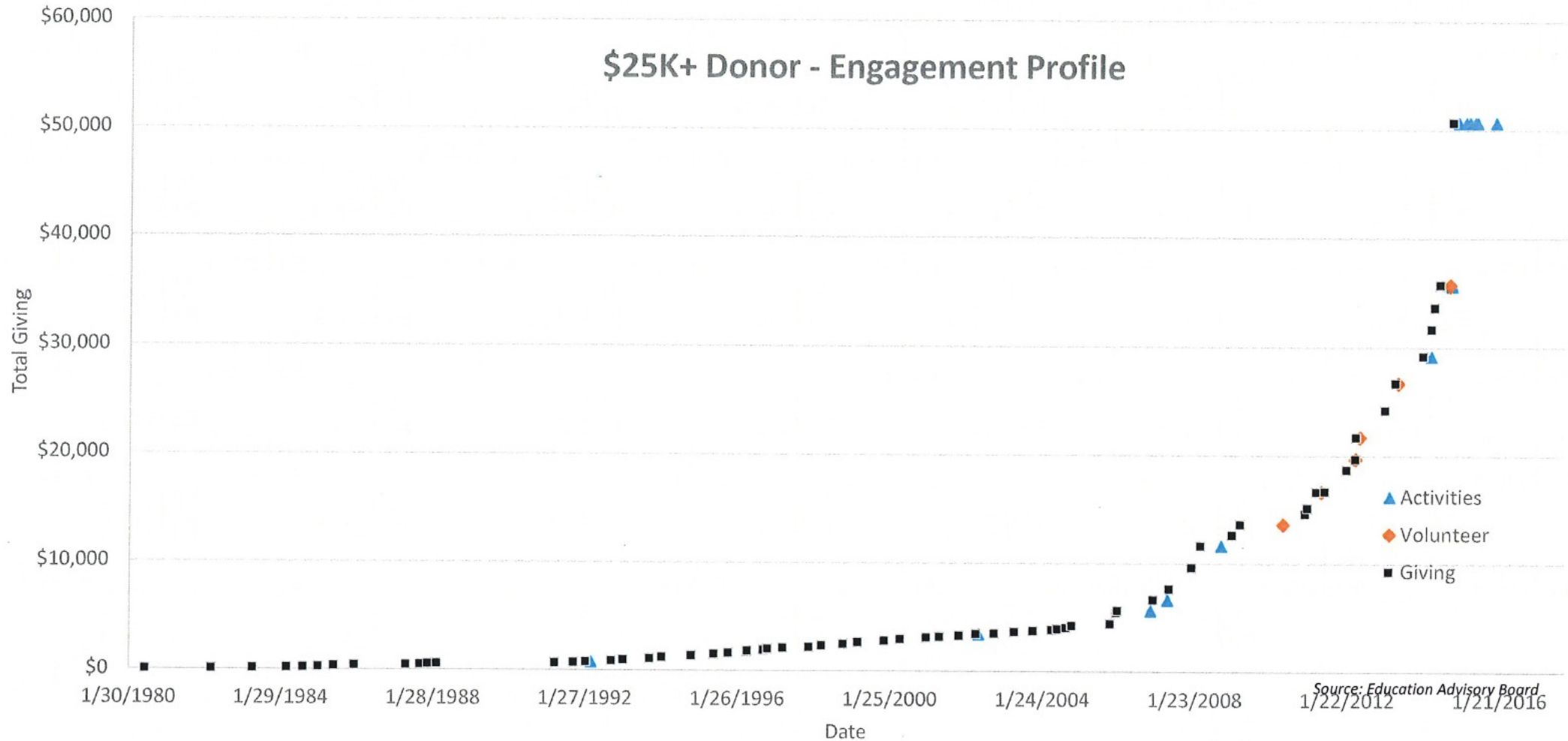
**Ownership**

**Low**

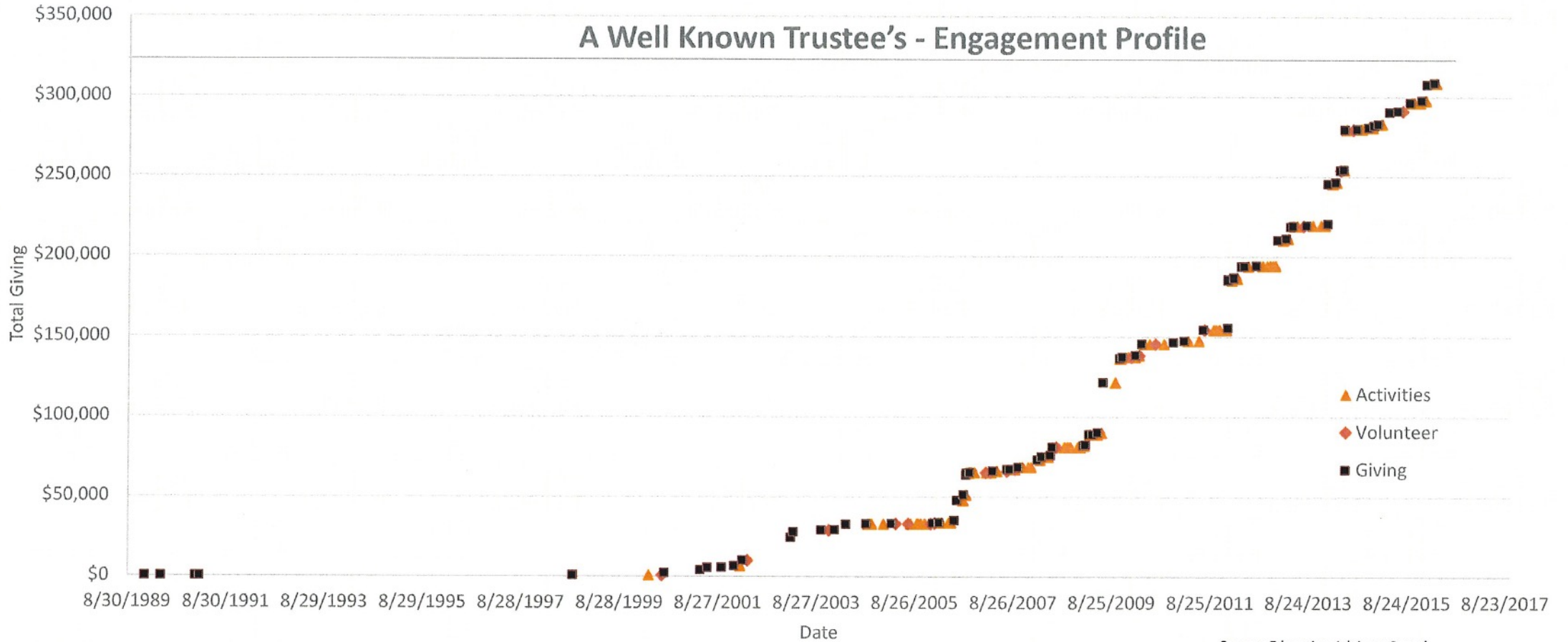
← Donor Commitment Continuum →

**High**

# Engagement Paths

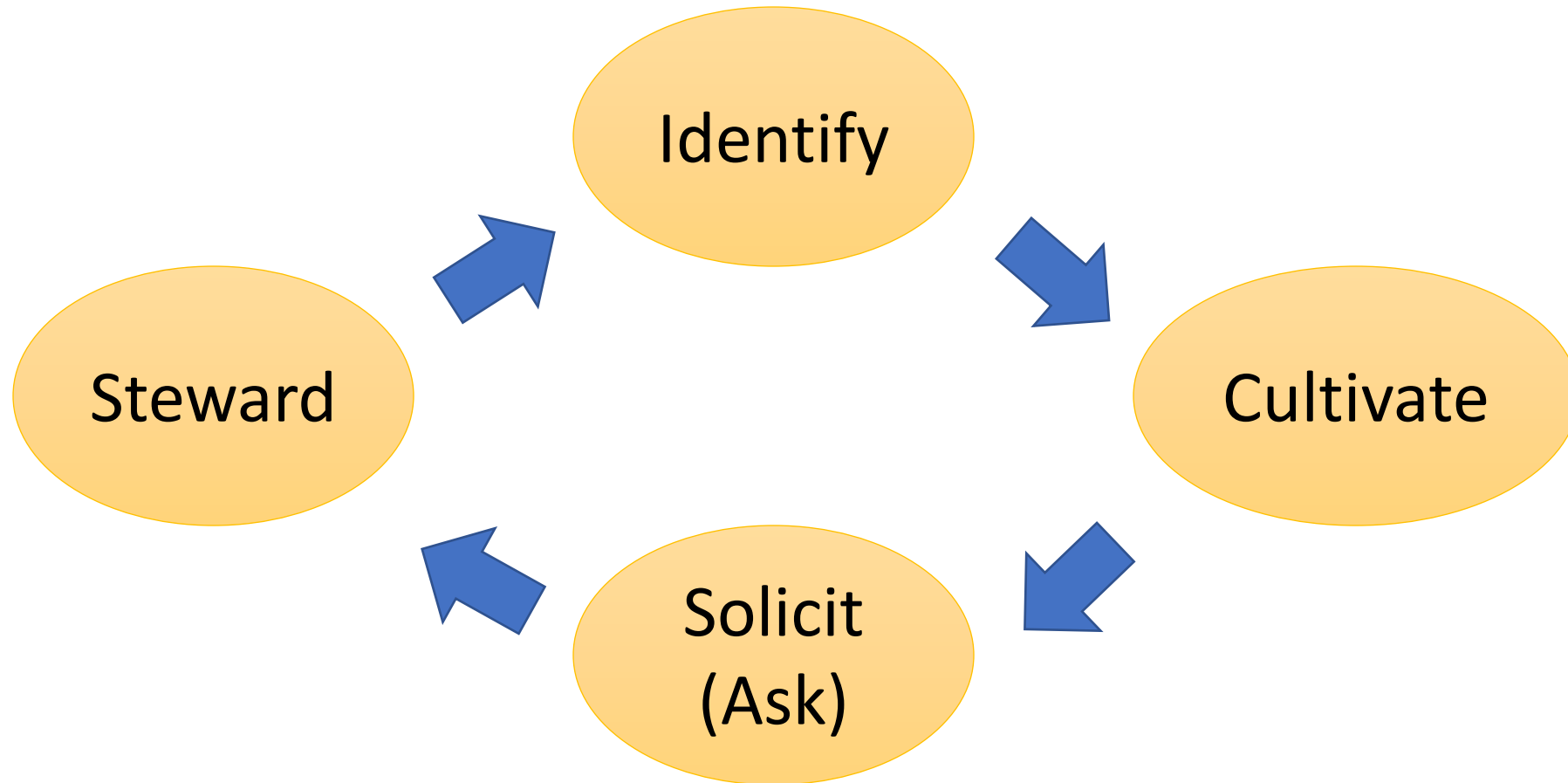


# Engagement Paths



Source: Education Advisory Board

# Development Process and Cycle



# Fundraising/Development Accounts

(Checking  
Account)

Current Use  
or  
Expendable  
Account

(Saving  
Account)

Endowment  
Account  
or  
Interest Use

Comparison of the two accounts

# Functions of the Current Use Account (Checking)

1. **Checking account** – small or large, any amount, collective, accumulative, one project at a time with a beginning and end date or until the money runs out. Can be named. Sometimes, it is flexible.

- Build a building (hospital, Science building).
- Beautify the campus
- Renovate a room
- Name a room in a hospital or building (for equipment or others)
- Scholarship or fellowship until the end of the fund
- Annual Giving – pool small donations collectively – flexible
- College alumni, friends in industries, grateful parents of students, or grateful families of the patients from the hospital

# Functions of the Endowment Account (Saving)

2. **Saving account** – minimum (US\$ 25-50K) or larger amount of principle fund, use only the interest of investment (~4%), forever, perpetuity, usually is named for a specific function as a **legacy**. Not as flexible.

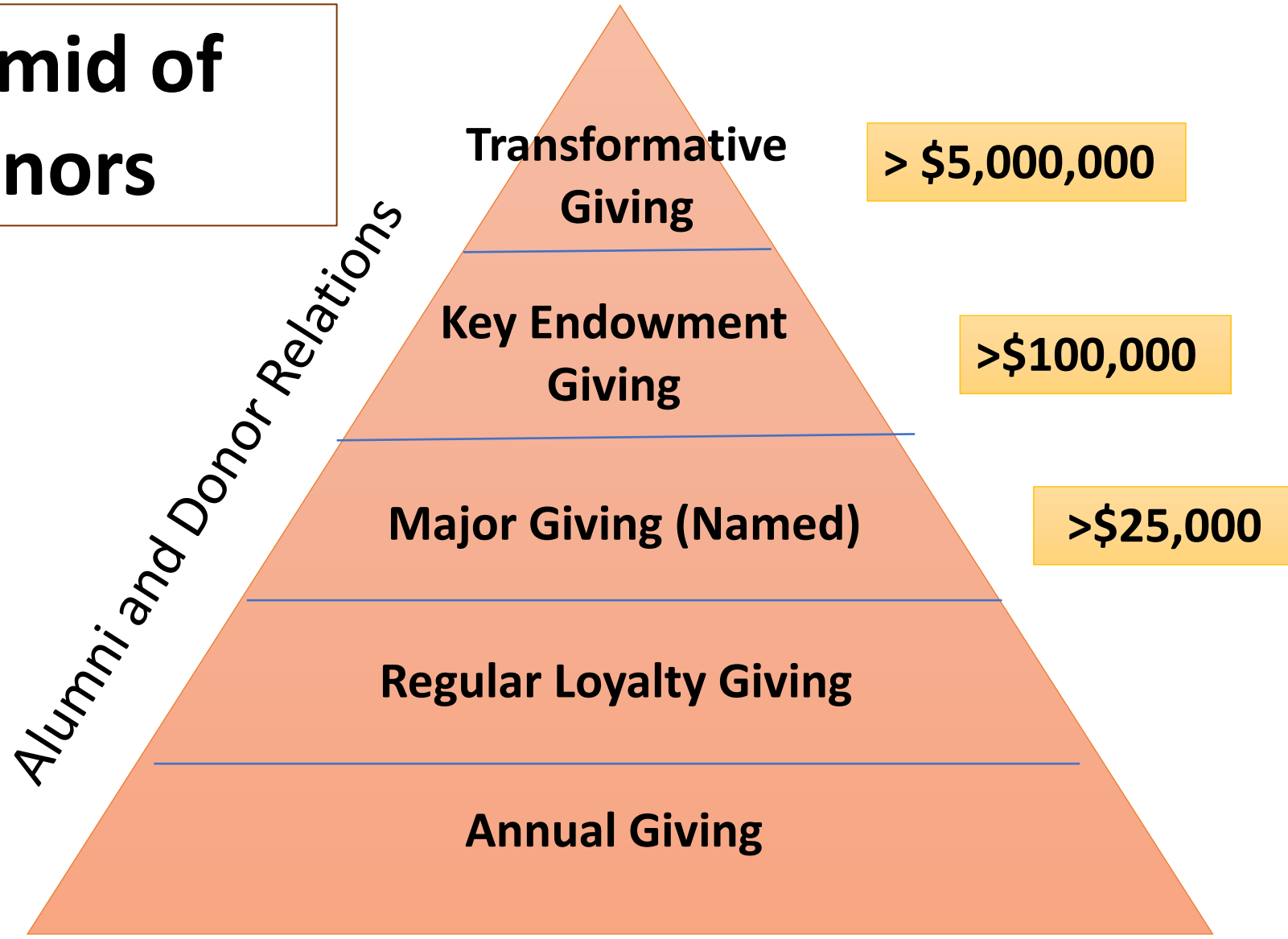
- Scholarship (undergraduate students) – min \$25K = \$1,000/year
- Fellowship (graduate students) - \$250K = \$10,000/year (MS); \$750K = \$30K (PhD)
- Named Endowed Scholar (\$250K) = \$10,000/year (Keep the Best)
- Names Endowed Professor (\$1M) = \$40,000/year – lead small research group
- Named Endowed Chair or Director (\$3M) = \$120K/year – lead large center
- Named Projects – Gifts for experience and growth
  - Speaker Series -
  - Study abroad program
  - Science Fair



# Do the math... Match with donors...

- One time use –
  - Renovate a room to
  - Build a building
- In honor of someone forever... (scholarship)
  - $\$10,000/\text{year} \times 1 \text{ student} = \$10,000/\text{year}$
  - $\$10,000$  is the interest, at 4% interest rate, you need the principle of  $\$250,000$ .
- In honor of someone forever ... (professorship)
  - $\$100,000/\text{year} \times 1 \text{ professor} = \$100,000/\text{year}$
  - $\$100,000$  is the interest, at 4% interest rate, you need the principle of  $\$2,500,000$

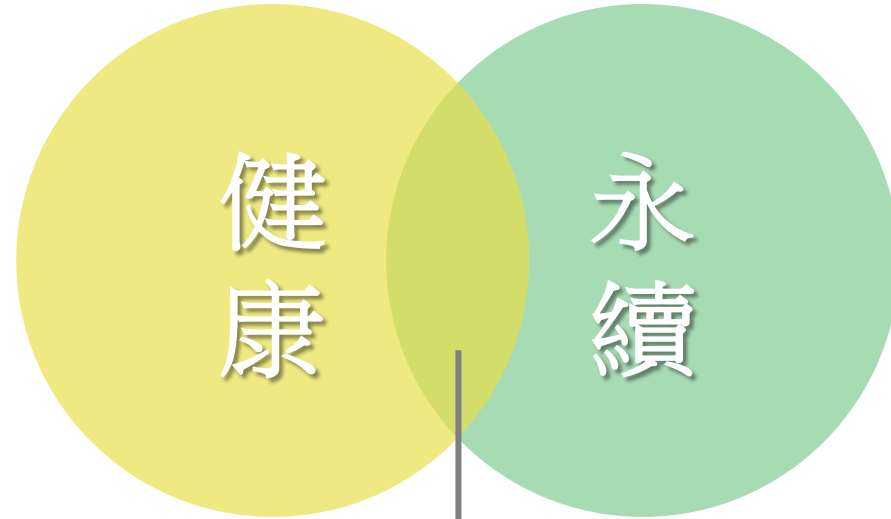
# Pyramid of Donors



Example - 2

# 健康活力 · 永續樂活

- 營養 / 食品
- 家庭關懷
- 休閒旅遊



- 副產品利用 / 保鮮
- 在地休閒活動
- 智慧平台建立

- 幸福學
- 綠色餐旅 (學校 / 社區)
- 副產品之新品開發
- 智慧科技服務

Thank you  
Q/A