

**GENERAL OUTLINE FOR DEVELOPMENT SECTION
OF THE COLLEGE OF BUSINESS MANAGEMENT INSTITUTE (HED 2223)**

-- Joe Johnson

- I. Definition of Development (Fund-Raising or Friend-Raising)
- II. Development in Public and Private Colleges and Universities
- III. Internal Organizational Structure for Development Function
 - A. Role of the Board of Trustees
 - B. Role of the President
 - C. Functional Arrangement of Development, Alumni Affairs, and Public Information
 - D. Role of the Faculty in Development
- IV. External Organizational Structure for Development
 - A. Volunteers
 - B. Fund-Raising Council
 - C. Foundation or no Foundation for Private Gift Funds
- V. Relationship of the Business Office and Development Office
 - A. Fund Management
 - B. Investments
 - C. Accountability
 - D. Trust and Other Gift Endowments
 - E. Relationships with Donors
 - F. Relationship with Donors' Lawyers, Accountants, Insurance Advisors, and Bankers
- VI. Funding of the Institutional Development Program
 - A. Gift Funds
 - B. General Institutional Funds - - State Appropriations, Student Fees, or Endowment Income
 - C. Spend Money to Raise Money
 - D. "A Touch of Class"
- VII. Staffing for Development
 - A. Type of Personnel
 - B. Numbers of Personnel
 - C. Expected Return on Staff Investment
- VIII. Sources of Private Gifts
 - A. Alumni Annual Giving
 - B. Corporations
 - C. Foundations
 - D. Non-Alumni Friends

- IX. Forms of Private Gifts
 - A. Outright, Unrestricted
 - B. Trusts
 - C. Restricted Gifts
 - D. Land and other Real Property
 - E. Estates
 - F. Endowments
 - G. Acceptable and Unacceptable Condition of Gifts

- X. Methods of Solicitation
 - A. Mail
 - B. Telephone
 - C. Personal
 - D. Volunteer Solicitation
 - E. Consultant or Professional Fund-Raiser

- XI. Capital or Special Campaigns
 - A. Use of Consultants
 - B. Special Staffing
 - C. Feasibility Study

- XII. Gift Processing
 - A. Receipt of Gifts
 - B. Use of Lists
 - C. Follow-up with Donors

- XIII. Donor Recognition
 - A. Certificates, Plaques, and other Formal Processes
 - B. Naming of Facilities and Programs for Donors
 - C. Special Gift Club Memberships and Benefits for such
 - D. Personalized Recognition

- XIV. Patterns of Giving
 - A. Growth Potential in Corporate Field
 - B. Steady Growth in Alumni Annual Giving
 - C. Problems with Foundations
 - D. Local Businesses and Corporations
 - E. Deferred Giving and Estate Planning

- XV. Special Problems and Challenges
 - A. Federal and State Tax Laws
 - B. Inflation
 - C. Deflated Stock Market
 - D. Competition for Private Gifts
 - E. Donor Dictation of Program Content
 - F. Lack of Interest in Bricks and Mortar
 - G. Corporate Avoidance of Endowment Gifts
 - H. Investment Concerns – Safety versus Growth

**REFERENCE MATERIALS FOR THE DEVELOPMENT SECTION
OF THE COLLEGE BUSINESS MANAGEMENT INSITUTE**

American College Public Relations Association and American Alumni Council.
Some Aspects of Educational Fund-Raising. Washington D.C. 1961.

American Alumni Council. Fundamental of Educational Fund-Raising.
Washington D.C. 1968.

American Council on Education. College and University Business Administration.
Volume 1. Washington D.C.

Pollard, John A. Fund-Raising for Higher Education. New York, NY. Haper and
Brothers. 1958.

Rowl and Westley, A. Handbook of Institutional Advancement. San Fancisco,
CA. Jossey-Bass Publishers. 1978.

Seymour, Harold J. Designs for Fund-Raising. New York, NY. McGraw-Hill Book
Company. 1966.

Special Note: You can profitably find a wealth of sound articles on
development in the monthly issues of "CASE Currents" which is a
publication of the Council for Advancement and Support of Education.
Copies should be available in your institutional libraries and in your
development, alumni, and public information offices.

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