Capstone Paper

Fundraising and Events in Development and University Relations

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Literature Review

US higher education institutions improved fundraising results overall in 2006, a 9.4 percent or $2.4 billion increase from 2005. That has been the most massive increase from 2000 due to larger-scale donation amounts in a single period. What has not increased is the number of donors. Although donations improved by 18.35 percent, the donors' numbers remained constant or slightly decreased. (Strout, 2007) Philanthropic giving to higher education institutions has fallen each year due to a lack of stewardship. However, there is extensive literature focusing on charitable giving (Andreoni, 2006), only a small amount of the literature has focused on providing higher education. This literature review aims to discuss the essential qualifications that lead to the University's financial gifts related to fundraising and stewardship events in Development and University Relations.

Research researches offer insight into how stewardship efforts can get involved in the sector of advancement and donor support. The Council for Advancement and Support of Education (CASE) defines the field of improvement "as a strategic, integrated method of managing relationships to increase understanding and support among an educational institution's key constituents, including alumni and friends, government policymakers, the media, members of the community and philanthropic entities of all types" (Masterson, 2013, p. 1).

An article posted in the Journal for marketing for Higher Education states that much higher education institutions have invested heavily in technology. That has enabled them to acquire and develop powerful databases that trace the diverse data and individual donors from time to time (Yuksel et al., 2011). While technology does provide efficient information in the search to spot and screen potential donors from different places, the essentiality of capacity to offer and affinity is still questionable.

Development professionals prioritize their efforts and create events and strategies to reach their philanthropic goals. As stated in (Perry et al. 2009), an indicator of capacity to give lies in the influence of income but does not appear to be as strong as one might indicate. Compared to income, wealth is usually more stable. There is a clear indication that giving from charitable activities rises among families' richest (Schervish & Havens, 2003). These facts have resulted in a strong focus by development and university relations professionals to look more at prospective donors' wealth.

To reach the prospective donor, specific demographic variables directly relate to significant giving. The issues that surround the collection of data lie in how. How does an institution confirm that the demographics found are accurate? According to J. Holmes (2009), most researchers go beyond the data collection by incorporating proxies such as significant field of study, occupation, age, and advanced degrees attained, among others.

The importance of stewardship to donors concerning philanthropic giving is well understood. Some argue that building affinity is a procedure (Gallo, 2012), including embracing philanthropic giving. That can be attained through a relationship-building cycle. The cycle starts with affiliation and progresses through relationship, support stages, engagement, and stewardship. According to Mael and Ashforth (1992), organizational identification is perceived oneness with an association; regarding how an individual encounters the successes and failures of the social entity at different times.

The funding the state gives to the institutions of higher learning has been greatly slashed over time. That has forced such institutions as colleges and universities to seek alternative sources of funding, mainly private sector funding (Weerts et al., 2010). As per the annual Voluntary Support of Education survey, overall giving to higher education institutions has declined over the past several years. In the previous year, there was a survey conducted. The survey gave out the lowest donation rate over many years in history (Masterson & Carew, 2010). higher education institutions have an average giving of about ten percent. The majority of those who give back are older and established professionals (Masterson et al., 2010).

In addition to affinity to one's institution and the demographics associated with identifying the donor, some would say that identifying oneself creates a sense of belonging and boosts the individual's emotional status from time to time. Researchers define organizational identification as a relationship with a specific link within a formal group that works together to archive certain specific goals (Bartels, Pruyn, DeJong, & Joustra, 2007). The integration between the organization allows the insinuations to get alternative sources of funding, which assists them in solving the problems of financial constraints due to reduced government funding. In the article, optimizing engagement, Stephenson & Yerger argue that individualized brand identification leads to an institution's affinity. The individual personalizes the success of the groups and the failures as their own. That can positively or negatively impact the individual's self-concept and promote social interaction between the organizations (Bhattacharya, 1995). In addition, the individual will then commit to the realization of organizational goals and, in the end, because of those achievements, will donate.

According to The Journal of Nonprofit and Public Sector Marketing, loyalty is different from affinity to an institution. To the general knowledge, donor loyalty is the critical characteristic in assessing donor funds (Alves et al., 2009). Given the vital role that donors play in supporting institutions of higher education, it is not to a surprise that institutions spend most of their time and resources to an in-depth insight into the most critical factors that influence the donor loyalty as well as the determination of the most appropriate management strategy which they can adopt (Helgesen & Nesset, 2007; Holmes, 2009). The importance of donor loyalty has led to numerous studies each year. Many of these studies have contradictory results. That condition makes it hard for the university administration to get the overall situation or to consider which products are most reliable and applied as the basis for policy decisions and practice (Iskhakova et al., 2017)

As stated above, donations may have various ways of coming through to an institution. Makrez, H.M (2011) says that how a university engages in social media networks will give. She argues a comprehension plan for implementing social media initiatives to attract and thank donors. According to Sutrave, Kruttika: Godasu, Rajesh, and Noteboom, Cherie (2020), conventional means of phone calls, use of direct mailing, and interacting face-to-face are not always possible and cost-effective. Social media usage can help higher education institutions overcome these shortcomings. Increasing donor recognition, engagement, and donation opportunities through social media is a promising avenue by which institutions might enhance their donor base and foster a sense of community and stewardship (Wastyn, 2009).

Monetary giving stands out as the one aspect in which the donors can be engaged. The lack of resources forces higher education institutions to think differently about donor engagement and stewardship (RJ Valentino, 2011). The research found a direct impact on social media networking usage to both giving and volunteerism. Social media networks' trends are valuable tools for connecting donors, recognizing donors, and expanding their network (Coughlan et al., 2012).

These articles have established many reasons why donors give and how organizational identification theory can be helpful in the effort to engage and steward donors. Higher education institutions invest significant resources to develop events, and many receive a large portion of their operating budget from donations and sponsorship.

While charitable giving by donors is an integral part of the institution, it is only one part. Donors of all kinds can be engaged and stewarded by the University on other levels. Development and University Relations professionals can recruit and utilize alumni to establish a connection for the long term. Current research supports donor recognition and giving, as discussed above; however, continued research will help explain the need for donor support and recognition.

This literature review covers the process in which donors are engaged, recognized, measured, and at the end, stewarded for their contributions to institutions of higher education. At the University of Tampa, these processes exist. Using our database, we can easily access donor records to track their lifetime giving, allowing us the information to steward them. This paper will answer the question, how do higher education institutions plan events that foster the institution's mission and maintain equal quality effectively? I will walk through a current event that takes place annually, discuss the problems that occurred and explain whether or not the suggested recommendations worked on a second event.

Over the last 27 years, every first Friday of November has been dedicated to recognizing donors for the year's past contributions. This event invites over 500 donors who gave over the $2500 threshold an evening of wining and dining. These donors are members of the Minaret Society, and this evening is created to honor them and recognize the contributions they have made to the University. Minaret Society Dinner is hosted by the president and first lady of the University of Tampa each year and takes ten to twelve months to plan.

The planning of the Minaret dinner begins in the spring with meetings between the office of development and the president's office. The first step to the plan is establishing a theme that ties back to the University. Choosing a theme can be the longest part of the planning. Finding a message that speaks to the University's mission and current state can be challenging. Once the theme is established, the collateral pieces will follow. This part consists of working with the University's public information office to ensure that all university branding guidelines are in place.

The second step in planning this evening is working with various vendors to book services for the evening. This is where the bulk of problems in the event planning process can occur. When working with multiple vendors, communication is critical on and off-campus. Communicating your needs for your event is an essential part of planning any paramount stewardship or fundraising event. When discussing Minaret Dinner, communication is a multi-level process. It begins with the Vaughn's and their vision for the evening. That vision must be communicated to your vendors thoroughly to ensure perfect delivery.

Facilities in the area of greatest need when discussing the event and its details. Plans for table layouts start in the summer, and by the beginning of the fall semester, the landscape for each room is created and decided on. This year, outsourcing the tables was done to ensure that the layouts were done according to the vision of the first lady and president. Tables were delivered a week before the event, and the diagrams were given to our facilities management department. With this particular event, the process was not followed. Due to covid and the shortage of staffing, the facilities department at The University of Tampa, where the event was held, had to hire temporary employees. These employees had little time to be trained; therefore, the delivery of the room scaping was not up to par.

Multiple meetings were held to discuss the lack of setup and the staff shortage to prepare the room adequately. On the event day, tables were still being adjusted, and seating was being rearranged. The piano that is typically in the center of the room was brought to the corner of the room. Directions and diagrams were not followed, and hours before the event, the piano had to be moved to the center and returned by an outside vendor at the last moment.

Logistics are the glue to an event; when one detail is off, I can entirely affect the event's outcome. The Minaret Society Dinner event is the largest most attended event that The University of Tampa hosts each year. There is no room for error when it comes to the day of the event. The evening went as planned, but many obstacles came when dealing with our facilities team and setting up the multiple rooms. Communication was weak between upper leadership and the setup team. It felt cluttered and disorganized throughout the evening.

It is evident that a debrief for this event was necessary, and questions needed to be asked about how improvements could be made. During this meeting between the event planner, the first lady of the University, vice president of development, and the director of stewardship, one question was asked. "What would you do differently before the next event?" Many suggestions were given between the group, but the key takeaway was organization and communication efforts needed to be tightened. The next major event would be The Board of Trustees Holiday party. There were exactly six weeks to make changes and gear up for the next event.

In Appendix A, you will see that an event briefing template was created as a running document outlining all the event logistics. This can be used for all occasions and shared with all on-campus and off-campus vendors before any event. It's a great way to keep communication consistent and logistics organized. This was used for the Trustee holiday party as a test and was well-received by all vendors and campus partners. It's also a great way to communicate event details to upper leadership and speakers presenting at the event.

In Appendix B, you will find the event playbook. This book is utilized as a plug-and-play. Anyone person planning can use this to document detailed information. Event planners can add sections as necessary and feel free to reorganize sections to make sense to them and their events. The sections included in the playbook are specific to planning events at The University of Tampa. You can find helpful UT Event planning tips and contacts at the end of this playbook. This playbook is a great way to track information, especially for yearly events.

Both documents were used for the planning of the Trustee holiday party. Having these documents proved to be a great solution to the problem at the Minaret Society Dinner. Room layouts were included in the briefing and provided to facilities weeks in advance. A day before the zoom call to go over the briefing was helpful and allowed for clearer communication giving facilities management the exact information needed to get the temporary employees to step-by-step instructions for setting up the venue.

It was proven that supplying communication pieces to facilities is key to having a successful event. As mentioned in the literature review above, the organizational identification theory can be helpful in the effort to engage and steward donors. To maintain the identity of the organization, communication is necessary. Donors who are stewarded at these events look at the event from many angles. Logistics are an accurate indicator of the efficiency level of planning and executing these events.

Many more pieces can be created to continue to improve events. Technology can play a more significant part in executing events with proper databases and web-based systems that can help make the planning process more seamless. To maintain consistency in their events, the university could adapt their constituent database to feed into the room reservation database, ad Astra. This joint system could help streamline the process of event planning on campus and allow for efficient planning and execution of events.

While donor events are the main form of stewarding donors and maintaining donor engagement, communication is the key to ensuring that both are done effectively while staying consistent with the university's mission. Volunteer engagement relies heavily on these events, and it's up to the Development and University Relations department to make sure they are planned strategically and to the best representation of the university, while bringing attention to the donors and value they bring to the institution. Continuous improvements in technology and communication will only enhance events at higher education institutions and allow for more streamlined processes proving them to be more effective and efficient.

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Appendix A

THE UNIVERSITY OF TAMPA®

Event Briefing:

Event:

Event Lead:

2nd Point of Contact:

Date:

Time:

Location:

Attendees:

Parking:

Volunteers:

Catering:

Media Services:

Layout and check-in:

Photography:

Program:

Appendix B

The University Of

TAMPA

Event Name Playbook

Last Updated – Date

Note to user: This is YOUR playbook; add sections as necessary and feel free to reorganize sections in a way that makes sense to you and your event. The sections included are the basics of hosting a successful event at UT. You will find useful UT Event planning tips and contacts at the end of this playbook. If this is an event that will likely be replicated, be sure to be as detailed as possible, it will make planning in the future much easier.

Event at a Glance

Event:

Date:

Time:

Location:

Anticipated Attendance:

Event Overview

Put a brief description of your event here. Not only will it keep everyone focused on the end goal, but it will help provide the context of the event for future reference.

Table of Contents

Event Timeline

Summarized version of what is happening, when, and where. Think of this as the glance version, a more detailed plan will fall under volunteer assignments.

Sample

8:00 AM – Arrival/Set-Up

8:30 AM– Guests Arrive

10:00 AM – Event End

Event Layout

Add it below if you have an electronic layout or picture of the event space and how things will be organized.

Pack List & Setup

List out everything that you need at the event and the quantity needed. It is a good idea to sort materials by the part of the event associated with. Start with the venue's entrance, inside the venue, check-in, etc.

Sample

Check-In

- RSVP lists (at least one per check-in table)
- Name tags
- Blank tame tags
- Pens
- Sharpies

Volunteer Assignments

Your volunteers are anyone that will be working the event. When planning volunteer assignments, include every aspect of the event: what is happening, where, when, who is involved, and what exactly people are doing. Remember that your volunteers may not have been as involved in the planning, so it is essential to make this detailed enough that someone with no prior knowledge of the event can follow along and help execute.

One good way to organize this is by making headings for each block of time from your event timeline and tasks during that timeframe. Under these headings, you can list the volunteers assigned to that task and bullet any specific jobs the volunteers need to do.

Sample

8:00 AM – SET UP

Check-In

Volunteer 1, Volunteer 2

- Organize name tags
- Set out RSVP lists with pens

Catering

Volunteer 3

- Meet caterer, direct to their set up location
- Make sure they have everything they need

10:00 AM – END OF EVENT

Tear Down

Volunteer 1, 2, 3

- Pack up check-in
- Collect guest name tags

Vendor Contacts

List all of the vendors you are working with and a contact for each.

Sample

Company Name

Service Provided

Contact: * name * | Phone: * number *

Communications

Add any mass event communications here; these may include sponsor solicitation letters, event invitations, event reminders, emails to volunteers listing their duties, etc. Keeping records of these communications will save time for repeating the event in the future.

Volunteers

When informing volunteers of their tasks before the event, consider listing the volunteers and their respective duties. This layout will allow each volunteer to find their name and overview their responsibilities. From here, they will be able to follow the volunteer timeline. Ways to do this include email or an in-person meeting with your volunteers. Doing this will also allow volunteers to address any questions they may have before the event date.

Sample

Volunteer 1 – Check-in set up, tear down

Volunteer 2- Check-in set up, tear down

Volunteer 3- Catering, tear down

Reminders

You will likely send multiple event reminders; one week out and the day before are good places to start for electronic communications.

UT Event Planning

Campus Event Spaces and Contacts

Space	**Contact Name**	**Contact information**
Falk Theatre	Alex Aamyot	aamyot@ut.edu
Residence Halls	Elena Franqui	efranqui@ut.edu
Vaughn Center	OSLE	eventservices@ut.edu
9th Floor Vaughn Center	Brooke Venturo	Bventuro@ut.edu
Sykes College of Business	Jessica Diefenderfer	jdiefenderfer@ut.edu
Macdonald – Kelce Library	Marlyn Pethe	mpethe@ut.edu
Athletics	Larry Marfise	lmarfise@ut.edu
Athletics	Jerome Fulton	jfulton@ut.edu
ICB Conference Room	Natasha Pike	npike@ut.edu

ICB BBVA and Patio	Jacqueline Bishop	jabishop@ut.edu
Scarfone and Hartley Gallery	Dorothy Cowden	dcowden@ut.edu
Southard Family Building Multipurpose Room	Matt Battista	Mbatista@ut.edu

Event spaces that cannot be reserved are listed below.

- Chiseler's Conference Room (PH CHIS)
- Computer labs (non-classroom)
- Delo Park (DP)
- Plant Hall 248, 321, 340, and 345

On campus resources

Catering- catering@ut.edu

- Outside food vendors must be approved two weeks in advance by Sodexo Dining Services.

Media Services – If your event requires media services (i.e., microphone, projector, screen, etc.), there is a form available HERE to be submitted at least 14 days in advance of your event. Please note that to complete this form, you will need to have your location booked by facilities and provide the room booking confirmation.

Facilities – If a particular setup is needed for your event or meeting (i.e., additional tables, chairs, trash cans, power boxes, etc.), please send all information, including a layout diagram, to faciltiesrentals@ut.edu or use the online form HERE.

- Matt Wynn Mwynn@ut.edu