Help Sheet:  
Contributing to Advancement and a Culture of Philanthropy

The College’s Advancement Team aims to help alumni and friends connect with the University of Montana and the College of Humanities and Sciences (H&S) in meaningful ways that support the mission of the College. The team assists Department Chairs and Faculty in integrating departmental priorities into H&S advancement efforts and in navigating UM Foundation (UMF) policies and practices.

H&S Advancement Activities:

- Support the College’s Annual Giving program including direct mail and phonathon efforts.
- Develop and implement strategies to secure Principal ($1M+) and Major ($25,000+) Gifts.
- In partnership with the UMF Office of Gift Planning, secure Planned Gifts for the College.
- With Dean and Departments, provide the highest level of Stewardship to all College donors and friends.
- Manage the H&S Advisory Board of alumni, donors and friends.
- Assist with Proposals to corporations and private/family foundations.
- Collaborate with H&S administration on philanthropy-related Communications and Special Events.

Specific Advancement Team Responsibilities:

- Identify, cultivate, solicit and steward major gift prospects.
- Manage a portfolio of approximately 100 current and prospective major gift donors.
- Travel nationally 4-6 days/month to make approximately 120-140 personal visits annually.
- Craft and deliver a minimum of 20-30 proposals/solicitations for principal and major gifts.
- Serve as primary UMF point of contact for H&S faculty and staff, serving all Departments and Programs.

What Faculty can do to advance philanthropy in their units:

- Define departmental fundraising priorities with the Dean and share with the Advancement Team.
- Coordinate significant alumni and donor contacts with H&S Advancement Team and participate in strategy sessions with team as key donor contacts are planned.
- Identify ways in which to connect donors to faculty and students who benefit from their gifts (i.e. introductions to scholarship or award recipients; pictures and description of impact of any capital purchases or renovations; recognition in department newsletter; etc.).
- Share interesting departmental news with Dean’s Office and the Advancement Team and respond to inquiries or requests from the team on departmental news or events to share with prospective supporters.
- Engage alumni in departmental activities through newsletters; invitations to campus and departmental events (i.e. open house, awards programs, etc.); or other communications highlighting special departmental news.

College of Humanities and Sciences Advancement Team – Liberal Arts Building, Room 138C

Marci Bozeman                      Bitty Balducci
Senior Director of Development    Assistant Director of Development
Marci.Bozeman@mso.umt.edu          Bitty.Balducci@mso.umt.edu
Campus Phone: x2646               Campus Phone: x2568
Cell Phone: 406.396.0552          Cell Phone: 406.546.2717

Revised 8.31.2015
Common Q and A’s about the UM Foundation

Q: How does the H&S Advancement Team seek funds for programs, departments and priorities?

A: The Advancement Team aims to build a culture of philanthropy in which funds are raised based on donor passions and interests. The more information Development Officers (DO’s) have about important H&S projects and programs and the exciting work of faculty and students, the better able they are to connect donors to your department priorities. Development Officers work with alumni from across the country to fund scholarships, capital projects, programmatic funds, etc. for your department based on their philanthropic interests.

Q: Do faculty members need to contact the Advancement Team when they learn about major gift prospects?

A: Your knowledge of major gift prospects is essential in building the College’s base of support. Communication and coordination is essential, however, as the Advancement Team and Foundation may also be in contact with the prospect you have identified. If faculty makes the Advancement Team aware of someone who could be a major gift prospect for the department, the team can help support and guide the strategy for securing support as needed or requested.

Q: Can donors give to departments directly?

A: No. University policy requires that all gifts and contributions be directed to the Foundation. The Foundation is a 501(c)3 organization, allowing contributions to qualify as charitable deductions for tax purposes. In addition to providing tax benefits, the Foundation helps ensure that donors are being stewarded and helps increase giving to the departments in the future.

Q: Is it true that the Foundation takes fees out of the gifts made to departments?

A: Yes. The Foundation takes a small fee based on the type of contribution (fees currently range from 2.25-6%). At present, a one-time 6% Development Fee is charged on non-scholarship, non-endowment contributions and a 10% Development Fee is charged on all bequests.

Fees enable the Foundation to support the following services for the University:
- Maintain over 1,900 distinct funds.
- Build and maintain relationships with donors and prospective donors.
- Process the collection of all gifts (cash, check, credit card and stock) and receipt all donations.
- Report on all receipts and disbursements to academic units.
- Process gifts and vet disbursement requests against criteria established by donors.
- Steward donors via acknowledgements, special events and communications.
- Send endowment and scholarship reports to donors with an accounting of fund activity in each fiscal year.
- Provide targeted research to assist units with relationship building.