

UNIVERSITY OF MASSACHUSETTS AT AMHERST
OFFICE OF THE FACULTY SENATE

From the 638th meeting of the Faculty Senate held on February 24, 2005.

PRESENTATION BY JOSEPH BARTOLOMEO, CHAIR, UNIVERSITY ADVANCEMENT COUNCIL
WITH AN INTRODUCTION BY CHANCELLOR JOHN V. LOMBARDI
“FACULTY PARTICIPATION IN THE CAPITAL CAMPAIGN”

Joe is going to make a presentation on what the Faculty Senate’s [University Advancement Council] has been doing in working with our development program as we begin to ramp up for this campaign process. That committee has been extremely active and engaged in every aspect of the process. They have met with our Foundation Board; separately they have met with members of our Development Office, and as you know, they have put up a web site. They have a web site where all the information about the campaign that they think is very important for the faculty to see is up on that site. Presented there is the priority structure, organization and the plan for the campaign—each of the stages that it is going to go through, what the ramp-up looks like, what the structure of the priority list is, how it was made, and so forth.

Now the only part of this that is at all complicated is some confusion that emerges from time to time about the difference between a campaign priority and an academic priority. There is some confusion there because people imagine that the campaign priority is how much money we are actually going to get for what purpose. But, actually, that is not what it is. It is a wish list of all the important things we hope we are able to get money for, if we are able to do so. The campaign priority list is the things that each college and department have determined are their highest priorities to seek in this campaign. They are divided up as pretty broad categories: things like endowments for professorships and endowed chairs, endowments for scholarships and fellowships, endowments for programs, capital activities, and current funds for various sorts of other activities. Each department and college presented a list to the Provost that involved something in the order of \$1.7 billion. This slightly exceeded our anticipated yield from the campaign, so what we did was go through and adjusted the dollar targets for each of our colleges to come out to a total that is within the range we are working with at the moment, which is somewhere in the neighborhood of \$350 million. We do not know for sure how much that is until the study gets done and tells us what our target ought to be, but that is our working total.

The way that we arrived at the total was that we distributed the priorities based on the prior fundraising totals of each of the colleges just to get a rough estimate. What people do not fully recognize is that the campaign totals are targets to be exceeded. This is the key concept of a campaign. So if your college has a total of \$35 million, the goal is for you to actually get \$50 million. And if you get \$100 million, everyone will celebrate and cheer. So the target is the bottom expectation of achievement for each of the colleges, not a limit on the achievement of each of the colleges.

And with that introduction, I now turn the presentation over to Joe Bartolomeo.

The first point that I would like to make—that is certainly highlighted in the Chancellor’s letter that heads the campaign site—is that the Advancement Council did collaborate with the whole process in two ways. First, we suggested the methods of communication in a meeting with the Chancellor. That consisted primarily, up to now, of the material posted to the web site and faculty response. I do not know how much has been received so far. What I heard last week is that response has been modest so far. That is understandable in light of the fact that we are just beginning the process. The second part of the faculty response was that we originally intended to have individual college meetings, but we discussed this at our meeting on Friday and felt that the relatively light response so far suggested that this might not be the most opportune or useful time in which to do that. Instead, we are looking at doing that down the line a year or two, when the campaign is in a more active phase and when some of these priorities that the Chancellor was talking about are a little bit more concrete. This certainly does not mean that faculty members should not be consulting with their deans or directors or whatever about the priorities that have been determined, just as we have the opportunity to respond to the Chancellor in writing as well.

If you have not seen it yet, this is the cover page of the site (www.umass.edu/campaign) and, as you can see, there is a series of links on the side. The second paragraph, as I mentioned earlier, describes the role of the Advancement Council in working this process out. What I want now is for you to turn your attention to the Q & A section. That addresses the goals of the campaign. I wanted to focus on a couple of particular questions because these have come up from faculty members to whom I have spoken. The first is that these priorities are preliminary priorities and that many of the actual initiatives will be in response to the wishes and desires of donors. I think the question about if a donor wants to fund an initiative that is not a priority is a particularly important question that faculty have asked to this point. I think the answer spells it out very clearly that if this desire on the part of the donor is something that the University can do and if it fits in with our mission, then it is certainly something that would be accepted. If, on the other hand, it were a race horse or something like that, I suspect we might have to think about that kind of request.

The other thing that I would like to bring to your attention is the question about the faculty role in the campaign. I think it is spelled out pretty clearly here that we are the generators—along with the students—of the product, so to speak, and that we may be asked later on in the campaign to tell and show people what we actually do here to engage their support down the line. The last thing that I wanted to draw your attention to is the components of the campaign. In particular, this is the kind of percentage breakdown of the preliminary goals. As you can see, 22% would go to professorships, 18% for programmatic initiatives, 10% for student activities and scholarships, and 50% for academic capital investment: buildings, infrastructure, etc. The grand total comes to a little over \$350 million. The other point I wanted to make is about the distribution between current use and endowment. As it is planned right now, \$216 million of the \$350 million, 62%, would go to current use and the other 38%, \$134 million, would be invested in long-term endowment.

If you have not yet looked at this, if you continue to go through it, you see a summary for all the units. After that, you can check your individual college or program, etc. in terms of how those priorities are divided. For instance, this would be a fairly typical division in the School of Education. As you can see, the goal is for professorships, a number of programmatic initiatives, scholarships, and then finally capital expenditures and they are all spelled out in their particulars. If you were to look at each individual college, you would see similar details describing the priorities that have been agreed upon at this point.

I would be happy to take any questions that people might have.