



Fundraising Fundamentals

THE UNIVERSITY OF TENNESSEE
UT FOUNDATION
INSTITUTE OF AGRICULTURE

Setting the Stage

- This session is geared toward early- to mid-career fundraising professionals (but mostly early...)
- We will be discussing foundational mechanics of fundraising



**Ashley
Eshleman**

Senior Associate Director
of Planned Giving



**Madeline
Shelly**

Director of Development,
Herbert College of
Agriculture



**Laura
Zimbrick**

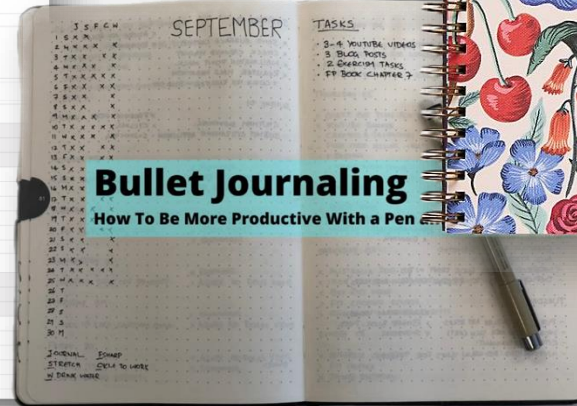
Senior Director of
Development, College of
Veterinary Medicine



monday.com



smartsheet



Trello

Proposal sent	\$	30,000	\$	50,000	40.00%	two scholarships for 5 years	Outright	2027
Proposal sent	\$	-	\$	750,000	10.00%	redoc (orig 250k for avian)	Planned	2027
Solicitation			\$	52,853	100.00%	equipment donation GIK	Outright	2027
Solicitation	\$	1,600,000	\$	3,300,000	75.00%	33% of estate to COE/CVM	Planned	2027
Solicitation	\$	360,000	\$	400,000	75.00%	18% of property in trust in Siesta Key for scholarship + curr	Blended	2027
Solicitation	\$	50,000	\$	100,000	75.00%	estate redocumentation	Planned	2027
Solicitation	\$	5,000	\$	25,000	75%	staff award	Outright	2027
Solicitation	\$	100,000	\$	500,000	50.00%	redoc (orig 25k)	Planned	2027
Solicitation	\$	49,000	\$	1,250,000	50.00%	Seven Scholarship	Blended	2027
Solicitation	\$	35,000	\$	175,000	50%	pledge payment for 5 years of scholarship	Outright	2027
Solicitation	\$	10,000	\$	25,000	50.00%	Rick Fish scholarship	Outright	2027
Solicitation	\$	1,000	\$	25,000	50.00%	standing CT	Outright	2027
Solicitation	\$	10,000	\$	200,000	50%	patient assistance	TBD	2027
Solicitation	\$	100,000	\$	800,000	25.00%	estate update and CGA	Planned	2027
Solicitation	\$	1,000,000	\$	3,000,000	25%	estate gift for cats	Planned	2027
Cultivation	\$	5,000	\$	25,000	50	equipment donation GIK	Outright	2027
Cultivation	\$	1,000,000	\$	5,000,000	50.00%	staffing in Mid TN	Outright	2027
Cultivation	\$	75,000	\$	100,000	50.00%	scholarship support	Outright	2027
Cultivation	\$	50,000	\$	250,000	50.00%	oncology	Planned	2027
Cultivation	\$	25,000	\$	100,000	50.00%	feline	Planned	2027
Cultivation	\$	25,000	\$	100,000	50.00%	equine	Planned	2027
Cultivation	\$	25,000	\$	50,000	50%		Planned	2027
Cultivation	\$	-	\$	-	50.00%	estate adjustment	Planned	2027
Cultivation					50.00%	shelter med	Planned	2027
Cultivation	\$	25,000	\$	30,000	25.00%	recruitment interest	TBD	2027
Cultivation	\$	25,000	\$	30,000	25.00%	scholarship	Outright	2027
Cultivation	\$	5,000	\$	25,000	25.00%	TBD	Outright	2027
Cultivation	\$	5,000	\$	25,000	25.00%	just stepped up \$100 gift to \$5000 through RMD	TBD	2027

Stewardship	CVM		\$10k	May-26	Steward	5/13/2026		New Bern, NC
Assessment	Herbert/Extension	Madeline	\$50k	Apr-03	Reach back out	4/7/2026		Marco Island, FL
Assessment	Extension	Jai			Coordinate with Charley	2/20/2026		Middleton, TN
Assessment	CVM	Laura			Reach back out	3/16/2026		Knoxville, TN
Stewardship	CVM	Adlai	\$2.5mil	Dec-25	Steward	3/24/2026		Kingsport, TN
Assessment	Herbert	Tom	\$100k	Jun-20	Coordinate with Tom	12/2/2025	Retired in spring, Tom to follow up	Arrington, TN
Assessment	CVM	Laura	\$1mil	Jan-11	Coordinate with Laura	11/20/2025		Signal Mountain, TN
Stewardship	CVM	Paul Clark	\$113k	Dec-24	Steward	6/16/2025	redoc from \$150k in 2012	Knoxville, TN
Assessment	CVM		\$500k	Nov-91	Reach back out	5/2/2025		Knoxville, TN
Assessment	Extension	Keith			Coordinate with Keith	9/19/2025		Franklin, TN
Assessment	UTIA/Herbert				Reach back out	7/16/2025		Madison, MS
Cultivation	CVM	Tom	\$25k	Dec-09	Reach back out	12/17/2025		Miami, FL
Assessment	Extension	Tom/Charley			Coordinate	4/15/2026	in estate plan discussions	Townsend, TN
Cultivation	Herbert	Keith	\$50k	Jun-18	Compile proposal	6/4/2026	work on land information	Cedar Hill, TN
Stewardship	CVM	Laura	\$350k	Sep-22	Steward	5/13/2026		Sweetwater, TN
Solicitation	CVM	Laura			Laura leading	1/28/2026		Farragut, TN
Assessment	CVM	Josh White/Laura			Coordinate with Laura	2/1/2026		Phoenix, AZ
Assessment	Herbert	Madeline			Coordinate with Madeline	4/17/2026		Knoxville, TN
Assessment	CVM	Laura	\$250k	Nov-18	Follow up with Laura	9/29/2025		Tryon, NC
Redocumentation?	IPS	Kristen	\$200k		Follow up with Kristen	11/5/2025	IPS redoc	Knoxville, TN
Cultivation	Herbert/Extension	Tom, Charley	\$110k	Feb-11	Work with Tom and Charley	4/16/2026		Knoxville, TN
Cultivation	Herbert				Reach back out	12/17/2025	reschedule meeting	Knoxville, TN
Assessment	Extension	Tom	\$52k	Jun-18	Coordinate with Tom	12/17/2025	land gift in kind	Andersonville, TN
Assessment	CVM	Laura				2/12/2026	Laura in contact with, potential follow up	Lytle, TX
Cultivation	CVM	Tom	\$150k	Jan-19	Go see	2/22/2026		Henegar, AL
Assessment	CVM	Laura			Reach back out	12/19/2025	contact when in area	Dalton, GA
Stewardship	CVM	Laura	\$750k	Jun-18	Steward	9/11/2024		Nashville, TN
Assessment	UTIA		\$10k		Reach back out	1/2/2025		Murfreesboro, TN
Stewardship	Herbert/Extension	Tom			Coordinate with Tom	3/6/2026		Columbia, TN
Assessment	Herbert	Madeline			Initial reach out	3/9/2026		Kennesaw, GA
Stewardship	CVM	Laura		May-26	Steward	5/6/2026	Notify of capital campaign launch for CVM	Powell, TN
Assessment	Herbert				Reach back out	3/17/2026		Orlando, FL
Assessment	Herbert	Keith			Coordinate with Keith	8/9/2024	No gift since 2017	Cedar Hill, TN
Assessment	Herbert	Tom			Coordinate with Tom	11/20/2025		Knoxville, TN
Assessment	CVM	Laura	\$400k	Sep-21	Coordinate with Laura	1/19/2026		Lakewood Ranch, FL
Assessment	Herbert				Reach back out	12/17/2025	Stated he wanted in his will for potentially \$50k	Goodlettsville, TN
Assessment	CVM	Laura	\$100k	Jun-18	Coordinate with Laura	2/10/2023		Columbia, TN

Visit Range						
Last Visit Date						
Last Contact Date						
Visit_Range	Last_Visit_Date_by_DO	Last_Visit_Date_Anyo..	Contact_Range	Last_Contact_Date_Assigned_DO	Last_Contact_Date_..	
0-3 Months	3/9/2026	3/9/2026	0-3 Months	3/9/2026	3/9/2026	
More than 12 Months	8/2/2021	6/16/2023	More than 12 Months	8/2/2021	11/17/2025	
More than 12 Months	9/13/2024	6/4/2026	More than 12 Months	9/13/2024	6/4/2026	
0-3 Months	6/4/2026	6/4/2026	0-3 Months	6/4/2026	6/4/2026	
Never Visited	-	9/24/2018	Never Contacted	-	9/24/2018	
More than 12 Months	3/26/2025	3/26/2025	7-12 Months	8/2/2025	8/2/2025	
0-3 Months	4/8/2026	4/8/2026	0-3 Months	4/8/2026	4/8/2026	
More than 12 Months	12/16/2024	12/16/2024	More than 12 Months	12/16/2024	12/16/2024	
4-6 Months	2/19/2026	2/19/2026	4-6 Months	2/19/2026	2/19/2026	
4-6 Months	1/15/2026	4/8/2026	4-6 Months	1/15/2026	4/8/2026	
Never Visited	-	4/8/2026	Never Contacted	-	4/8/2026	
Never Visited	-	-	Never Contacted	-	9/6/2013	

Planning Your Travel

- When is the right time to visit? And when you do bring your dean?
 - Planning around events and dean travel
 - Cultivation and solicitation
- Anchor visits, and everybody else
 - Travel lives and dies with your anchor visits
 - Book 4-6 weeks out for anchors, 2-4 for secondary, 1-2 for tertiary
 - Solicitation>Stewardship>Cultivation>Assessment
- Loyalty programs!



Getting a Meeting

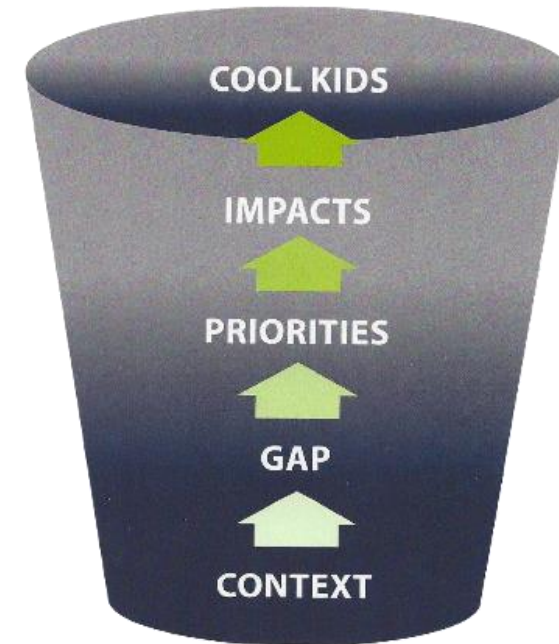
- Be clear about your intentions
 - Don't let them be surprised that you want to meet to talk about fundraising
- Use multiple methods to reach out
 - Don't be afraid to pick up the phone!
 - Build a cadence – this is where your pipeline tool comes in!
- Make it convenient for them
- Have a call-to-action and indicate a follow-up
- Remember – you are providing them with a valuable service!

Prepping For a Meeting

Priority Menu

- Top institution priorities: “Rule of 3”
 - Tailor to their stated interests, if you can
 - Involve faculty members when needed
- Write it out, practice, and role play
- Treat it as an assessment

90-Second Commercial



When to Make the Ask

- Start with “thank you”
- The role of contact reports in the process
- How do you know how much to ask for?
- Never make assumptions!

Constituent		Owner	How Winston Pierpont
Organization		Date	5/5/2026
Contact Method	Visit	Purpose	Stewardship
Visit Type ⓘ	In Person Visit	Type	Stewardship
▼ Contact Report			
Description	went by		
Contact Report Body	to check on him		
▼ Additional Details			
Status	Submitted	Disqualified Status	
Setting		Disqualified/Unassign Reason	
Strategy			
Associated Proposal ⓘ			
▼ For Use by Prospect Management			
Reviewed by Prospect Management			
Review Date ⓘ			
Notes			

A silhouette of a statue, likely the University of Tennessee's 'The General' statue, is shown from the back and side. The statue is holding a torch that is lit, with bright orange and yellow flames. The background is a sky with soft, orange and blue clouds, suggesting a sunset or sunrise. A semi-transparent dark grey banner is overlaid across the middle of the image.

Lead With The Mission

Life Happens: How to Pick Up The Ball After It's Been Dropped

I hope you are having a great start to your spring. I've been thinking about the proposal I brought you last August about your potential interest in supporting the Livestock Judging Team. If I have made an incorrect assumption about what would be most meaningful to you philanthropically, then I apologize.

If you're open to it, I would welcome the opportunity to reconnect and talk about what is important to you and where you believe you might make the greatest impact, if at all. I don't want to make any assumptions about your interests or timing.

If now is not the right time or if your thinking has changed, that is completely fine. If a conversation between us would still be helpful, I would be glad to find a time that works for us.

I appreciate your candor and look forward to hearing from you. Thank you for all you do to support UT.

Deep Thoughts

Make **no assumptions**

Build **solid internal** relationships

“Dollars raised” is a **lag indicator**



Discussion

- What pipeline platform/strategy works for you?
- How have you been successful at getting a meeting?
- Failing up and course-correcting anecdotes



Please take one minute
to complete our session
evaluation and
committee interest form





Thank you to our Conference Host and Sponsors

