

Institutional Advancement Partnership



LEHMAN
COLLEGE



Institutional
Advancement

This document provides a set of protocols for partnership with the Division of Institutional Advancement on the development of leadership and major gift proposals.

Cultivation and Solicitation of Prospective Donors

Cultivation of donors and solicitations are important components of all university fundraising – and therefore central to Lehman College’s initiatives to advance our philanthropic investments. Some critical understandings, common to all individuals working to advance the college through development and fundraising, will help ensure there is deep coordination between offices at all levels, such as:

- » Cultivation plans, to include a timeline, people for the prospective donor to meet (leadership, students and faculty), background information on the donor, presentation materials and scripts, etc.,
- » Sign-offs on all proposals,
- » Ensuring that the right individuals who are integral to a given project are in the right rooms during cultivation and solicitation,
- » Follow up with prospective donors after meetings, and
- » MOUs between the College and the donor.

Philanthropic Proposal Registration to indicate your intention to pursue a specific donor is required via [Lehman College Form](#).

Working with Institutional Advancement

- » Lehman College considers a major donor is someone with the ability to give \$10,000 or more—or someone who has been identified as having significant philanthropic capacity and demonstrates a willingness to give. This includes work with individual donors, foundations and corporations.
- » Proposals need to be vetted by departments, deans, the Provost’s Office, Institutional Advancement and for higher-level proposals, by the President. Please see the Approvals Process on page 3.
- » **Government grants will always go through the ORSP and Research Foundation.**
- » **Plans for cultivation and solicitation meetings** need to be forwarded to the VP for Institutional Advancement.
- » **Cultivation meetings should be followed up with thank you notes**, including follow up – such as opportunities for the donor to experience Lehman’s campus, faculty and students – as much as possible.

» **Solicitation meeting planning includes:**

- A presentation deck,
- A script,
- Background materials including profiles of individual donors and/or individuals representing prospective institutional partners, and the history of a given prospective donor's past philanthropy.
- Plan for leadership to sign off on the presentation materials and let Communications and Marketing know well in advance of the need for designed materials. The people who will lead the meeting will need these materials as far in advance as possible.

» **Post Solicitations should be followed by:**

- Thank you emails and possibly a letter.
- Successful solicitations by thank you notes, creation of MOUs, signing of the donor's documents in consultation with Provost, legal counsel, Institutional Advancement, etc.
- Declined proposals: often mean "not right now."
 - Thank them for their time and seek their advice.

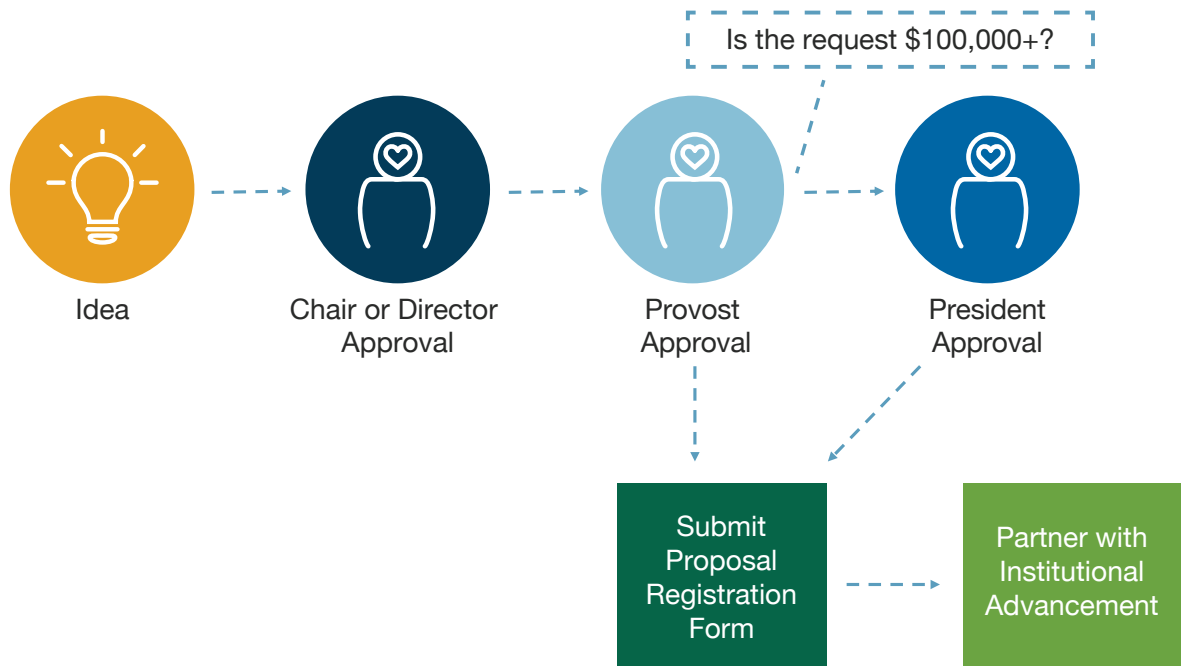
Working on Programmatic, Principal and Transformational Gift Proposals

A clear understanding of the parameters of the project and assignments need to be established at the beginning, taking the following steps:

- » **The team within the Division of Institutional Advancement needs to be brought in once the project is approved by all necessary parties.** This gives IA a sense of the scope and needs so that they have time to do the research necessary and develop an approach to finding the funding needed.
- » Philanthropic Proposal Registration is required via Lehman College Form
- » The Division of Academic Affairs needs to work to clearly outline any proposal that is based within one of the Schools or proposals that are intra-school or cross-divisional;
 - A clear understanding of who will be the head writer and organizers needs to be assigned at the first meeting;
 - A filing system needs to be established in Teams for easy use of all parties involved
 - A list of the components of a given proposal needs to be understood before the writing begins – i.e. chairs, scholarships, centers, offices, speakers series, etc.;
 - Clear assignments will be given to Academic faculty and staff and a timeline needs to be established up front;
 - The timeline needs to be sent to all parties – to include: Division of Academic Affairs; Division of Institutional Advancement; Division of Finance and Administration; and for major and leadership gifts – the President's Office;
 - The timeline needs to include 5 days to 10 working days to be laid out or designed. The VP for Institutional Advancement will need to approve the final materials before showing a donor.

- **The lead writer needs to meet with the Finance and Administrative Offices** to establish the parameters of the budget and come up with an agreed upon deadline;
- Proposals need to be
 - **spellchecked, grammatically edited, and carefully formatted. Proposals should be delivered to Institutional Advancement in Times New Roman 11 pt. (for body text) and must be as near completion**—additions of some institution-wide verbiage and for relatively minor editing.
 - **The voice throughout the proposal needs to be third person** – with no possessive pronouns.
 - **Formatting should include good pagination, appendices, etc. IA will provide samples of formatting.**
 - **Please delete color from proposals and budgets** and other documents – as it makes it difficult to edit.
- » Final copy of submission should be sent to all signoffs.

Approvals Process



Sample Institutional Advancement Proposal Planning Document

Date:

Name of Project:

Prospective Donor:

Departments and personnel involved:

Lead Writer:

Editor in Academic Affairs Office:

Deadline for Submission:

Components to the Proposal:

Statistical Information Needed:

Estimated Size of Budget:

Timeline:

Meetings schedule for discussion of plan:

Assignments:

Outline and finalization of components:

First draft:

Institutional Advancement Edits:

Provost's Edits*:

To Designer and Completion:

Preliminary Budget:

Budget Finalized by Finance:

Submission of Proposal and Budget to President's Office:

Cover letter:

Submission to Prospective Donor:

*(Return to VP of Institutional Advancement who will work with Communications and Marketing and the President's Office to finalize edits before final submission)

Sample Formatted Proposal

Proposal for the Development of a BBA Program in Real Estate Studies

in the Department of Economics and Business
School of Natural and Social Sciences
Lehman College, The City University of New York

In Partnership with

XXXXXXX

August, 2020

Introduction

Lehman College is an anchor institution in the Bronx and the only comprehensive four-year public institution of higher education in the borough. Further, it is located on a 37-acre bucolic campus between the Kingsbridge and Bedford Park areas. Lehman is a transformative place, where every day, the children of immigrants and families considered to be among the lowest economic quadrant strive and complete undergraduate and graduate degrees often in spite of considerable challenges. In 2017, the College launched the 90x30 challenge, a bold initiative designed to improve educational attainment in the Bronx, (a borough previously referred to by the Equality of Opportunity Project as “among the worst counties in the U.S. in helping poor children move up the income ladder,”) by increasing the number of graduates from 45,000 to 90,000 by the year 2030.

In spring 2019, Lehman graduated 3,676 students, the highest graduating class in Lehman’s history, contributing to the largest increase in the School’s six-year graduation rate over the last five years (11.9%), positively impacting the College’s 90X30 goal, and making it the only senior college in CUNY to have increased its graduation rate in each of the last five years. Indeed, a 2019 analysis by *The New York Times* showed that Lehman’s actual graduation rate was 9 percentage points higher than its expected graduation rate, giving it the highest positive gap among CUNY senior colleges. A study highlighted in *The Chronicle of Higher Education* placed Lehman as third among four-year public colleges in the nation for the College’s “mobility rate.” Similarly, the American Council on Education ranks Lehman first among Hispanic-serving institutions for helping students improve their academic standing through education. As a top-ranked Hispanic serving institution, Lehman serves more than 15,500 undergraduate and graduate students and approximately 130 cultures are represented within Lehman’s student body.

Lehman students are particularly resilient, focused and driven, often shouldering the diverse responsibilities of studies, work and family while attending school. The College’s student population is a microcosm of the area it serves: approximately 59% of undergraduates come from households with incomes below \$30,000; 93% of undergraduates are students of color; 88% of full-time freshmen receive some form of financial aid (72% Pell recipients); and 53% speak a language other than English at home.

And they excel: garnering national recognitions and receiving competitive scholarships and fellowships funded by foundations, non-profit organizations, and government agencies to help underwrite the cost of going to graduate school, studying abroad, conducting research, and engaging in other scholarly pursuits. In AY 2018-2019, Lehman students won more than 70 awards, totaling more than \$2.3 million, besting the previous two years’ records of 34 awards

totaling nearly \$608,000 for AY 2016-2017 and 58 awards totaling more than \$1 million for AY 2017-2018. In January 2020, the College was selected as a “Fulbright Program Top Producing Institution for the 2019-2020 academic year.” In last three years, our students have received 162 awards totaling more than \$4 million. Students have earned some of the most prestigious scholarships and fellowships in the nation:

- The Paul and Daisy Soros Fellowship for New Americans.
- The Jonas E. Salk Awards for medical or graduate education.
- The Boren Scholarship to study in Japan.
- Four students received Fulbright Fellowships to study in Bulgaria, Mexico and Poland.
- The Jeanette K. Watson Fellowship for Summer Internship.
- Fifteen students received funding to pursue graduate education at some of the finest colleges and universities in the nation.
- Eleven students received the Teach for America Fellowships.
- Two students received summer research development grants from the National Institutes of Health.
- Twelve students received Pre-Health Internship Awards.

Throughout their education, it is the goal of the College that students graduate “Educated, Empowered and Engaged,” three central pillars at the core of the undergraduate experience.

The Robin Hood Foundation, Donald A. Pels Charitable Trust and The Carroll and Milton Petrie Foundation, among other external partners, have joined in support of a focused effort to promote student success at Lehman – through programs that expand coaching, advising and career placements for cohorts of students throughout their college careers at Lehman, thereby ensuring timely degree completion. Lehman’s internationally reflective graduates penetrate the leadership of more than 90 professional and intellectual degree pathways, supporting professions and institutions throughout New York City and throughout the country.

Lehman College is uniquely positioned to continue to expand and to reimagine its key role by partnering with business leaders in its community and to establish a specialization in the study of real estate business. This positioning is consistent with current discussions at the College to establish a School of Business, with a real estate, business incubation, and technology niche, that serves the labor needs of the region and aligns with Lehman’s commitment to increase the number of people receiving degrees and meaningful credentials over the coming decade. Our Department of Economics and Business is poised and ready to advance this transformational positioning for the College, the Bronx, and New York through this proposed strategic partnership with and the Real Estate Board of New York (REBNY).

Department of Economics and Business

The Department of Economics and Business is one of the ten departments in the School of Natural and Social Sciences at Lehman College. This department offers three academic programs—economics, accounting, and business administration— which together award five undergraduate and two graduate degrees. Serving over 1,400 majors, the department is one of the largest departments at Lehman College in terms of both the total number of declared majors

(undergraduate and graduate) and full-time equivalent (FTE) students (undergraduate and graduate students).

Why Real Estate?

Core to the mission of the CUNY system is to provide a bridge to opportunity to the underserved. Over half of Lehman students are the first in their families to attend college and many are immigrants. As reported in the “Bronx Economic Outlook of 2018” (published by the Office of New York State Comptroller Thomas P. DiNapoli), the number of immigrants in the Bronx doubled between 1980 and 2017, making up 37 percent of the total Bronx population and 60 percent of self-employed entrepreneurs. For immigrant communities such as the Bronx, a real estate program, especially one that incorporates the development of skills through experiential learning, will be particularly appealing because it will give opportunities and pathways to financial independence through business incubation and ownership, while also providing career paths in many areas including finance and investment, management, and the law. A Real Estate program at Lehman College where the annual tuition will be \$7,210 (based on academic year 2020-21 rates), will make it the most affordable of any such program at competing independent and proprietary colleges between northern Manhattan and Dutchess County in New York. Furthermore, the BBA Real Estate program at Lehman, in partnership with XXXXXXXX, creates a pipeline opportunity that positions the College to become the region’s leading producer of underrepresented/minority professionals for the real estate industry.

A Program Aligned with XXXXXXXX

Rooted in New York City with national reach, a partnership with XXXXXXXX brings the vast experience of one of the nation’s foremost real estate firms with broad experience in the residential and commercial arenas, that extends in many directions including office, retail and hospitality specializations to the classrooms at Lehman College; a mutually beneficial relationship merging “town and gown” to further advance the labor and economic needs of the region. XXXXXXXX’s long leadership as a powerful organization, with its breadth of history and deep understandings of residential and commercial real estate development and management would provide vast case study opportunities for students at Lehman College, where faculty will amplify the theoretical and research underpinnings of the field. The strategic partnership also provides a platform for a nationally and internationally leading firm to partner as thought leaders with Lehman faculty in the development of a uniquely focused real estate program that is based on experiential learning and the opportunity to study cases of some of the most creative real estate development and financing in recent history. XXXXXXXX’s leadership in the City would bring erudition to young and promising real estate professionals, sales people and brokers, many of whom will practice in the City and many who will focus on the growing opportunities in the Bronx, giving Lehman students in the program the opportunities to hear from some of the most distinguished practitioners in the field. We see this as a win-win for both Lehman and XXXXXXXX, and an excellent example of a transformational public-private partnership that ignites new possibilities.

A Named Real Estate Degree Program

The Department of Economics and Business’s long-term goal is to develop a Real Estate degree program that has a blend of strong theoretical grounding and the promotion of practical and analytical skills necessary for success in the real estate industry. Experiential learning will be a key component of this degree program, as it is becoming increasingly important to equip students with career-ready skills/competencies. Students will acquire hands-on learning experience through the use of case studies and projects in the curriculum, development of industry partnerships and internship opportunities, and promotion of student-industry executive interactions, all of which will help bridge the gap between classroom and industry. Development

of workforce-ready skills and exposure to professional career life is particularly important and relevant for the majority of the student population Lehman serves, many of whom are the first college attendees in their families. Additionally, the new degree program will help prepare students so that they will be eligible to sit for the real estate sales and brokerage certifications, further equipping them to be career ready upon graduation.

In this regard, Lehman College proposes a new undergraduate Bachelor of Business Administration (BBA) to be called: The XXXXXXXX Real Estate Degree Program at Lehman College. The new undergraduate degree program will follow a phased approach, and will begin, first, with a concentration area in real estate in Lehman's existing BBA program. The initial approach is the most feasible for the following reasons:

- This is the least expensive plan to initiate the program given the time it would take to recruit appropriate full-time faculty and staff to support program. For the initial start, the Department will utilize adjunct faculty.
- Three courses (Real Estate Finance, Real Estate Marketing and Real Estate Law) will be needed to develop a concentration within Lehman's current BBA program.
- A concentration paves the way for building student majors to help provide a stream of tuition revenue as the Department builds the new degree program over a period of 3-5 years. This length can be decreased with significant funding from the partnership.
- During this initial period, industry partnerships will be established, and an advisory board will be formed with these partners to help develop the full program.
- A new BBA degree in Real Estate will have seven proposed real estate core and elective courses (25 credit hours) to be introduced within 2-3 years of offering a concentration within the current BBA.
- Students completing this degree will satisfy a common set of General Education/Liberal Arts requirements, Pre-Business requirements, Business Core courses, and Real Estate courses.

A new BBA degree in Real Estate will have seven proposed real estate core and elective courses (25 credit hours) to be introduced within 1-2 years of offering a concentration within the current BBA. The courses to be introduced will include:

- Real Estate Finance and Investment
- Real Estate Marketing
- Real Estate Law
- Real Estate Leasing
- Real Estate Valuation
- Real Property Management
- A Capstone Project Class, to involve an applied case study involving elements of all the courses covered in the program as well as presentation to a team of industry professionals, will be a culminating experience of the degree. An elective course will prepare students for the Real Estate Broker's License.
- Students will be required to have internships in the industry.

Industry Partnerships

Activities to be introduced as part of industry partnerships include, but not limited, to the following:

- An annual round table of industry executives to introduce all real estate majors to the latest industry trends.
- Industry experts will be invited to speak in classes, and
- Faculty and industry professionals will collaborate on research and teaching
- Program will collaborate with industry to establish a *Real Estate Research and Practice Center* at Lehman College.

Through the various elements outlined in this new degree program, we aim to fulfill Lehman's mission of producing graduates who are "Educated, Empowered and Engaged," three central pillars at the core of the undergraduate experience at Lehman College.

Distinct Components of the XXXXXXXX Real Estate Program at Lehman College

In launching a BBA program at Lehman, the College will look to create a stellar program that brings leading practitioners in the fields to Lehman throughout each year. Among the components would be:

- **A distinguished Real Estate Professor to Lead the Program:** Through initial amplified investment of base salary, XXXXXXXX's investment will provide an opportunity for Lehman to bring a leading business intellectual with expertise in real estate to develop the program and hire and guide the faculty in this specialized program. Three-fulltime faculty, one full professor and two assistant professors, will be hired to run the program.
- **A Real Estate Advisory Board:** In the second year, Lehman will work to establish a Real Estate Advisory Board, populated by a variety of leaders in all aspects of the field, both from Manhattan and the Bronx. This will broaden Lehman's ability to establish relationships with businesses where students will have opportunities to garner on the ground experiences in the field through internships and mentorships.
- **A XXXXXXXX Distinguished Lecture in Real Estate Business Practice:** Once each semester students will have the opportunity to hear one of New York's leading real estate practitioners lecture, bringing case studies and or hearing from the breadth of the challenges and successes that have built each of their careers.
- **An Annual XXXXXXXX Luncheon:** Annually BBA students and faculty will have a round table luncheon, to take place at Lehman or in the offices of XXXXXXXX, enabling students to meet with XXXXXXXX executives over lunch to hear about their work and to have discussions about opportunities and directions in the real estate field.
- **XXXXXXX Scholars Program (Year 5):** Should XXXXXXXX consider further investment after Year 3, the program's endowment, once fully vested and the BBA program well launched, will afford Lehman to distribute ten XXXXXXXX Scholars awards, scholarships for exceptional rising seniors in the process of finishing their degrees, will be given to students with outstanding promise to make contributions in the field.

Insert budget here.

Projected Impact of a XXXXXXXX Co-launch Real Estate BBA Program

Talent, knowledge and real estate acumen will be hallmarks of the Lehman students graduating from the BBA Program launched in partnership with XXXXXXXX . Students will have had the opportunity to acquire credit for working in the field and learning from top practitioners in New York City, and to demonstrate through a capstone project the range of their experience and learning. They will have been introduced through public programs to lead real estate developers and other practitioners of the variety of opportunities and cutting-edge practice.

- Graduates of the program with 9 credits in real estate will qualify to take real estate salesperson licenses in addition to being qualified for entry level position in real estate firms/organizations or in other industries like finance and marketing with a focus on real estate.
- Graduates of the BBA degree in Real Estate (with 25 credits in real estate) will be prepared to take on mid-level management and analyst positions with real estate organizations as well as with finance, legal and marketing organizations with focus on real estate business. Additionally, they may be ready to sit for the real estate brokerage license exam upon completion of their course work and even before graduation.

Launching of a BBA Program at Lehman College will afford new experiential learning opportunities to a new generation of business students who are both eager to learn and practice and who will bring their unique, international and ambitious perspectives to the field of real estate. These young people will not only bring new energy to the industry, but they will be leaders who will reimagine their neighborhoods and the City writ large. They will be change-makers with broad Lehman undergraduate education, who have been highly valued and mentored on a campus where all students have opportunities to excel. XXXXXXXX's leadership in helping to launch this important program will be a symbol of the growing importance of the education achieved by generations at The City University of New York, and it will be testament to other individuals, foundations and corporations of the importance of investment in leading transformative education communities such as Lehman College.

Contact

Main Number

718-960-8350

Tara Regist Tomlinson

Director, Advancement Initiatives

tara.registtomlinson@lehman.cuny.edu

718-960-2416

Danielle Jean-Marie

Chief of Staff

danielle.jean-marie@lehman.cuny.edu

718-960-8351



LEHMAN COLLEGE
DIVISION OF

Institutional
Advancement

lehman.edu

250 Bedford Park Blvd W, Bronx, NY 10468