

# College Donor

QUARTERLY

a publication of the **Fund for Academic Renewal**

## An Interview with Meg Cline

*FAR Director Emily Koons Jae interviewed Meg Cline, CFA and CFP, the vice president for gift planning and trust services at the University of Illinois Foundation, where she has held leadership positions for nearly two decades. Ms. Cline earned her B.S. and M.B.A. from the University of Illinois Urbana-Champaign (UIUC).*



### Could you talk a bit about your role at the University of Illinois Foundation?

My team and I are the “how-to” people behind a gift. Whether a donor wants to fund a chair or a scholarship, we want to understand their “why” so that we can develop gift agreements that achieve the donor’s philanthropic objectives and are in-line with what the academic institution can effectively execute on behalf of that donor. We also seek to understand their portfolio of assets so we can suggest what instruments might be most effective for funding their gift.

### Defining a philanthropic goal can be challenging for donors. How do you approach those conversations?

It is important that donors are willing to share what kind of impact they seek to have. Describing that as a story or compelling vision is the most helpful thing they can do for a university.

I encourage donors not to necessarily come forward with one idea, but to step back for a moment and think about how they want to shape the institution and what the desired impact of their philanthropy is. Defining a donor’s intentions is key, and that is why you will see a statement of intention right up front in our gift agreements.

### The placement of donor intent at the top of the gift agreement seems to signify the university foundation’s commitment to honoring a donor’s wishes. Can you share more about what protections the foundation has in place?

We have strong language incorporating donor intent into the gift agreement. We also have a stewardship committee at the foundation who oversees donor intent through regular audits and checks and balances. That committee is not just a rubber stamp. They carefully evaluate situations, particularly

*continued on 2*

## WHAT’S INSIDE

**Oasis Profile**  
UNC–Chapel Hill’s  
Program for Public  
Discourse | 2

**Donor Tips**  
Ask About Greatest  
Needs | 3

**From the Bookshelf**  
Philanthropy: from Aristotle  
to Zuckerberg | 3

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**INTELLIGENT COLLEGE GIVING.** The Fund for Academic Renewal serves alumni and college donors who aim to support a renewal of the highest standards on college campuses through targeted philanthropy.

# OASIS PROFILE: UNC–Chapel Hill’s Program for Public Discourse

The University of North Carolina (UNC)–Chapel Hill’s Program for Public Discourse is an exemplary model of how to foster civil discourse on campus. The program aims to equip students for debate and deliberation through a student fellowship program, reading groups, the UNC Speech Competition, and faculty partnerships. The program is led by Executive Director Kevin Marinelli, teaching associate professor in the Department of Communication.

Undergraduates from any major can participate in the Program for Public Discourse. Its student fellowship initiative, the Agora Fellows, selects five to eight students per school year to engage with pressing issues of public concern through reading groups, debate, and discussion. The program serves the broader student body by sending faculty to classrooms and student organizations to teach students how to articulate their opinions and respond to opposing viewpoints with civility and respect. Last year, the program co-hosted UNC’s inaugural speech competition where students addressed the topic, “How Can UNC Educate the Global Citizen?”

The Program for Public Discourse brings academics and the community together through its popular Abbey Speaker Series, which is free and open to the public. In the 2020–2021 academic year, the Abbey Speaker Series attracted over 1,700 attendees,

70% of whom were not a university student or employee. In February, a panel on “The Future of Affirmative Action” will feature Columbia University Professor John McWhorter, ACTA’s 2022 Philip Merrill Award recipient; Brown University Professor Glenn Loury, who participated in our 2022 ATHENA Roundtable; Rachel Moran, Distinguished and Chancellor’s Professor of Law at the University of California–Irvine School of Law; and Theodore Shaw, Julius L. Chambers Distinguished Professor of Law at the UNC School of Law. The Abbey Speaker Series was endowed in 2021 by 1974 UNC alumna Nancy Abbey and her husband Doug Abbey.

The Program for Public Discourse also serves faculty through workshops, curriculum and classroom consultations, and its annual “Symposium of Collegiate Programs for Public Discourse.” Faculty from any discipline can apply for a two-year appointment as a Program Faculty Fellow to teach courses, publicize events, host workshops, lead a seminar, write for the program’s blog, and present their own work.

ACTA is proud to recognize UNC–Chapel Hill’s Program for Public Discourse as an Oasis of Excellence. Its work to promote civic virtues and civil debate is a critical part of restoring public discourse on college campuses and throughout the nation. 🌿

## Interview with Meg Cline, *from page 1*

when a donor is deceased and can no longer articulate their intentions. They ask key questions, such as, “What did the benefiting unit do to try to honor the original intent?”

Our gift administration office is always looking at fund balance accumulations and conducts its own annual audits. Additionally, we have a system so that our funds at the foundation are distributed to a fund on the university side that has a matching code. For instance, we cannot send student scholarship dollars to a professorship/faculty account, a faculty support fund, or a research fund.

**What advice do you have for donors thinking about giving to a college or university?**

Communication between the donors and institutions up-front is key. Donors should ask what the long-term priorities of the institution are right now and how their desired impact helps support that priority. That does not mean that those must be the donor’s priorities, but if the donor’s

“I will also say organizations like FAR that really help to educate donors on what it means to be a philanthropist are so crucial.”

priorities and the institution’s priorities are so far apart that there is no common ground, it may be difficult for the donor to find satisfaction with their gift.

Those heartbreaking donor situations

in my experience have been where there has been an attempt to put a square peg in a round hole or vice versa, where the institution and donor do not communicate to fully understand the expectations around a gift, which generally leave disappointed donors and academic institutions in the end.

I will also say organizations like FAR that really help to educate donors on what it means to be a philanthropist are so crucial. Not all donors who find themselves fortunate enough to have assets to give away have necessarily ever been taught how to give money away responsibly, what questions to ask, or how those gifts could be structured to maximize the impact of their gift. It is not an easy thing to do. 🌿

## Ask About Greatest Needs

In our featured interview, Meg Cline recommends that donors who want to give effectively ask a fundamental question: What are the greatest needs or the most pressing priorities of this institution right now?

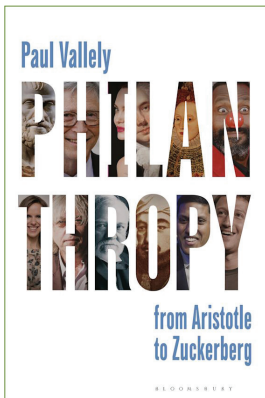
At the beginning of the giving process, university fundraising professionals often present donors with giving options. Like asking a waiter, “what do you recommend?” can narrow down a restaurant’s menu choices, the donor can understand the giving options better when asking about the university’s top priorities.

Donors who already have a destination in mind can benefit from learning specifics. For example, a medical college might need research funding more than an endowed professorship. Donors may discover that their vision is fulfilled better by supporting a different program or department than originally anticipated.

Harmonizing your goals with university leadership is key to a successful gift. “Almost every large university has a gift planning office,” said Ms. Cline, “and their charge is really to help provide education about ways to give to support the institution through a variety of assets and giving instruments. Gift planners are motivated to help donors make charitable gifts, but in a way that is both a good gift for the donor and the institution.”

## FROM THE BOOKSHELF

### Philanthropy: from Aristotle to Zuckerberg by Paul Vallely



Paul Vallely's *Philanthropy: from Aristotle to Zuckerberg* is an ambitious, 756-page volume that, as the title suggests, surveys the history of philanthropy. Interspersed amidst each chapter are conversations between the author and prominent philanthropists and their advisors, particularly those active in Great Britain. Mr. Vallely's long career in journalism is evident throughout the book in the careful presentation of

historical facts and their relationship to present-day charitable practices.

*Philanthropy* is not a disinterested historical account. The author argues that philanthropy has lost its soul, and he proposes a philosophy of philanthropy that is “rooted in relationship, mutuality, and partnership” which he terms “Reciprocal Philanthropy.” He describes this as “philanthropy with a human face . . . It comes from the heart as much as the head.” Rather than a charitable gift being simply an isolated act of an individual, he argues that philanthropy involves a three-way relationship between the donor, recipient, and the society in which they live. A successful gift is one that creates a “mutually satisfactory relationship between donor and recipient, in a way which creates both a personal bond and social harmony.”

Despite its length, *Philanthropy* is a highly readable account that helps make sense of the cultural factors that have shaped the nonprofit sphere as we know it today. Mr. Vallely's insight into current practices is well worth the reader's time.



*“I’m not the same old \$20-contribution person I used to be, you know, Marlene.”*

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A link or QR code to one of the great FAR articles that has been published recently.



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## About FAR

A program of the American Council of Trustees and Alumni, the **Fund for Academic Renewal (FAR)** serves alumni and college donors who aim to support a renewal of the highest standards on college campuses through targeted philanthropy.

With access to a network of on-campus contacts, FAR assists donors in maximizing the impact of their investment by helping them craft gift agreements that are carefully tailored to achieve their goals. FAR has guided over \$188 million in gifts since 2016. Because every gift is different, FAR offers personalized guidance for individuals at every giving level.

Thanks to a generous grant from the Diana Davis Spencer Foundation, FAR provides these services, including legal consultation from Arnold & Porter LLP, at no cost to donors.



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