The Giving Cycle

Identifying & Qualifying
- Data & Analytics
- Research
- Volunteers
- Annual Fund
- Field Officer visits

Solicitation
- Field Officer visits
- Call Center
- Mail
- Social Media
- Data Systems

Cultivation
- Events
- Communications
- Volunteer service
- Field Officer visits
- Data systems

Stewardship
- Reports
- Events
- Field Officer visits
- Recognition
- Data Systems
Divisional Mission Statement

By empowering philanthropy, we generate private resources essential to student success
Divisional Objectives

1. Generate private resources for institutional priorities

2. Purposefully engage constituents and inspire support

3. Empower philanthropy by leveraging technology and information

4. Exemplify a culture of leadership, excellence, and integrity
Growing Productivity

<table>
<thead>
<tr>
<th></th>
<th>Emails</th>
<th>Alumni Fair</th>
<th>Assoc. Members</th>
<th>Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change</strong></td>
<td>+60%</td>
<td>+333%</td>
<td>+480%</td>
<td>+565%</td>
</tr>
<tr>
<td><strong>2013</strong></td>
<td>80,000</td>
<td>3,100</td>
<td>12,000</td>
<td>1978</td>
</tr>
<tr>
<td><strong>2010</strong></td>
<td>50,000</td>
<td>300</td>
<td>2500</td>
<td>350</td>
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</table>
## Growing Productivity

<table>
<thead>
<tr>
<th></th>
<th>Total Donors</th>
<th>New Donors</th>
<th>Over $10,000</th>
<th>$ Totals</th>
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</thead>
<tbody>
<tr>
<td>Change</td>
<td>+33%</td>
<td>+53%</td>
<td>+35%</td>
<td>+27%</td>
</tr>
<tr>
<td>Last 3</td>
<td>11,609</td>
<td>4,913</td>
<td>173</td>
<td>$18.6M*</td>
</tr>
<tr>
<td>Prev 3</td>
<td>8,759</td>
<td>3,208</td>
<td>129</td>
<td>$14.7M</td>
</tr>
</tbody>
</table>
UVU was recognized as

2013

Most improved fund raising program in the nation among similar institutions

by the

Council for the Advancement and Support of Education (CASE)
in a blind assessment based on the past three years of data
SWOT Analysis

**Strengths**
- President
- Deans
- Central coordination
- Donor engagement

**Weaknesses**
- Thin pipeline & shallow pool
- Limited time & resources
- Low constituent affinity
- Staff 1-deep

**Opportunities**
- Untapped constituencies
- Large alumni base
- Social media
- Value propositions

**Threats**
- Poaching
- Retirements
- Volatile economy
- Other campaigns
Strategic Responses to SWOT

**Leverage Strengths**
- Presidential visibility
- Deans’ leadership
- Central prospect management
- Quality engagement

**Manage Weaknesses**
- Accelerate prospecting
- Connect with events
- Message aggressively
- Career pathways

**Seize Opportunities**
- Annual giving
- Tap affinities

**Avert Threats**
- Targeted retention
- Succession planning
Deepening the Major Prospect Pool

- Acquiring & Growing
- Prospecting
- Networking
- Engaging Events & Aggressive Messaging
- Wealth Screening (predictive analytics)
Stronger Cadence & Connections

- 2012 Foundation Today
- 2012-13 Holland’s Highlights
- 2012-13 Alumni Connections
  (coming soon) President’s Perspectives
Pre-Campaign Vision Piece

The Arts

The arts are important because they have to do with the language of feeling, they have to do with our cultural literacy, our sense of empathy with other people.

— Sir Ken Robinson

Right: Actor and comedian Jason Alexander, best-known for his role as George Costanza on “Seinfeld,” conducted acting workshops with School of the Arts students and faculty.

At the 2013 Kennedy Center American College Theatre Festival, UVU students and faculty demonstrated their abilities by winning the national award for Outstanding Production of a Play, Outstanding Director of a Play (Chair of the Department of Theatre Christopher Clark), Outstanding Scene Design, Outstanding Costume Design, Outstanding Performance by an Actor, and Outstanding Performer and Production Ensemble.

Lower Right: UVU has been designated as an All-Steinway School, reflecting its serious commitment to the arts and music education.

Lower Left: UVU has been designated as an All-Steinway School, reflecting its serious commitment to the arts and music education.

UVU’s outstanding Ballroom Dance Company won the prestigious Open British Championships four times and won ABC TV’s “Dancing With the Stars” Collegiate Championship.

Crumbs carry us far. But the arts take us to places inside ourselves we haven’t traveled to yet. They stir our senses and lift our spirits and remind us what makes us human. Dance, music, images, and performances have been exploring their world and what it means to be alive through art for tens of thousands of years.

UVU attracts students with the talent and passion for a career in the arts and trains them to have their creativity as they secure the knowledge, skills, and experiences that are vital to success. Arts students are immersed in a stimulating learning environment that challenges them to exercise their imagination, practice creative work, and learn to innovate. The arts also enrich Utah Valley University and its extended community through courses about the arts and public exhibitions and performances.
Inspiring Development Events

- **Prospects hosted**
  - To date
  - 2014 on

- **Number of events**
  - To date
  - 2014 on
Four Year Goals
4YG-O1A, Generate private resources through effective campaigning

action ii. Wealth screen and qualify prospects

1. Screen 300,000 records
2. Surface annual, major, and planned gift prospects
3. Qualify identified major gifts prospects
4. Ongoing screening through 2017

* Assumes additional PBA funding
4YG-O1A, **Generate private resources through effective campaigning**

**action iv. Arts Building Campaign, $10 to 30 million** *

1. Prepare
2. Enlist allies and lead gifts
3. Connect with events
4. Ongoing prospecting & soliciting
5. Campus-wide team effort

* Assumes additional PBA funding
Generate private resources through effective campaigning

Scholarship Campaign, $7.5 million *

1. Total in UVU history, $10 million
2. Total during current administration will be $15 million
3. New baseline of $2 million/year

* Assumes additional PBA funding
Generate private resources through effective campaigning

College Fund Raising: $ TBD

8 Professorships @ $250,000 = $2.0 million

Each college:
1. 4-year plans’ academic priorities
2. Scholarships
3. Resource councils
4. Coordinated marketing/communication/event plans
5. Developing prospect lists

^ May require PBA support to achieve goals
Example: Collaborative planning

- Auto show VIP tent
- 3 new tiered lecture series
- Dean’s Day alumni and corporate luncheon
- Culinary Arts gala dinner
- Updating donor and outstanding alumni walls
Generate private resources through effective campaigning

action viii. Institutional Initiatives: $ TBD

1. University initiatives, projects, and centers

^ May require PBA support to achieve goals
Strategic Allocation of Top Prospects

Prioritization of Needs

Donor Interest or Alignment

Donor Allocation

UVU Relationships
4YG-O1B, **Conduct an aggressive annual giving campaign** *

actions i through iv, by 2017

1. From 4500 to **7500** annual donors

2. From 600 to **1200** license plates @ $30,000/year

3. From 650 to **800** employee donors @ $184,000/year

4. From 693 to **1000** S2S donors @ $25,000/year

* Assumes additional PBA funding
Acquire vital non-financial resources from external partners

action i. Acquire Strategic Resources

1. Land acquisition
2. *Roots of Knowledge* artwork
3. Support national enrollment efforts
4. Support athletics attendance
5. Generate engaged learning opportunities *

* Assumes additional PBA funding
4YG-O2B, **Purposefully engage and inspire support**

actions i through iv by 2017,

1. From 12,000 to **25,000** alumni memberships  
   a. 6x more likely to give, and twice as much

2. From 0.65 to **1.75%** alumni giving  
   a. 120,000 donors of @$75 avg. gift = $157,000/year

3. From 65% to **100%** resource council giving

4. Complete **5000** volunteer prospect engagements

* Assumes additional PBA funding
Purposefully engage and inspire support*

actions | National Development Outreach

1. NDO program will engage 1000 prospects and connect President Holland with key individuals, such as Doris Buffett, Bill Marriott, and Eric Varvel, leader of Credit Suisse.

* Assumes additional PBA funding
Proposed new projects & programs

• Dashboards *
• Retirees *
• Homecoming 2014 – 2017
• Promote alumni visibility and credibility
• Parents program *
• Alumni Impact through Mentorship (AIM) *

* Would require PBA funding
## Connecting with major gifts prospects

<table>
<thead>
<tr>
<th>Event</th>
<th>Events</th>
<th>Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni Relations</td>
<td>33</td>
<td>21,000</td>
</tr>
<tr>
<td>Donor Engagement</td>
<td>23</td>
<td>2,359</td>
</tr>
<tr>
<td>Gift Planning</td>
<td>35</td>
<td>1,056</td>
</tr>
<tr>
<td>National</td>
<td>12</td>
<td>500</td>
</tr>
<tr>
<td>Advisory Board</td>
<td>12</td>
<td>548</td>
</tr>
<tr>
<td>Special</td>
<td>9</td>
<td>299</td>
</tr>
<tr>
<td><strong>Total Events</strong></td>
<td><strong>124</strong></td>
<td><strong>25,762</strong></td>
</tr>
</tbody>
</table>
# Wee Care Mini-Campaign

## Donor Engagement

### 8 events ($32,000)

<table>
<thead>
<tr>
<th>Event</th>
<th>Guests</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012 First Lady's Luncheon</td>
<td>205</td>
</tr>
<tr>
<td>Wee Care Gift Announcement</td>
<td>85</td>
</tr>
<tr>
<td>Private luncheon with Barbara Barrington Jones &amp; friends:</td>
<td>35</td>
</tr>
<tr>
<td>Wee Care Center Groundbreaking Luncheon</td>
<td>53</td>
</tr>
<tr>
<td>Wee Care Center Groundbreaking Ceremony</td>
<td>100</td>
</tr>
<tr>
<td>Be the Best You Girls Camp with Barbara Barrington Jones</td>
<td>270</td>
</tr>
<tr>
<td>Wee Care Center Ribbon Cutting Luncheon</td>
<td>32</td>
</tr>
<tr>
<td>Wee Care Center Ribbon Cutting Ceremony &amp; Open House</td>
<td>200</td>
</tr>
</tbody>
</table>

**Total Guests:** 980
Expanding Stewardship Demands

- 250 annual scholarship reports
- 900 reports for Science Building donors
- 150 reports to Wee Care donors
- 72 program endowment and grant reports
- 3 books
Asst. Director of Donor Engagement

- Donor engagement / campaign event demands
- Stewardship demands
- Elder Quest
- Retirees
- Consecutive giving society
Data Solutions Specialist

Information Capture and Analysis
- historical records
- internships, engaged learning and mentored experiences
- parents, retirees, expanding alumni membership
- board and volunteer service
- events data
- regional data
- consecutive giving data
- campaign tracking

Wealth screening

Digital Imaging

Support expanded list production

Supplemental prospect research
2013 PBA Request

P1C. Arts Campaign Planning Budget $75,000 one-time
- Development events ($25,000)
- Student and faculty travel for special performances ($30,000)
- Presentation and promotional materials ($10,000)
- Cost assessment and building plan ($10,000)

P4C. National Development Outreach $30,000 one-time

P5R. Hourly support (6 data students, data clerk) $45,000 one-time
  total $150,000

P2C. Asst. Dir. Donor Engagement $72,830 base*

P3C. Data Solutions Specialist $64,268 base*
  total $137,098 base*

* includes both salary & fringe
4YG – Key Staffing Needs

- New Media Specialist
- Asst. Dir. Annual Giving
- Asst. Dir. Alumni/Parents
- Report Writer / Analyst
- Coordinator, AIM program
- Admin III, development
- Hourly events support
- IT desktop support
- UR Graphic Designer
4YG – Key Program Funding

Base

• Technology replacement/upgrading cycle
• Software licensing
• Annual giving mailings
• Membership marketing
• NDO program

One-time

• Call center upgrade
• Campaign events and celebrations, various
4-Year Space Needs

Projected needs
1. Space for potential new positions (+8 offices)
2. Improve Call Center
3. Improve storage capacity

Desirable, non-essential
1. Consolidate locations (+7 offices, +3 cubicles)
2. Recapture space (-2 offices)
3. Designate additional stalls in Continuing Ed parking lot (as needed)
4. Replace jersey barriers with low wall
5. Construct hosting center behind house

Options
1. Phase into the current Marketing Building?
2. Open to off-campus space for non-alumni departments
4YG – Critical Campus Partners

Culinary Arts
Dining Services
Internship program
Industrial / corporate relations
University Relations
Marketing Department
Parking services

Printing services
Facilities
Mail room
Scholarship office
IT / help desk
Thank you!

Questions?
Trends

### New Donors

<table>
<thead>
<tr>
<th></th>
<th>FY 2011</th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>FY 2014 Goal</th>
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</thead>
<tbody>
<tr>
<td>Goal</td>
<td>1200</td>
<td>1800</td>
<td>2500</td>
<td>3000</td>
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### Total Donors

<table>
<thead>
<tr>
<th></th>
<th>FY 2011</th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>FY 2014 Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>4000</td>
<td>5000</td>
<td>6500</td>
<td>8000</td>
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</table>
FY 2013-2014 Goals

National Development Outreach Engagements

<table>
<thead>
<tr>
<th></th>
<th>FY 2013</th>
<th>FY 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>700</td>
<td>1000</td>
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</table>

Emails Available

<table>
<thead>
<tr>
<th>CY</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60,000</td>
<td>65,000</td>
<td>70,000</td>
<td>90,000</td>
</tr>
</tbody>
</table>
Trends

Call Center Productivity

License Plate Revenue

FY 2011 | FY 2012 | FY 2013 | FY 2014

$0.00  | $20,000.00  | $40,000.00  | $60,000.00  |

FY 2011 | FY 2012 | FY 2013 | FY 2014

$0  | $2,000  | $4,000  | $6,000  |

FY 2011 | FY 2012 | FY 2013 | FY 2014

$20,000  | $18,000  | $16,000  | $14,000  |

FY 2011 | FY 2012 | FY 2013 | FY 2014

$10,000  | $12,000  | $14,000  | $16,000  |

FY 2011 | FY 2012 | FY 2013 | FY 2014

$10,000  | $12,000  | $14,000  | $16,000  |

FY 2011 | FY 2012 | FY 2013 | FY 2014

$10,000  | $12,000  | $14,000  | $16,000  |

FY 2011 | FY 2012 | FY 2013 | FY 2014

$10,000  | $12,000  | $14,000  | $16,000  |
Trends

Student to Student Campaign

<table>
<thead>
<tr>
<th></th>
<th>FY 2013</th>
<th>FY 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donors</td>
<td>693</td>
<td>840</td>
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</table>

Faculty-Staff Campaign

<table>
<thead>
<tr>
<th></th>
<th>FY 2013</th>
<th>FY 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Trends

Alumni Fair Attendance

Alumni Association Membership

FY 2010 FY 2011 FY 2012 FY 2013

FY 2011 FY 2012 FY 2013 FY 2014
Trends

Field Officer Visits

- FY 2011
- FY 2012
- FY 2013
- FY 2014

Gifts Over $10,000

- FY 2010
- FY 2011
- FY 2012
- FY 2013
Trends

Total Number of Cash Gifts & Pledges

Number of donors who have given 2+ years consecutively
Trends

Number of Pledges
with a 94% fulfillment rate

Number of Cash Gifts

<table>
<thead>
<tr>
<th>FY 2009</th>
<th>FY 2010</th>
<th>FY 2011</th>
<th>FY 2012</th>
<th>FY 2013</th>
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<tbody>
<tr>
<td>100</td>
<td>600</td>
<td>900</td>
<td>1200</td>
<td>1500</td>
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<table>
<thead>
<tr>
<th>FY 2009</th>
<th>FY 2010</th>
<th>FY 2011</th>
<th>FY 2012</th>
<th>FY 2013</th>
</tr>
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<tbody>
<tr>
<td>2000</td>
<td>2500</td>
<td>3000</td>
<td>3500</td>
<td>4000</td>
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