

# **Goals and Metrics:** Fund Raising for Endowment

**Faculty Senate**

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**September 21, 2010**

# Planning Recap

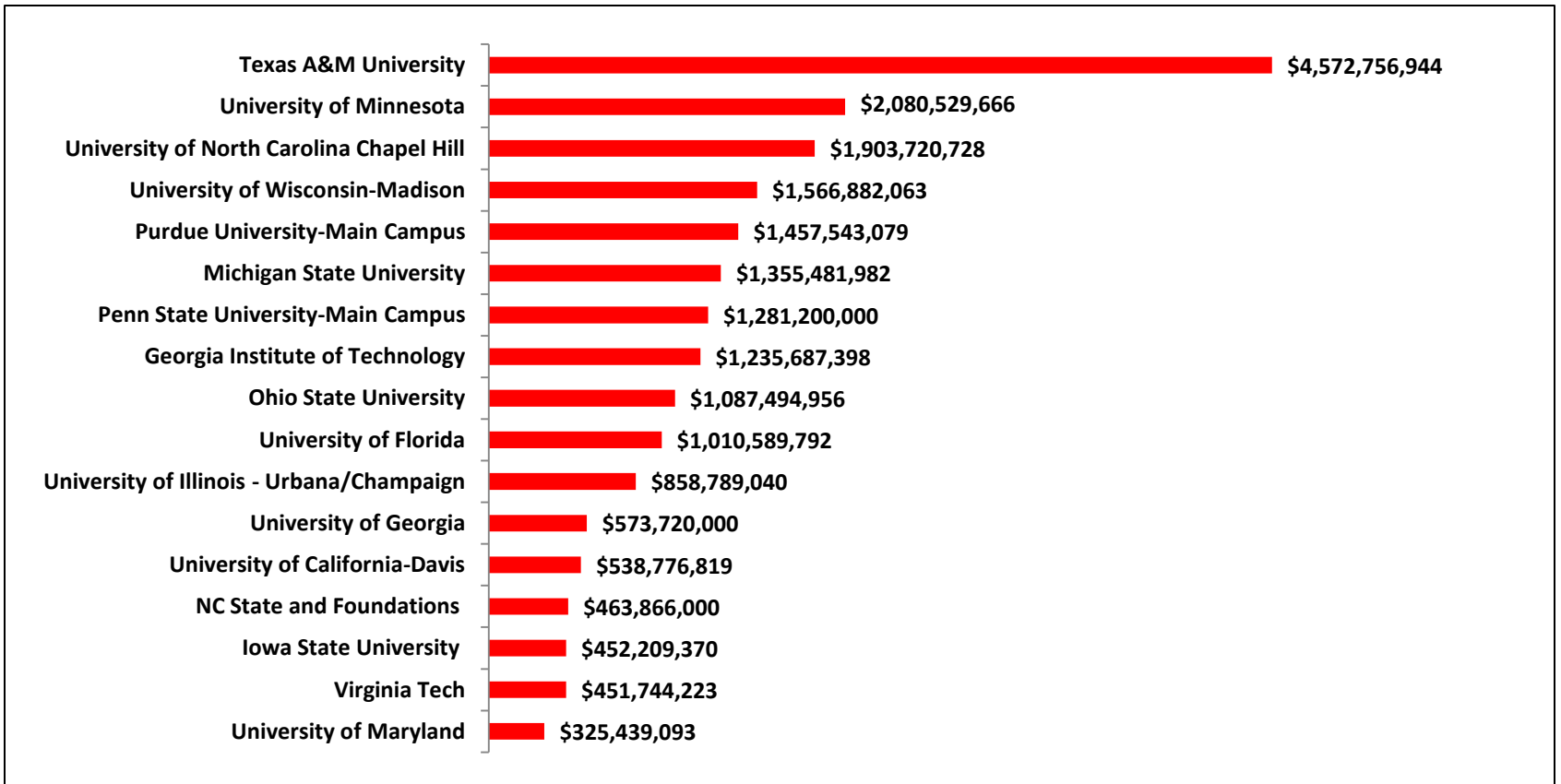
Start the silent phase of a \$1.5 - \$2.0 billion campaign on July 1, 2013, to be concluded June 30, 2021

Focus on building endowment – different campaign than Achieve!

Actively engage the deans, faculty, staff and volunteers in developing funding priorities

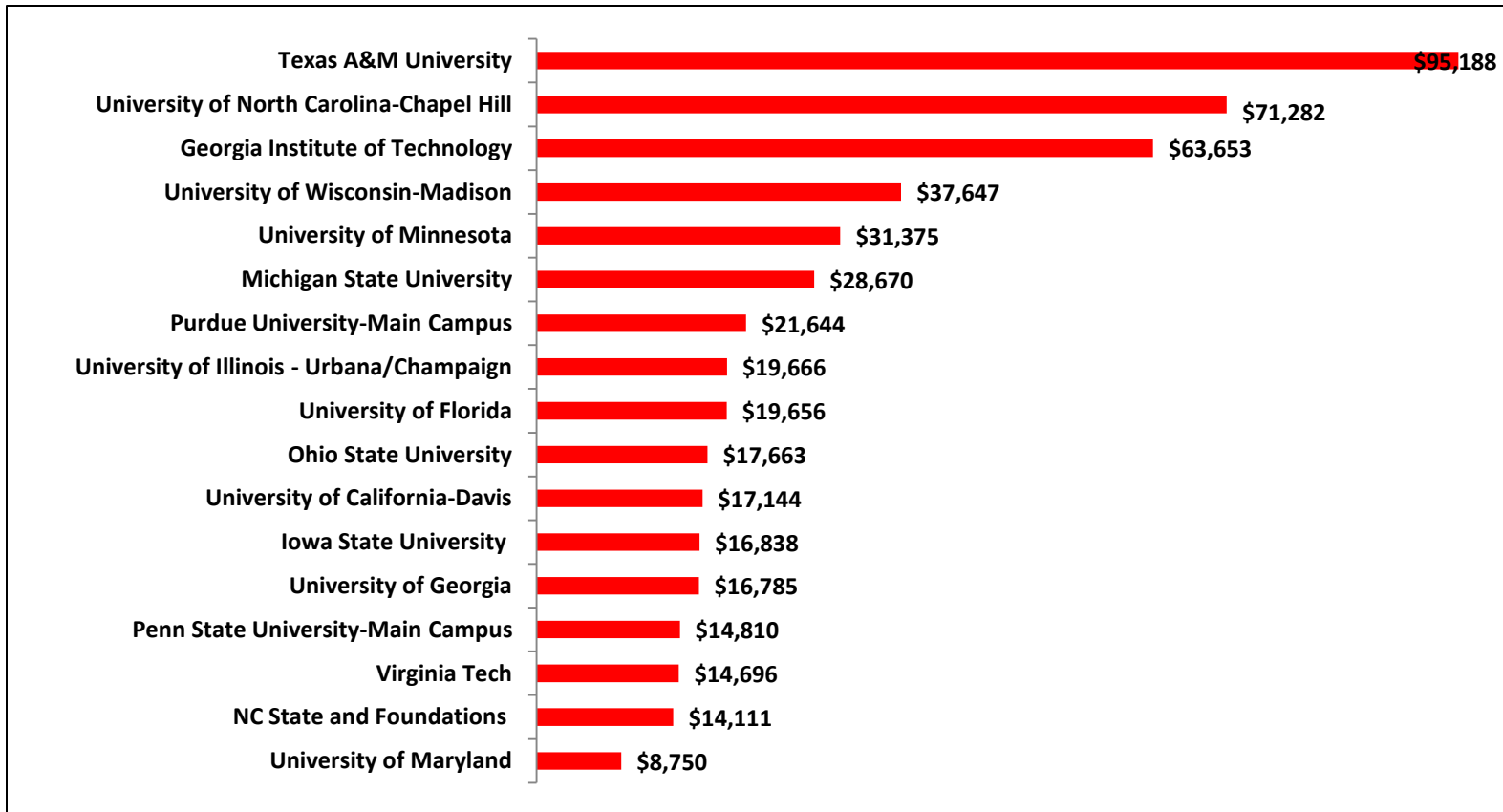
Significantly increase the number of donors to the campaign – 66,000 to 130,000+

# Endowment



FY 2009

# Endowment Per Student



FY 2009

# Endowment Update

## June 30, 2010

\$501 Million (estimate)

- \$19.8 Million – Athletics
- \$117 Million – Hofman Forest
- NCSIF Return – 11.44% vs. 10.9% (benchmark)

# Endowment Fund Raising Goals and Results

## Gifts and New Commitments

**FY'11**

**\$36.8M**

FY'10

\$25.1 M

FY'09

\$17.3 M

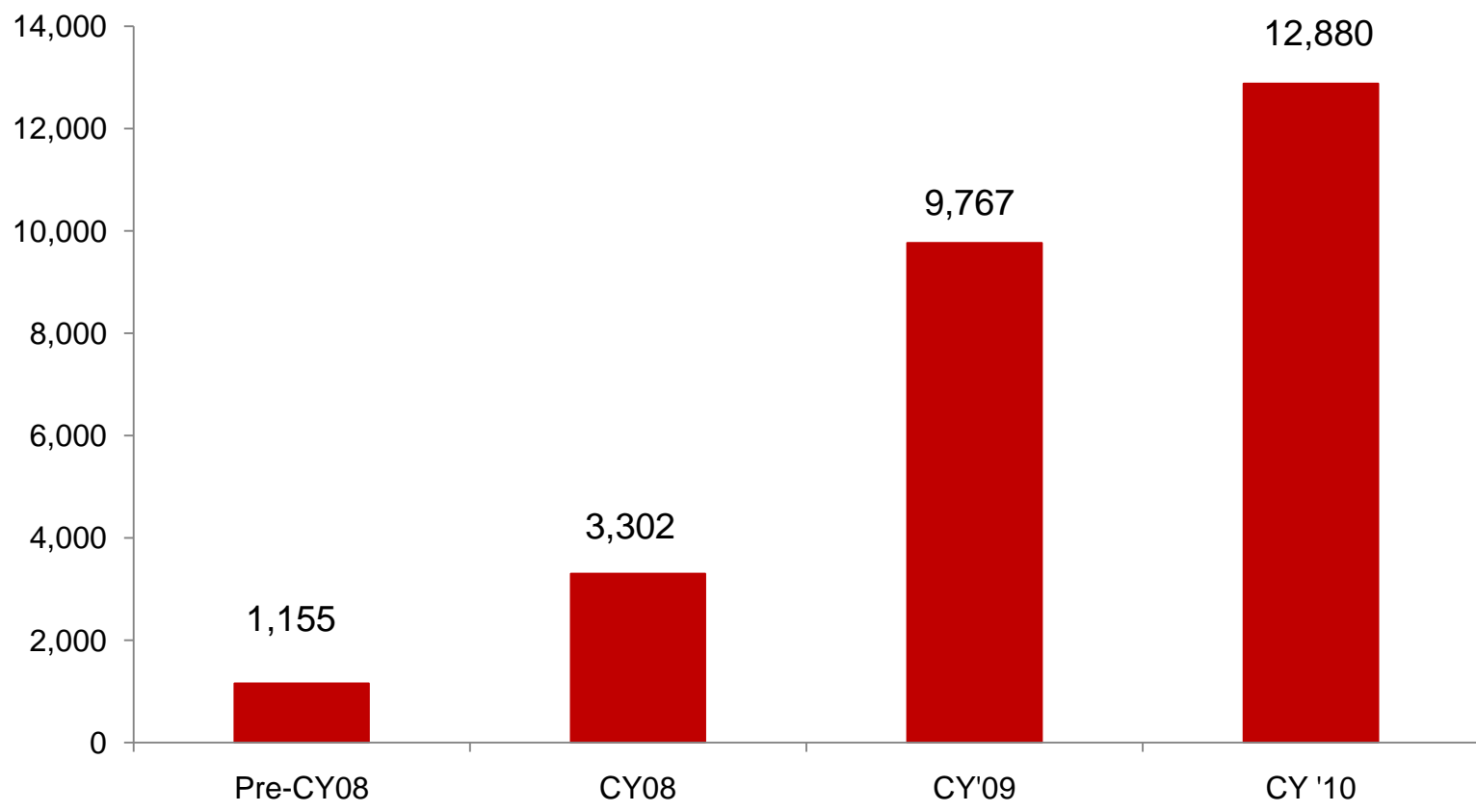
## Gift Receipts

**\$27.5M**

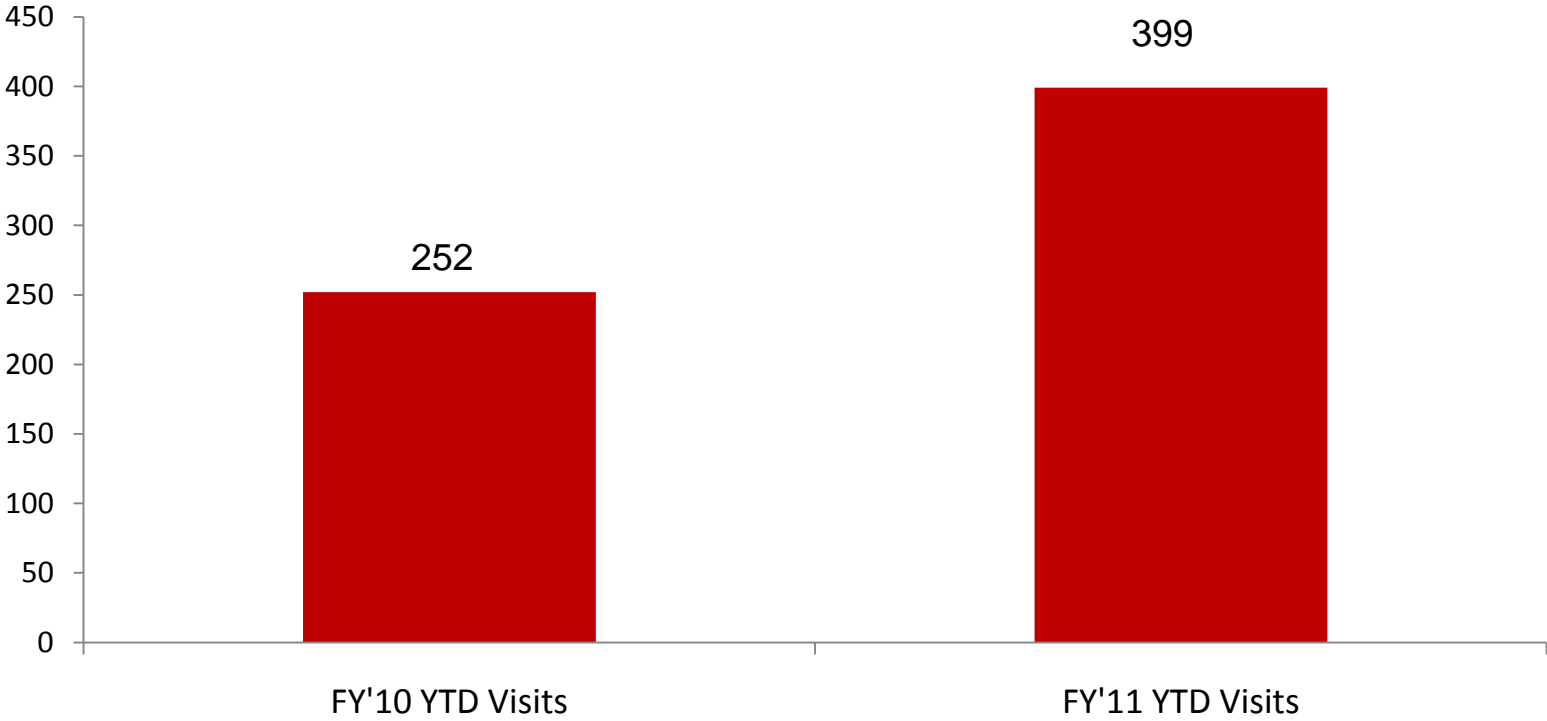
\$17.1 M

\$12.9 M

# Rated Donors and Potential Donors



# Increase Face-to-Face Visits by 186%



# Increase Fund Raising Staff – FY'11

Regional Major Gift Officers (2)

Planned Giving Officer

Major Gift Officer - Research/Graduate Education

Major Gift Officer - CHASS

Donor Relations Specialist

Prospect Researcher

# Bottom-Line

Double giving from \$90 million to  
\$180-200 million per year,  
with emphasis on endowment  
and fund raising priorities

# New Gift and Endowment Assessment Fees

Gift Assessment Fee of 5%

3% - 2% Split

Exemptions:

- Payments on pledges made prior to October 1, 2010
- Gifts to endowment and income funds for underwater endowments
- Gifts-in-Kind (unless monetized)
- Organizations that prohibit fees on gifts/grants

# New Gift and Endowment Assessment Fees

Additional 50 bp Fee on Endowments

25 - 25 bp Split

50 - 105 bp

# Questions?