NO REST for THE WEARY
Making the Most of Your Time Between Campaigns

July 2016

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ABOUT US

Raymond Happy
Principal & Managing Director

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Assistant Vice President

Thomas J. Mitchell
Vice President
Advancement
SESSION OVERVIEW

LANDSCAPE
- Higher Education Campaign Trends

UNIVERSITY OF FLORIDA
- Campaigns – Transitions

KEY CAMPAIGN CONSIDERATIONS
- Final Phase
- Post-Campaign
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Giving to higher education totaled $40.3B in 2015.

$11.6B – or 29% of total raised – went to 20 institutions.

Eight donations of $100M+ went to 4 institutions.

Alumni giving 10.2%, but percentage of alumni who donate is down.

Non-alumni giving 23%.

Source: Voluntary Support of Education Survey, Council for Aid to Education
CAMPAIGN TRENDS

- **Concentration of Gift Table:** Top 1% of donors gave 78% of gifts; the top 10% gave 94% of gifts
- **Ambitious Goals:** 34 $1B+ campaigns in progress in 2014
- **Going Public:** 31% of campaigns raised 60%+ of campaign goal during quiet phase
- **Campaign Length:**
  - Length of private university campaigns decreased from 6.4 years in 2011 to 5.9 years in 2013
  - Length of public university campaigns remains the same at 6.9 years
  - Average length of a campaign for $1 billion+ is 7.4 years

Source: VSE; CASE Campaign Report, 2013
ALLOCATION OF CAMPAIGN FUNDS

Source: CASE Campaign Report, 2013
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CAMPAIGNS

1. Embrace Excellence
   $392M

2. It’s Performance that Counts
   $851M

3. Florida Tomorrow
   $1.72B

4. Go Greater
   $3B Working Goal

Bridge Initiative – Preeminence
$945M
FOCUS OF SESSION

- **Florida Tomorrow**
  - $1.72B

- **Bridge Initiative–Preeminence**
  - $945M

- **Go Greater**
  - $3B Working Goal

Focus
Because of You
Oct 2010

Florida Tomorrow Ends
Oct 2012

Gratitude & Appreciation Tour
Oct - Dec 2012

Campaign Audit
Jan-June 2013

Preeminence Initiative
July 2013–June 2016

Go Greater Campaign Planning
July 2013 – Oct 2017
BECAUSE OF YOU

NATIONAL TOUR

Atlanta    San Francisco
Houston    Tampa
Jacksonville    Tallahassee
Miami    Washington DC
New York
Orlando
Pensacola
GAME PLAN

- 60 Days before
- GAME DAY
- 60 Days after
CHANGING THE NARRATIVE – VIDEO

http://www.floridatmorrow.ufl.edu/campaign.html
RESULTS OF BECAUSE OF YOU

- $720 Million
- 54 Endowed Chairs/Professorships
- 121 Endowed Scholarships
<table>
<thead>
<tr>
<th>Lagging Indicators</th>
<th>Goal</th>
<th>YTD</th>
<th>% of Goal</th>
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<tbody>
<tr>
<td>Total Commitments</td>
<td>Goal</td>
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<td>% of Goal</td>
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<td>Total</td>
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<tr>
<td>Cash</td>
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<table>
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<tr>
<th>Leading Indicators</th>
<th>Goal</th>
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<tr>
<td>Meaningful Contacts</td>
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<td># of Proposals Presented</td>
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CELEBRATION

Seeking donor regalia photo.
SCHOLARSHIPS ...
FLORIDA TOMORROW CELEBRATION
GRATITUDE AND APPRECIATION

- **599** Gator Bowls delivered
- **651** new names
- Process generated **$12M** in new gifts

• **Thank YOU!**

• **Do you know anyone?**

• **Consider a year-end gift?**
PRESIDENTIAL IMPACT AWARD
SESSION OVERVIEW

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POST CAMPAIGN
• Review
• Planning
POST-CAMPAIGN ASSESSMENT

Framework for Preparing for Next Campaign
KEY ASSESSMENT INSIGHTS

1. Prospect Pipeline
2. Regional Strategy
3. Messaging
4. Leadership Engagement
5. Mega/Principal Giving
6. Volunteers
7. Finance
8. Staffing
9. Stewardship
10. High Potential Colleges and Units
# OPPORTUNITIES

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<tr>
<th>Pipeline</th>
<th>Regional Strategy</th>
<th>Messaging</th>
<th>Leadership</th>
<th>Mega/Principal</th>
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<tbody>
<tr>
<td>Volunteers</td>
<td>Finance</td>
<td>Staffing</td>
<td>Stewardship</td>
<td>Six Areas</td>
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<tr>
<td>Gift Planning</td>
<td>Big Ideas</td>
<td>Prospect Management</td>
<td>Partnerships</td>
<td>Information Technology</td>
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LEADERSHIP COUNCIL

**What:**

Cross-section of Advancement Senior Leadership Team meeting bi-monthly to discuss major strategic issues and campaign readiness.
### LEADERSHIP COUNCIL

<table>
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<tr>
<th>2013</th>
<th>2014</th>
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<tbody>
<tr>
<td>Oct</td>
<td>Nov</td>
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<tr>
<td>Pipeline</td>
<td>Regional</td>
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- Designate **Initiative Leader**
- Set **goals** for campaign readiness
- Establish **metrics**
- **Report** regularly
In 2013, the Florida Legislature designated UF as the state’s preeminent institution.

— 92 new nationally recognized faculty members

— Fundraising goal of $800M
SUSTAINING MOMENTUM

- $800M Preeminence Initiative
- Retaining-Developing-Recruiting Faculty
- $945M
PEDRO SANCHEZ
MOMENTUM

- New Visionary President – Quest to achieve top 10 status ($1M)
- Tenured, well-respected Provost ($1M)
- Collaborative, committed deans and directors (100% participation)
- Passionate alumni and friends (Gator Nation)
- Successful campaign history – with new emphasis on Mega Gifts
RAISE YOUR VOICE - VIDEO
OPPORTUNITIES

- Big Ideas—Big Gifts
- Storytelling—Image Reputation
- Alumni—Engagement
PRE-CAMPAIGN: THIS IS OUR CAMPAIGN

- Communicating with Stakeholders
  - Board of Trustees
  - Foundation Board
  - Alumni Association Board
  - Senior Cabinet
  - Vice Presidents
  - Deans
  - Directors
  - Faculty
  - Students
  - Staff

- $20M+
- $1M+
- $100K+
- $10K+
- <$10K
THANK YOU