University Advancement Committee  
Tuesday, September 27, 2022  
12:00 pm  
Chancellor’s Boardroom, Mossman Building

Discussion Item

UAC – 4 Understanding Types of Gifts and Annual Giving Strategy
4.1 – Gifts Summary Presentation

Background Information

Associate Vice Chancellor Kevin Williamson and Rachel Kelly, Director of Advancement Communications, will give a presentation on the different types of gifts that can be made by a donor. The presentation will include Annual Giving, Leadership Gifts, Major Gifts, and Planned Gifts. It will also include the Annual Giving strategy for FY23.

Beth Fischer  
Vice Chancellor, University Advancement
TYPES OF GIVING
+ ANNUAL GIVING STRATEGY

P. Kevin Williamson, Associate Vice Chancellor for Development
Rachel Kelly, Director of Advancement Communications
THE DONOR PIPELINE:

- Annual Giving
- Leadership Annual Giving
- Major Giving
- Planned Giving
ANNUAL GIVING:

- $1 - $24,999
- The foundation for all University fundraising efforts
- Current use
- Often unrestricted
- Acquisition and Retention focused
- Provides a stable source of support for the University
LEADERSHIP ANNUAL GIVING:

• $1,000 - $24,999
• Donor Experience Officers
• Increase ability for personal contact, expanding the base of alumni support
• Help to direct dollars to meet the goals of the donor and the institution
• Ask for upgraded gifts
MAJOR GIFTS:

• $25,000 +
• The institution’s largest contributions
• Usually, high-level engagement with the institution + affinity and capacity
• Support usually targeted and specific
• $50,000 to create an endowment
• Pledge payments accepted over 5 years
PLANNED GIFTS:

• Enables philanthropic individuals to make larger gifts than they typically could with cash
• Any level of gift is accepted as a planned gift
• There are several vehicles through which a planned gift can be made
  • Stocks/Bonds
  • Real Estate
  • Retirement Assets
  • Life Insurance
  • Cash
GIFTS FROM ENTITIES:

- Foundations
- Corporations
- Donor Advised Funds
- Family Foundations
- Employer Matches
- Any gift amount from a non-individual can be accepted
ANNUAL GIVING IN FY 23
A MULTI-PHASE INITIATIVE EACH QUARTER

Warming, Solicitation, Stewardship

1. Back to School | Student Success | Fall
2. End of Year | Academic Units | Winter
3. Believe in the G | Campus-Wide | Spring
4. End of Fiscal Year | Unrestricted Funds | Summer
ADDITIONAL INITIATIVES

- Homecoming Champions
- Crowdfunding
- Giving Tuesday
- Senior Cords
RAISING THE BAR

• Spartan Storytellers
• SMS Outreach
• Digital Advertisement (remarketing)
• Custom Giving Pages
• Digital Wallets
• Recurring Gifts
BELIEVE IN THE G

MARCH 14 – 15, 2023

• Cross-campus effort
• Digital crowdfunding + in-person activations
• Primary goal is participation: Over 1,800 donors
• Over $1M
• Double # of Ambassadors to 80 (Raised $21,459 in 2022)
• Seeking Match + Challenge Donors (Raised $393,934 in 2022)