



Item: CG: I-1

COMMUNITY AND GOVERNMENTAL RELATIONS COMMITTEE

Tuesday, October 15, 2013

SUBJECT: UPDATES

PROPOSED COMMITTEE ACTION

Information only, no action needed

BACKGROUND INFORMATON

- a. Advancement/Fundraising:** Review of fundraising update and initiatives
- b. Alumni Relations:** Outreach, Board and Talon Award Winners
- c. University Relations:** Update on Legislative Outreach
- d. FAU Foundation:** Foundation update and Board Members

IMPLEMENTATION PLAN/DATE

N/A

FISCAL IMPLICATIONS

TBD

Supporting Documentation: PowerPoint presentation

Presented by: Joanne Davis

Phone: 561-297-3015
Cell:

Community Engagement

Report to the Board of Trustees

October 2013

Presentation Overview

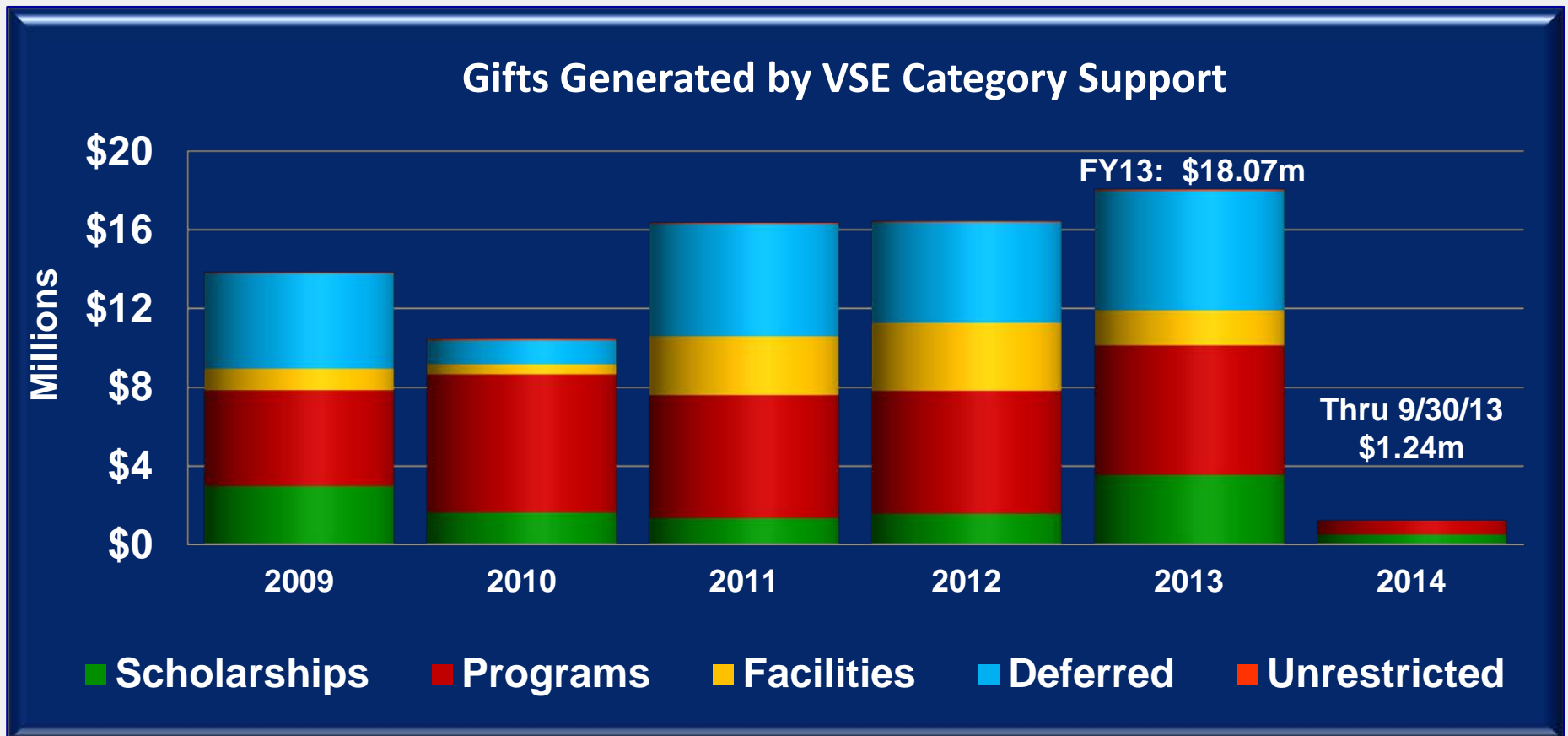
- 1. Advancement**
- 2. Alumni Relations**
- 3. University Relations**
- 4. FAU Foundation**

advancement

FAU Fundraising Update

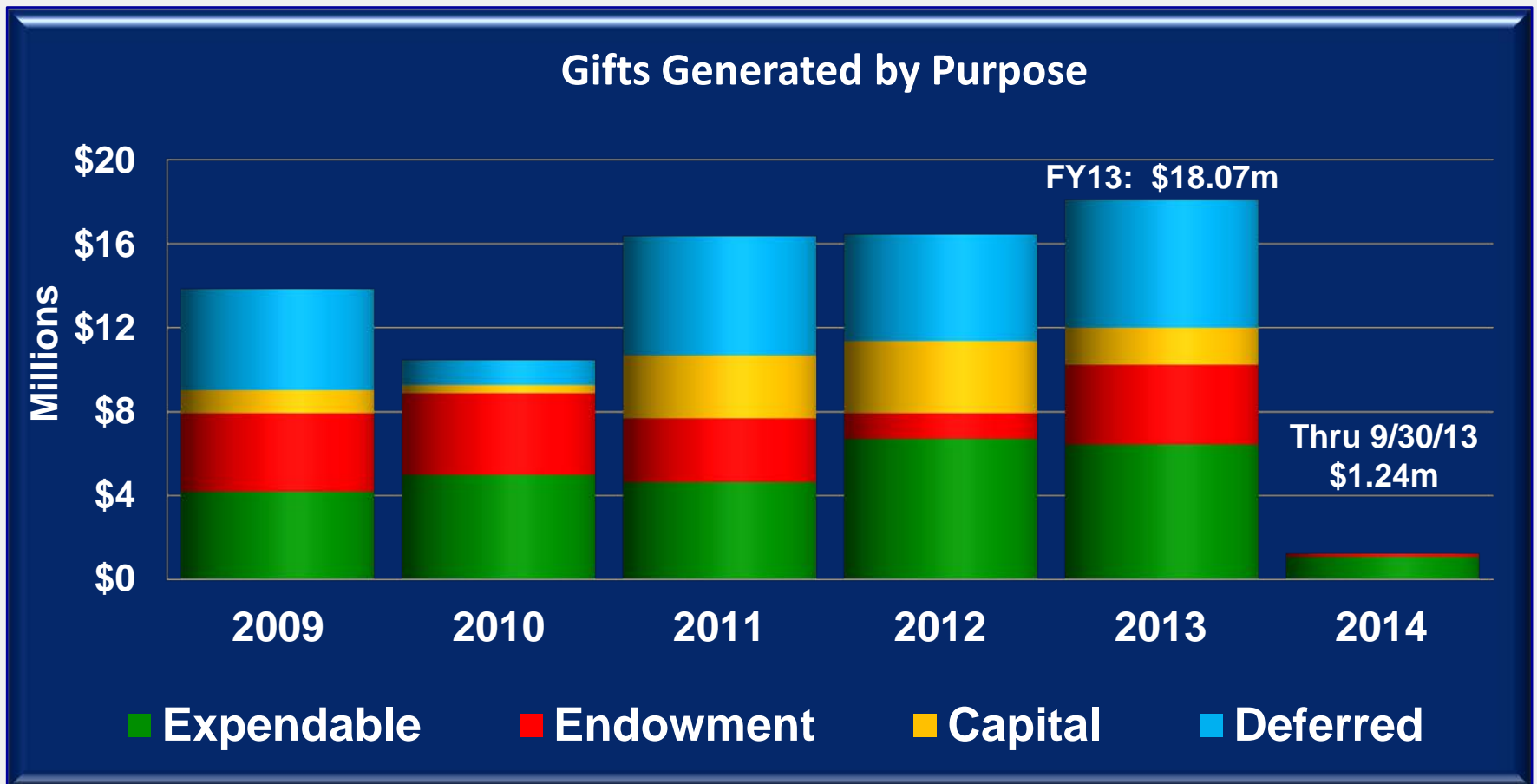
Advancement

FY2014 Fundraising Goal: \$20 million



Note: includes no State Match dollars

FY2014 Fundraising Goal: \$20 million



Development Initiatives

Advancement

- Principle and Planned Gifts Programs
 - Initiatives
- Development Officer Reporting and Accountability
- Annual Giving
 - Faculty Staff Campaign
 - Student Philanthropy Council
 - Phonathon

- **Target Analytics Results**
- Alumni Demographics Beta [Website](#)

Results Returned:

- 1. Annual Giving Likelihood Score**
the *likelihood* of the constituent to *make a gift*
- 2. Major Giving Likelihood Score & Target Gift Range**
an *assigned gift range* that presents a suggested “ask” amount for a *one-year period*
- 3. Principal Giving Segmentation**
an *assigned tier (1-4)* that presents a minimum campaign pledge “ask” amount for a *one-year period*
- 4. Giving Score**
segments constituents into four unique groups on who is most likely and capable to give



Target Analytics: Annual Giving Results

Advancement

Prospects are segmented into **action groups** for annual giving, based on **how likely** they are to make an annual gift, as well as their **individual capacity**:

- **Best Prospects:** target for repeat gifts, at specific amounts
- **Second Tier :** less likely to be high value; solicit if budget / time allows
- **Low Scoring:** consider minimizing investment in these individuals

Target Gift Range

Annual Giving Likelihood Score	\$1 - \$50	\$51 - \$100	\$101 - \$250	\$251 - \$500	\$501 - \$1,000
Excellent (AGL 901-1000)	0	8	37	231	362
Very Good (AGL 801-900)	12	117	248	747	515
Good (AGL 501-800)	5,743	18,030	14,066	9,425	7,939
Low Scoring (AGL < 501)	45,557	44,703	13,527	4,563	1,976

Target Analytics: Major Giving Results

Advancement

- Individuals likely to make a major gift are designated as **excellent, very good or good**.
- Their major gift inclination and capacity score should be used to **evaluate their relationship to your organization**.
- Target gift range category should be the **basis for your initial ask amount** and guide individual solicitation plans.

Target Gift Range

Major Giving Likelihood Score	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$10,000	\$10,001-\$25,000	\$25,001+
Excellent (MGL 901-1000)	203	386	490	280	65
Very Good (MGL 801-900)	699	339	85	11	1
Good (MGL 701-800)	620	141	22	8	1



Target Analytics: Principal Giving Results

Advancement

- Total file assessment to identify **top tier prospects** for fundraising initiatives
- **Combines both inclination and capacity** to give over a one-year period
- Scored prospects should be considered the **highest priority for major giving** prioritization and prospecting purposes



Score Description	Annual Gift Dollar Range	# Prospects
Tier 1	\$1 Million+	35
Tier 2	\$750K - \$1M	198
Tier 3	\$500K - \$750K	251
Tier 4	\$250K - \$500K	347

Target Analytics: Giving Score

Advancement

Target Analytics looked at hundreds of external demographic and financial characteristics and combined that data with historical giving information to build the score. The score is used to **focus cultivation and solicitation efforts** on who is most likely and capable to give.

> Likelihood to give >



> Capacity to give >

alumni relations

- New Board Leadership
- New Corporate Membership Program
- Talon Awards – October 30

New Board Leadership

- Jorge Cabrera – Chair
- Ben Dickinson – Vice Chair
- Tiffany Weimar – Secretary
- Mike Lansing – Treasurer
- Craig Richman – Immediate Past Chair

New Corporate Membership Program

(Launched in October 2013)

- Membership includes one time use of the Marleen & Harold Forkas Alumni Center for corporate function
- Named sponsor at Alumni Association Signature events
- Special priced tickets to Athletic and Cultural Events for corporate employees
- Discounts on Career Fair tabling
- Discount on Ropes Course

Membership price: \$5,000 annually

- 3 companies have already purchased memberships

Talon Awards – Wednesday, October 30



Edith Stern '68 - **Alumni Award Recipient**

IBM Distinguished Engineer

- Managed the research joint programs for Tivoli
- Master Inventor with 126 issued U.S. patents
- MS in Mathematics from Michigan State University
- Youngest grad in FAU history (age of 15)



Eric Kelly '11 - **President's Award Recipient**

Executive Vice President of Quantum Foundation

- Former Regional Vice President Allegany Franciscan Ministries
- FAU College of Design & Social Inquiry graduate
- BS in Communication from FSU; attended Moody Theological Seminary

university relations

University Relations

Legislative Outreach

- Establish relationships with the 600+ elected and appointed officials
- Accomplished since April 16, 2013 BOT meeting:
 - 450 meetings and events with elected officials, chambers, and economic development organizations
 - 23 Campus based events for elected officials-tours and legislative appreciation events
 - Internship program for FAU students in elected officials offices
- University's 2014 State Legislative Agenda
- Presentations by President Crudele to the City Councils and FAU campuses

fau foundation

- **Investment returns FY13:**
 - Endowment \$189.3 million, as of June 30, 2013, increase of \$17M from 2012
 - Endowment returns FY13: 11.8% (Harvard earned 11.3%)
 - Net Assets as of June 30, 2013: \$226 million, increase of \$18.6M from 2013
- **Audit FY2013:** clean with no findings or management letter
- **Invitation to Negotiate for Investment Advisory Services**
(closed on July 1, 2013)
- **New hire:** Assistant Director of Finance, Georgia Hill

- **FY2014 Officers**

 - Bruce Allen, Chairman

 - Jay Weinberg, Vice Chair

 - Brett Greenberg, Secretary

 - Patricia McKay, Treasurer

- Retreat October 18 & 19 at Jupiter Beach Resort & Spa
 - focus on Board fundraising

- Advisory Board initiative
 - Define role in raising funds
 - Align bylaws, expectations and diversity
 - Engage and recruit new members

Board Member Achievements

Gary Lesser – Received the “Business of Character Award” by the United Way of Martin County and Business Development Award

Kathleen Grace – Her book, “Prince Not So Charming: A Romantic Tale of Financial Independence” is now available on Amazon.