



NEWCOMERS SESSION

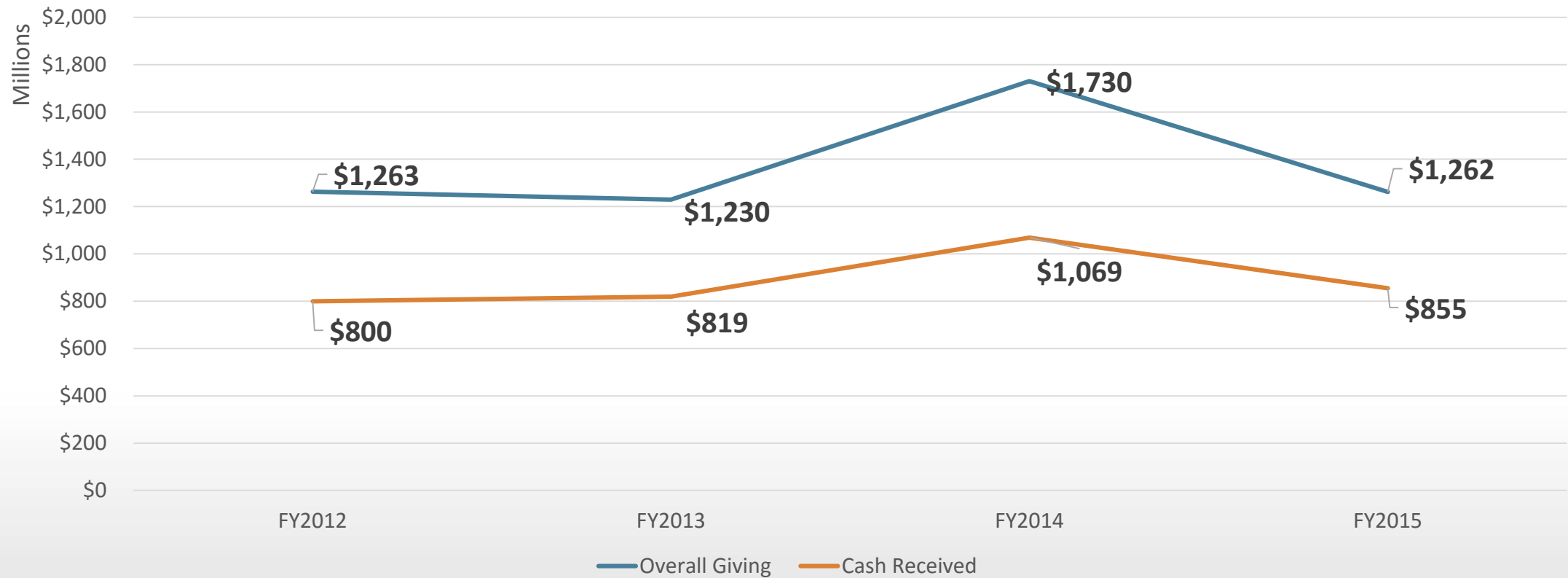
Development and Gift Planning Services Center for Enhancing Philanthropy

Philanthropy's Impact

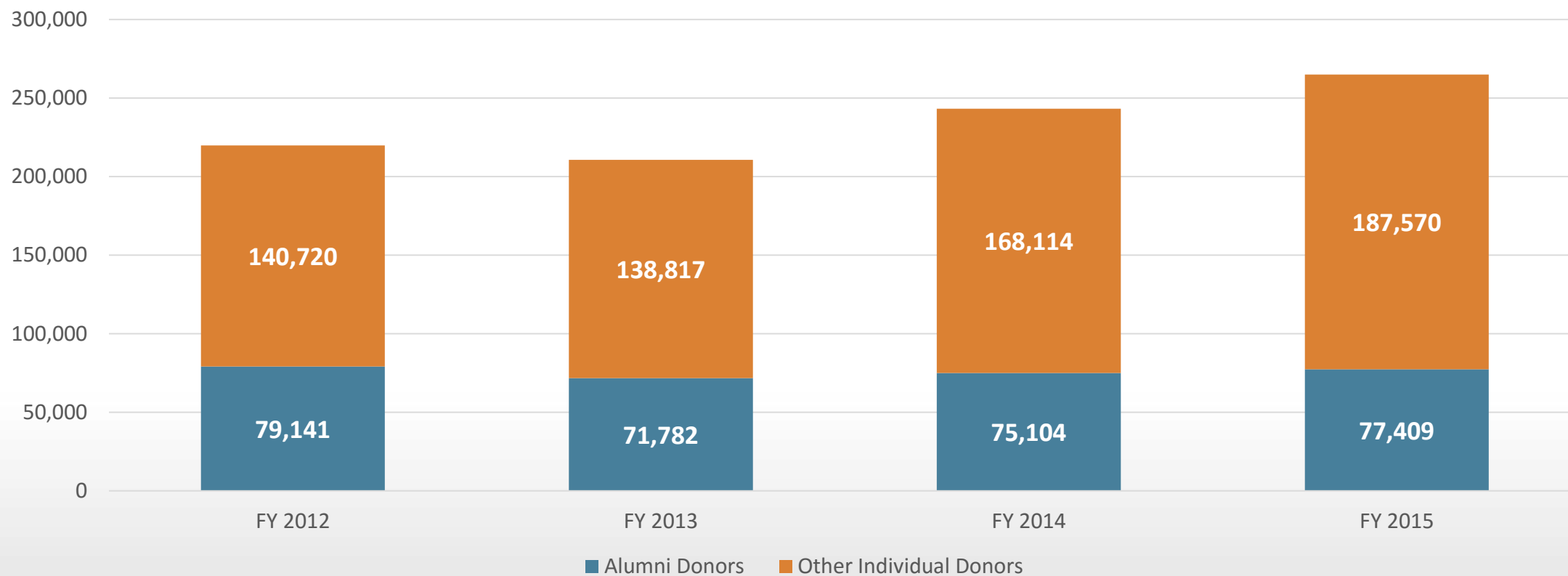
Development and Gift Planning Services

Center for Enhancing Philanthropy

Collective Results University of Texas Institutions FY2012-FY2016



Collective Results University of Texas Institutions - Individual Donors FY2012-FY2016



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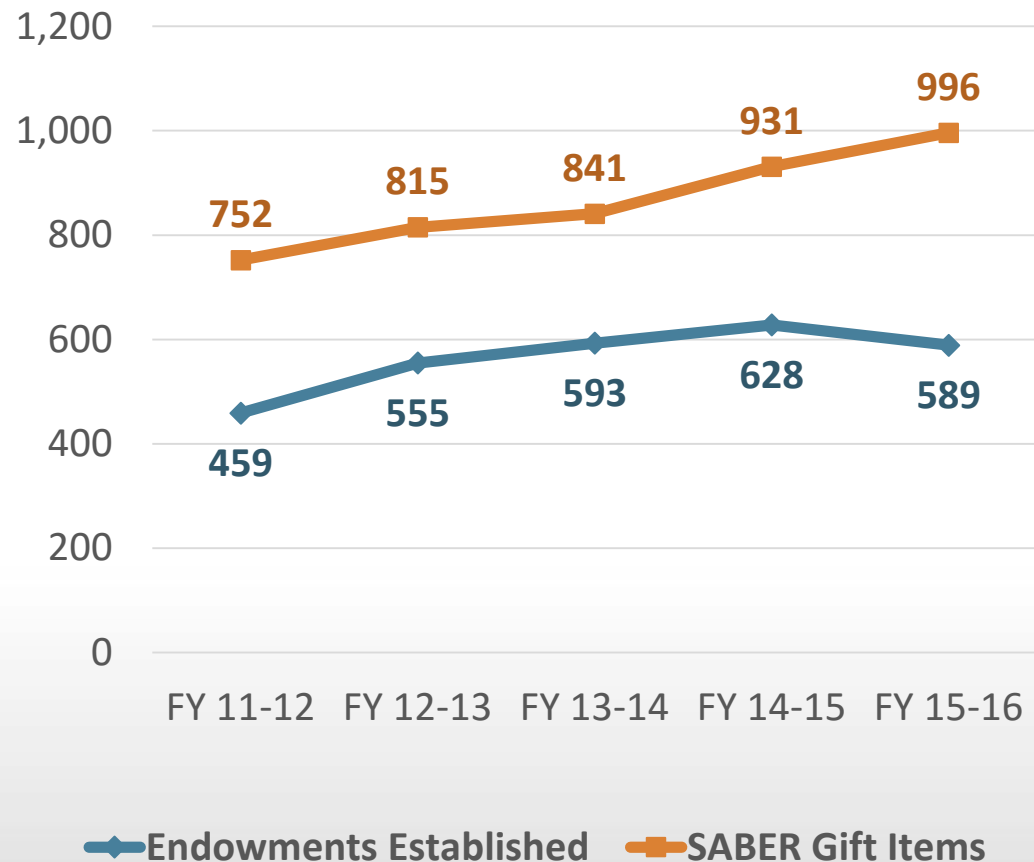
Development and Gift Planning Services

Mission is twofold:

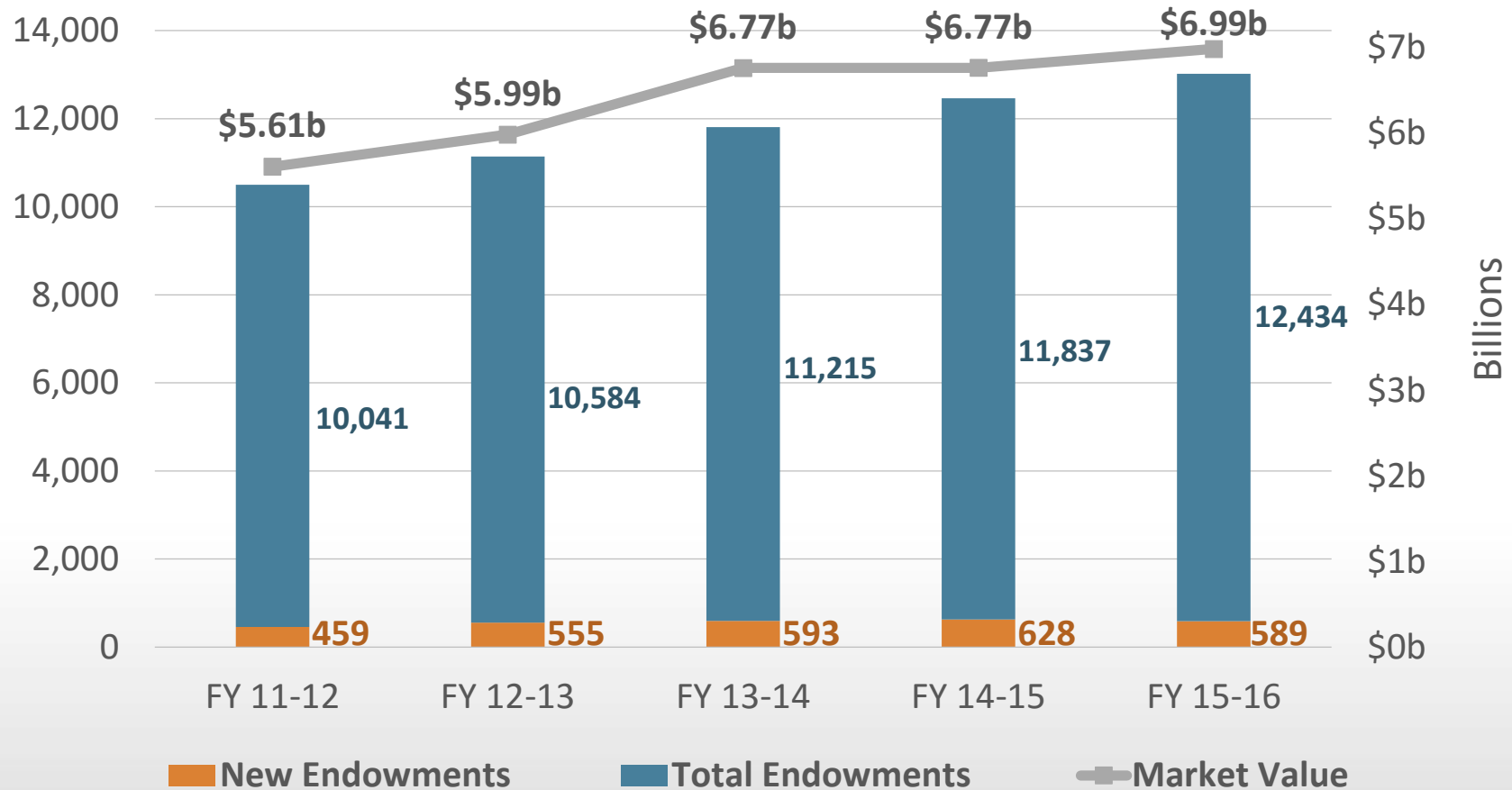
- To support the UT institutions and their philanthropic endeavors, providing expertise and assistance in managing complex gift opportunities
- To seek support for the Chancellor's initiatives and to build and strengthen relationships while promoting a greater understanding of the UT System's impact across the state

Gift Acceptance

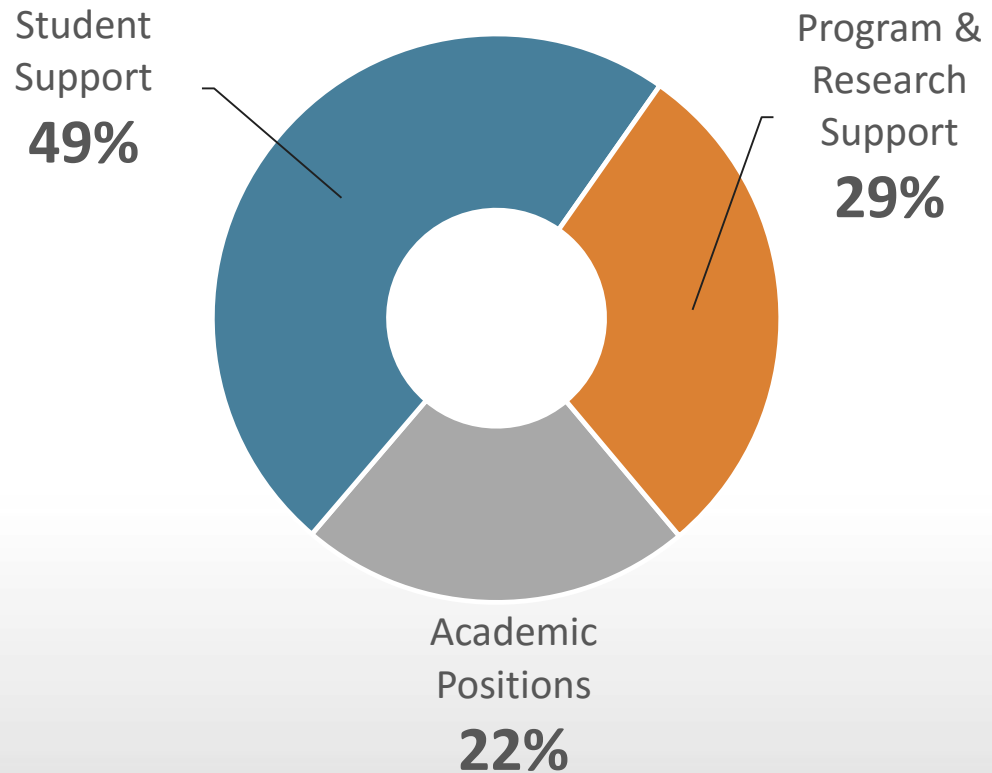
- Regents' Rule 60101: Acceptance and Administration of Gifts
- UTS 138 Gift Acceptance Procedures
- Agreements – a necessary evil
- Approvals – Nonconforming vs. Conforming



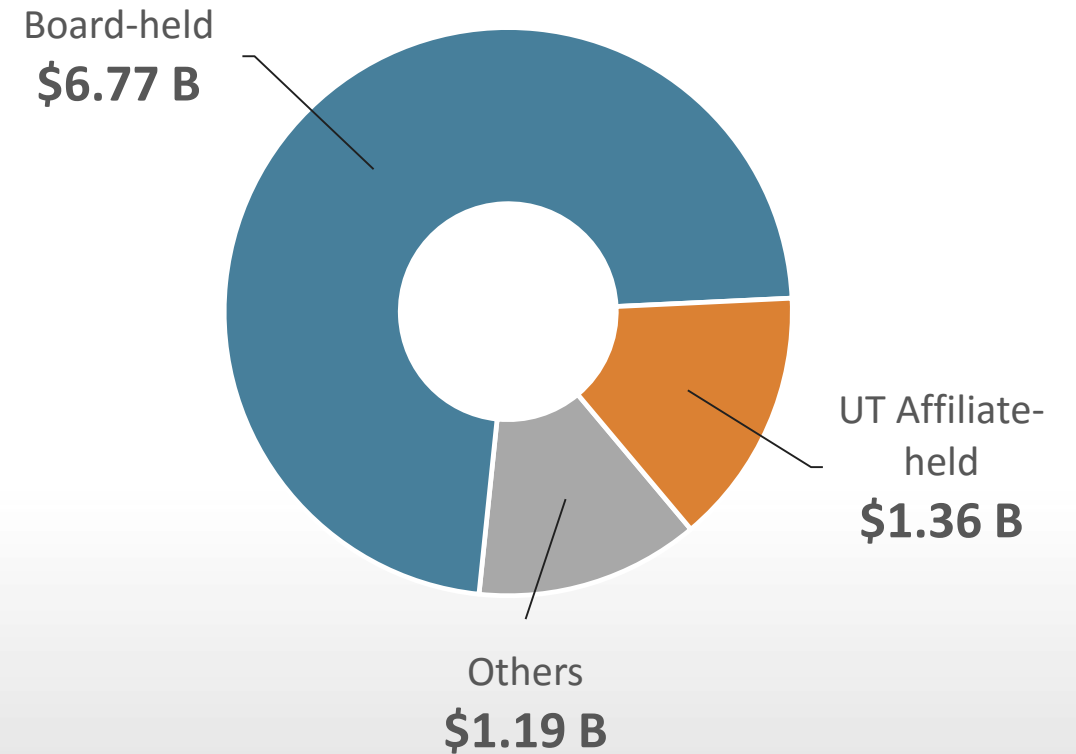
Endowment Administration



Endowment Purposes



Market Values



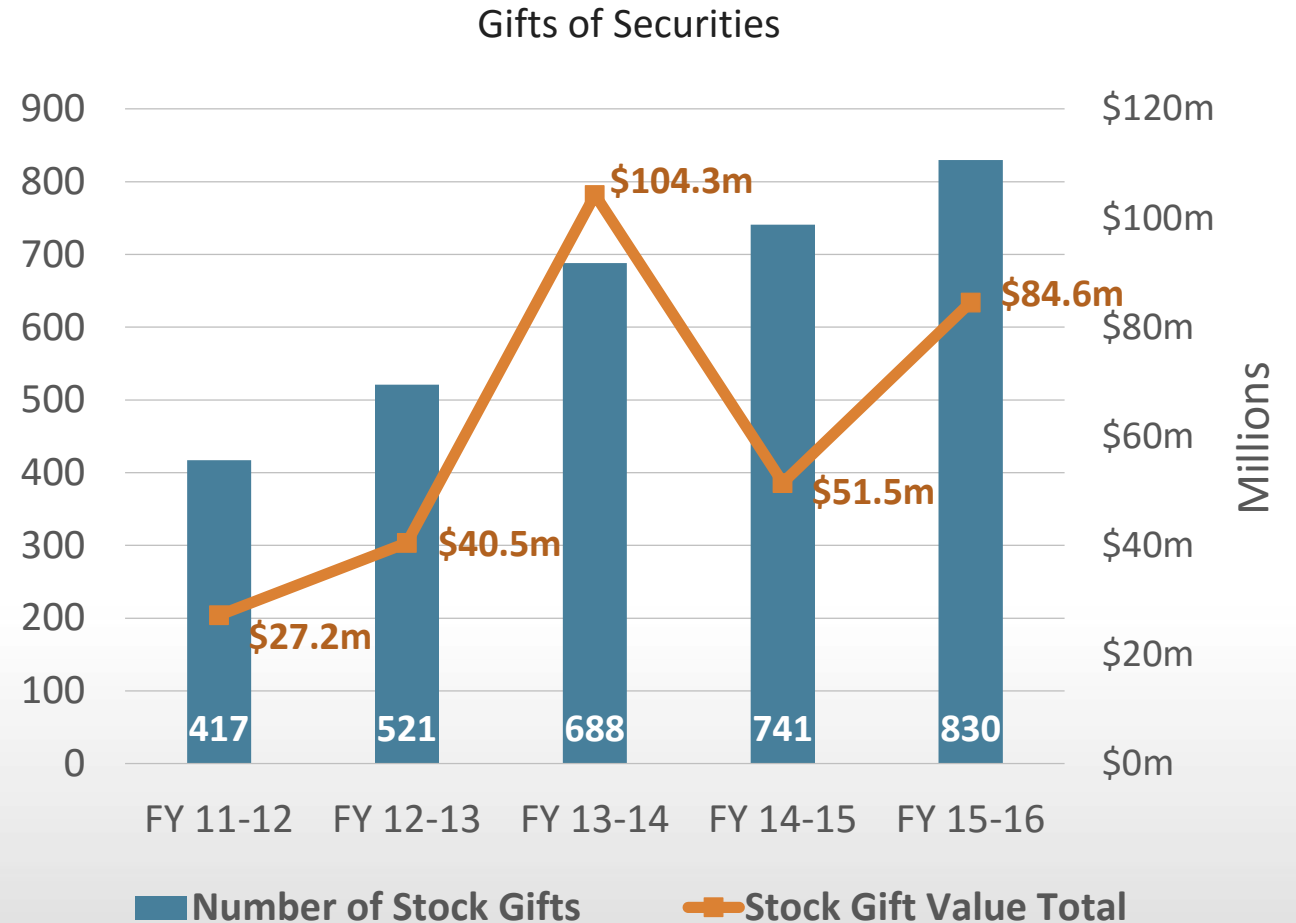
Endowment Compliance

- Risk assessment
- Monitoring plan
 - Inappropriate expenditures
 - No expenditures*
 - Excessive accumulations*
 - Fully-funded endowed academic positions unfilled for 24 months or longer*
- Training
- Reporting

**Without justifiable reasons*

Non-Cash Assets

- Securities
- Real Estate
- Mineral Interests
- Works of Art
- Closely-held Business Interests
- Other assets



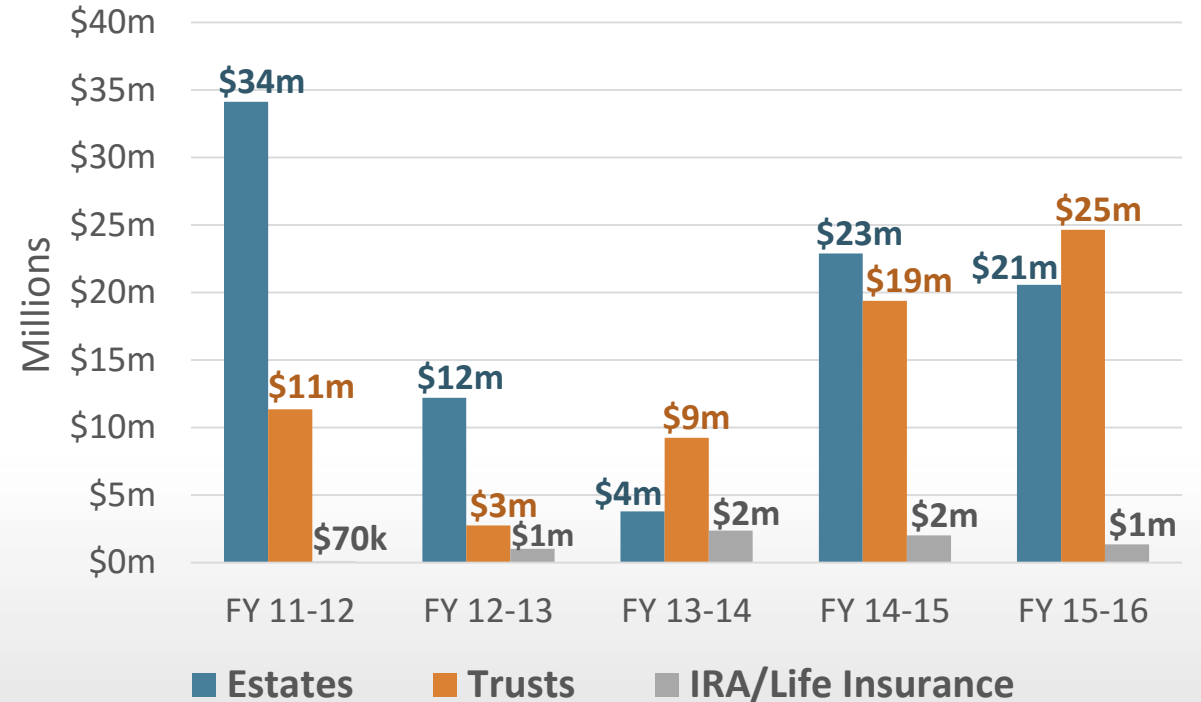
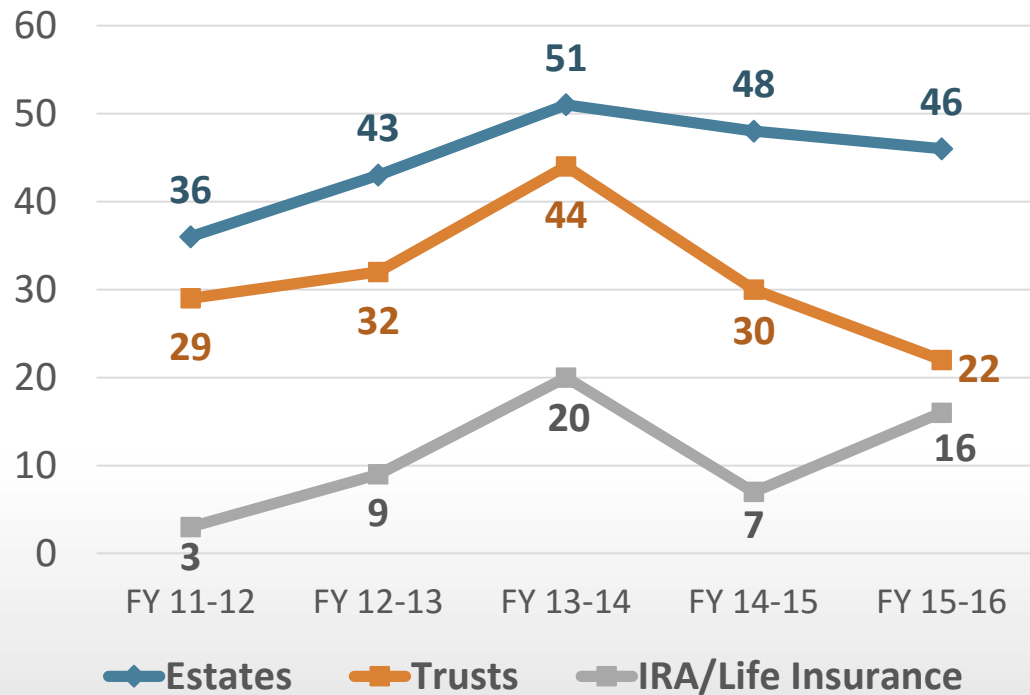
Naming Policy - Regents' Rule 80307

- Prominent Facilities and Prominent Programs
- Less Prominent Facilities and Less Prominent Programs
- Naming of Streets
- Honorific
- Gift Related
- Corporate
- Approvals

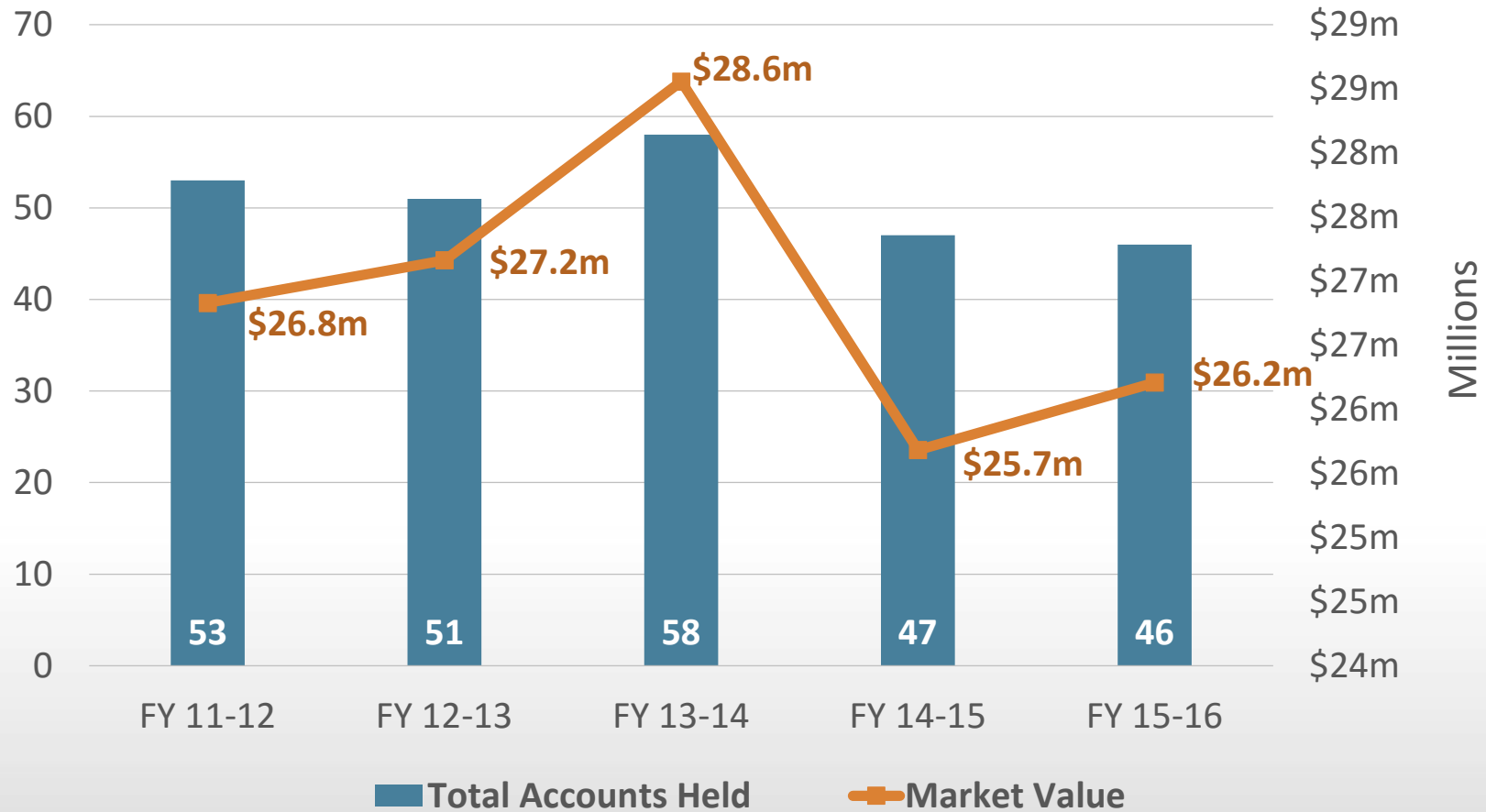
Planned Giving

- Wills and Bequests
- Charitable Remainder Trusts Held and Administered by the Board
- Charitable Trusts Held and Administered by External Trustees
- Life Insurance Administration
- Remainder Interests in Real Property with retained Life Estate
- Gifts of Non-Cash Assets

Estate, Trust, and IRA/Life Insurance Administration



Board-Held Charitable Remainder Trusts



Development Operations

- Online Resource Guide
- Acknowledgements for extraordinary philanthropy
- Voluntary Support of Education Survey (VSE)
- Records Management
 - Repository for endowment files; online access
 - Raiser's Edge and NetCommunity

Chancellor's Council

- Chancellor's Council Executive Committee
- Centurions



The University of Texas Foundation

- Charitable gift annuities
- Gifts specifying 501(c)3 designation
(grants, matching gifts, other gifts)
- Donor advised funds
- Special endowments
- Unconventional gifts

Center for Enhancing Philanthropy

utsystem.edu/cep

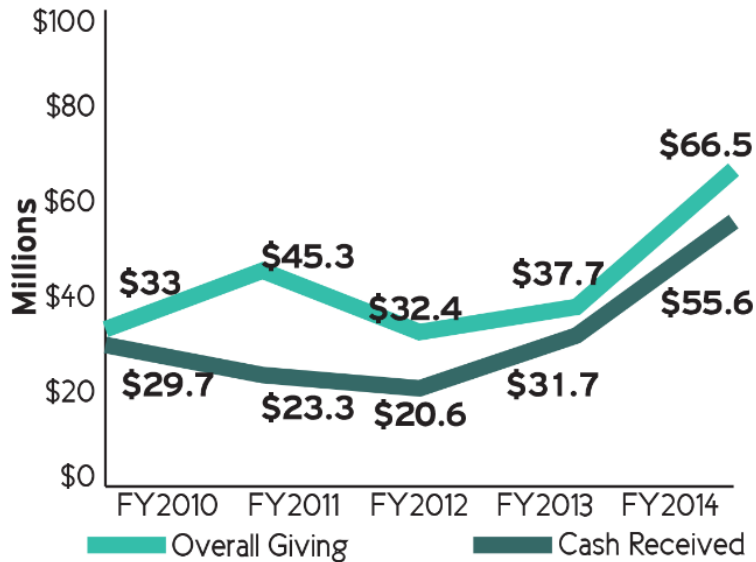
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Assessments and Analysis

- System wide – BOR and Chancellor Reports
 - Strength in Numbers
 - Funding Development
- Institutional – Development Review
- Action Plans – Customized plans – organizational, program specific, metrics

Overall Giving and Cash Received

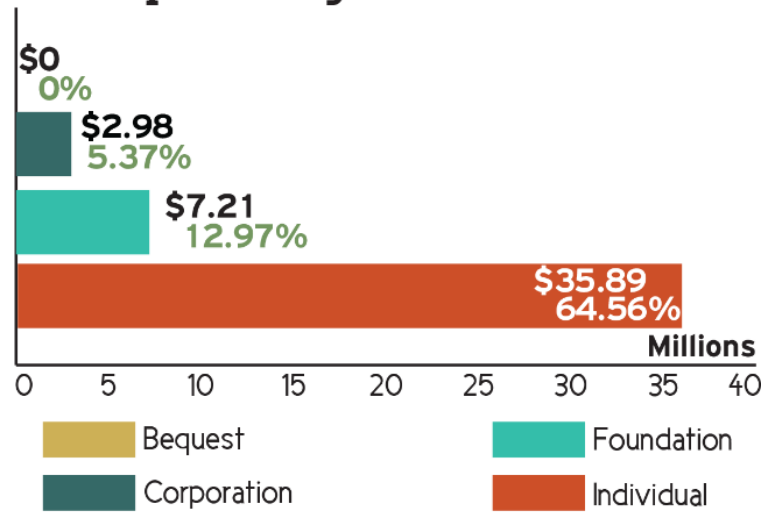


Overall giving and cash received reached record highs in FY2014

Cash received has increased 263% since FY2005

██████ reports \$273M raised on \$200M goal

Top 12 Gifts with percentage of cash received



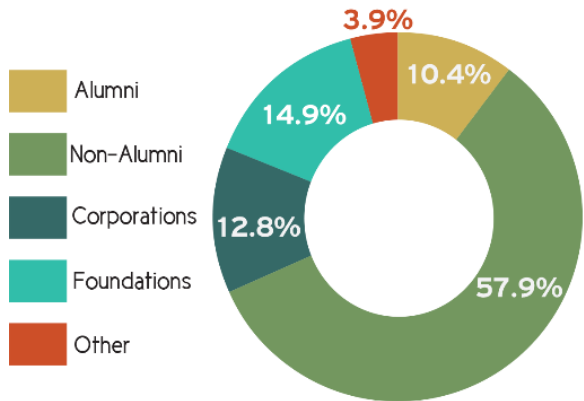
Largest three gifts from each of the above categories totals 83% of all cash received


Gifts from individuals are the leading source of large gifts

No large gifts from bequests in FY2014

██████ - Redacted

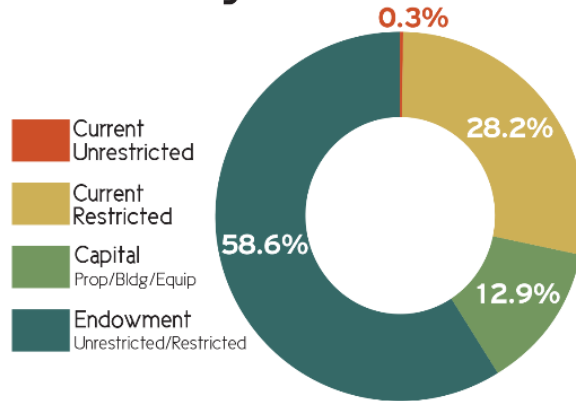
Source of Gifts



68.3% of giving from individuals in FY2014 exceeds  five year average of 41%

Non-alumni donors counted for more than half of all giving

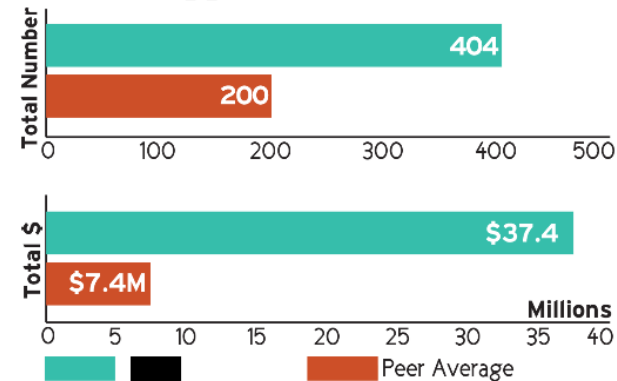
Designation of Gifts





28.5% of cash received designated for current operations

More than half of the amount raised went towards endowment

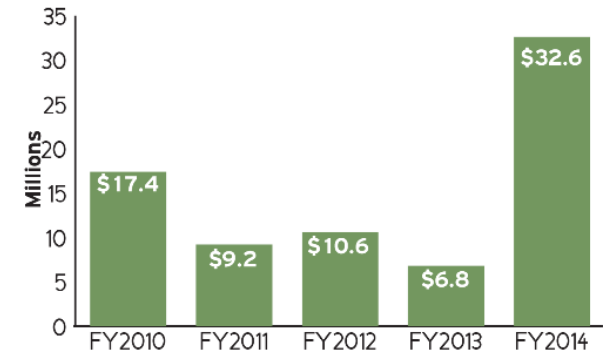
Appreciated Assets



 outperformed peers in both number and amount of appreciated assets

 was second among U.T. institutions in number of gifts and amount from appreciated assets

Gifts to Endowment



Exceptional growth in the amount given for endowments

 - Redacted

National Key Performance Indicators

\$44.3M

GIVING LEVEL:
 DETERMINED BY NEW CASH,
 NEW PLEDGES, AND DEFERRED
 GIFTS AT PRESENT VALUE.

	INSTITUTIONS WITH A GIVING LEVEL OF \$25-49M	INSTITUTIONS WITH A GIVING LEVEL OF \$50-74M
Total Development FTE	72	54
Frontline FTE	28	30
Total Development Budget	\$8.1M	\$3.9M

BASED ON EDUVENTURES' MANAGING RETURNS: PERFORMANCE INDICATORS BENCHMARKS

Development budget at 0.7% of E&G is under the national average of 1.4% and considerably below that of institutions raising \$25-49M (\$8.1M) and \$50-74M (\$11.8M)

Average for dollars raised per dollar invested of \$14.08 is very positive and exceeds national average of \$5.74 for peer institutions

Observations & Suggestions:

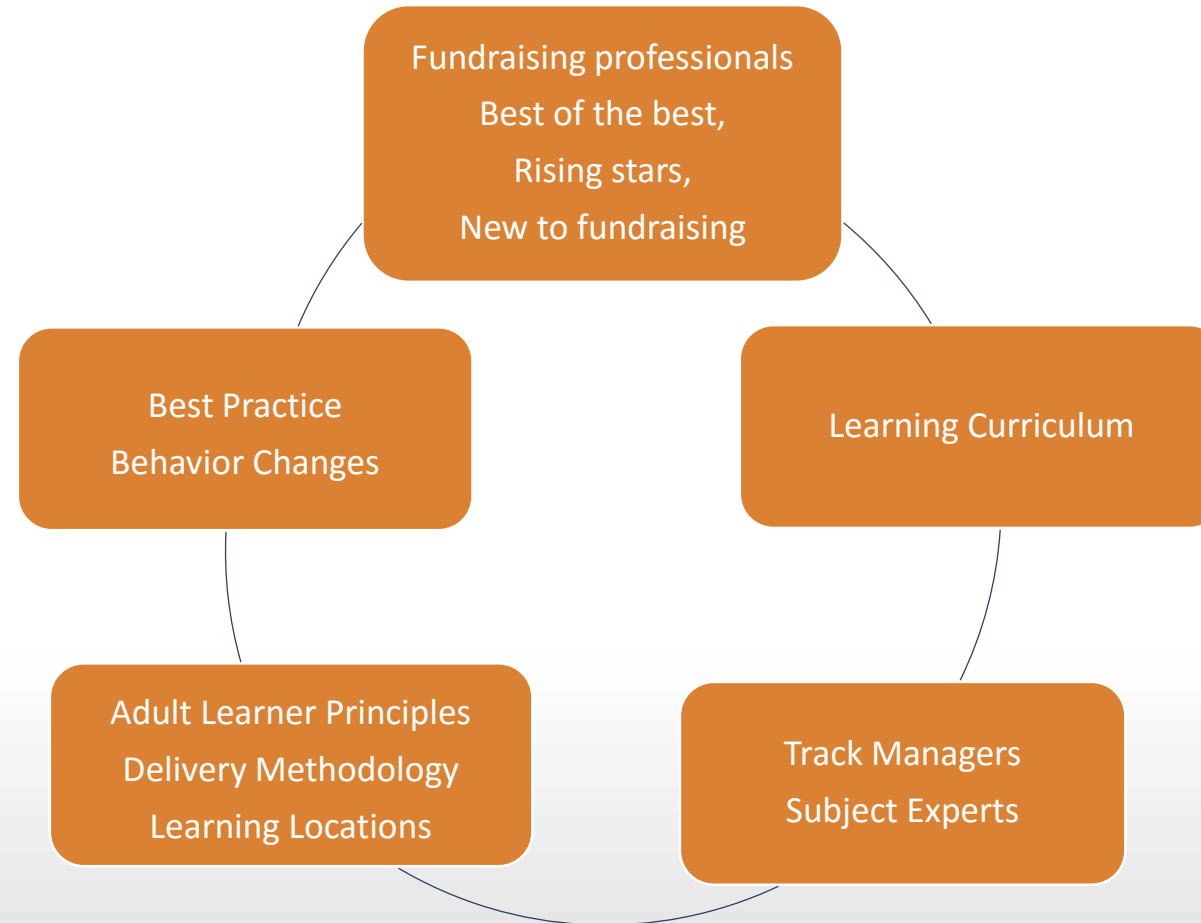
- Truly an exceptional year for [REDACTED] with record-breaking results
- Large gifts from individuals were the determining factor in the banner year
- Planned Giving program just beginning to show progress
- Declining donor count indicates annual giving program and strategy should be reviewed
- High ROI may indicate not all programs are being funded adequately. Depending on the review of the annual giving and alumni programs and strategies, more resources may be warranted for those programs
- [REDACTED] would benefit from a post-campaign review to measure outcomes and performance, and to prepare for sustainable fundraising following the campaign
- Special project initiatives will guide staff and donors in ongoing philanthropic priorities for [REDACTED]

[REDACTED] - Redacted

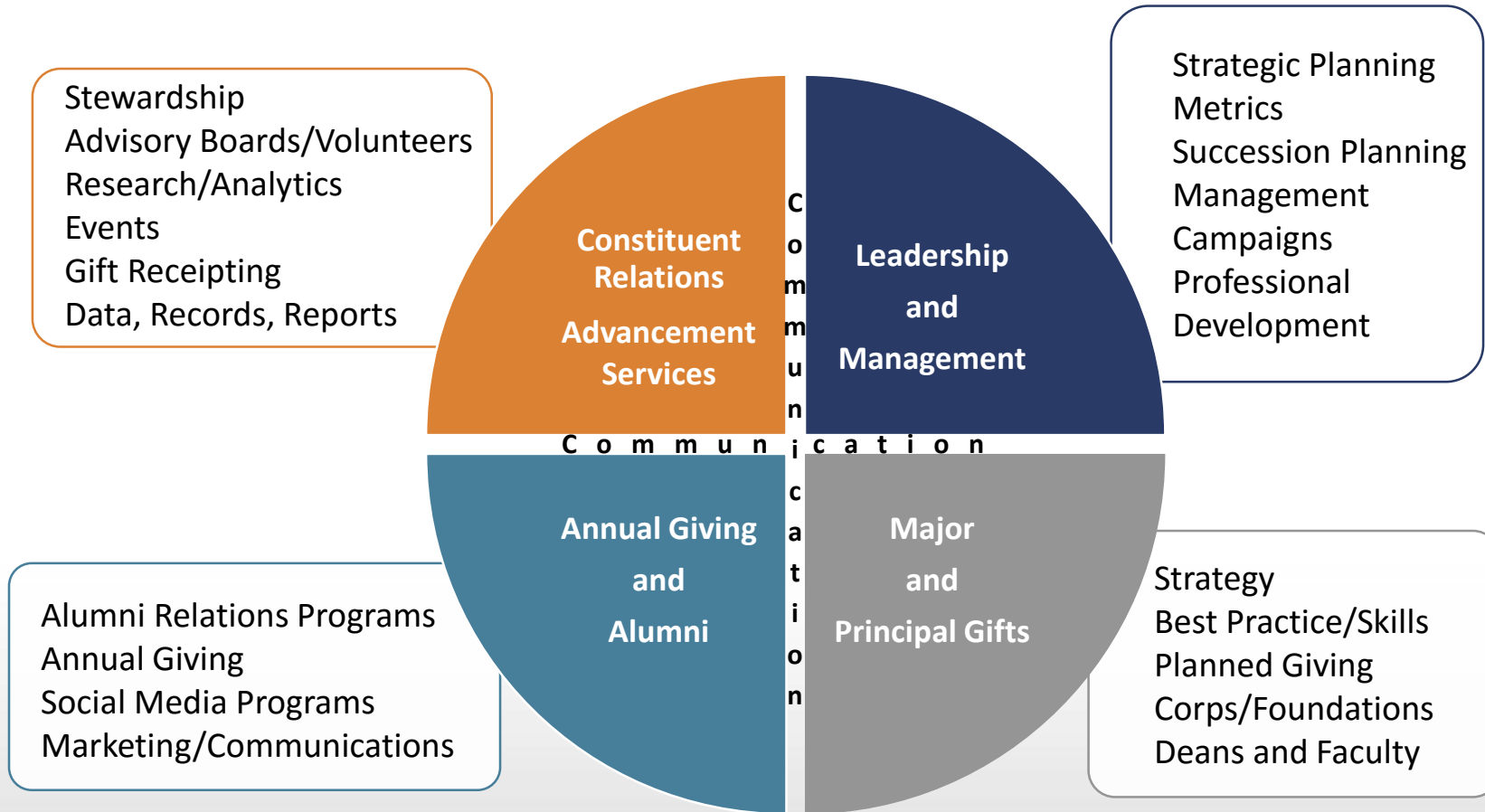
Advancement Academy

- Professional Development
- First in the nation
- Invitation only





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BY THE Numbers

The First Year of the UT System Advancement Academy



20

UT professionals were involved in the workshop & Boot Camp presentations

In 2015, we offered

38 POINTS

of continuing education towards CFRE certification (CFRE: Certified Fund Raising Executive)

93.6%

of Academy Workshops & Boot Camp rated

VERY GOOD
or
EXCELLENT
by attendees

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297 **UNIQUE PARTICIPANTS** :: Total Attendees:
394

\$227,700

saved in **registration fees** for professional development by
University of Texas institutions

(based on \$450.00 daily rate to attend professional association training)

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Talent Management

- Recruiting and Retaining high performers
- Onboarding strategies
- Career Paths
 - Strike Force of HR and Development leaders
- Internships
 - <http://www.utsystem.edu/offices/center-enhancing-philanthropy/internships>
- Careers in Philanthropy

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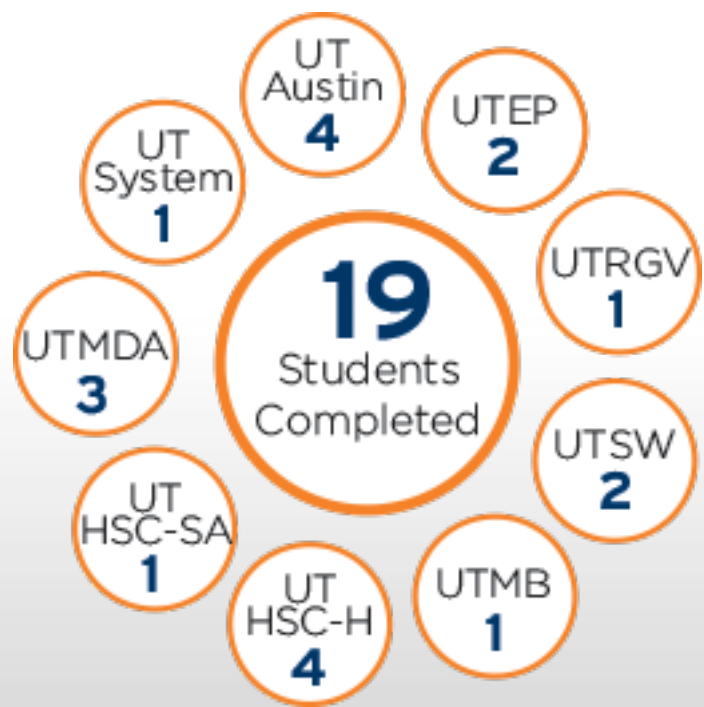


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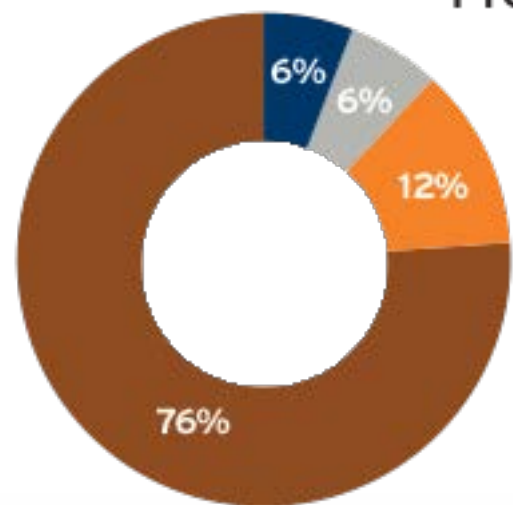
2016 Summer Internship Program

By the Numbers

236 Applicants  **20** Selected



Program Demographics



4 Males : **15** Females

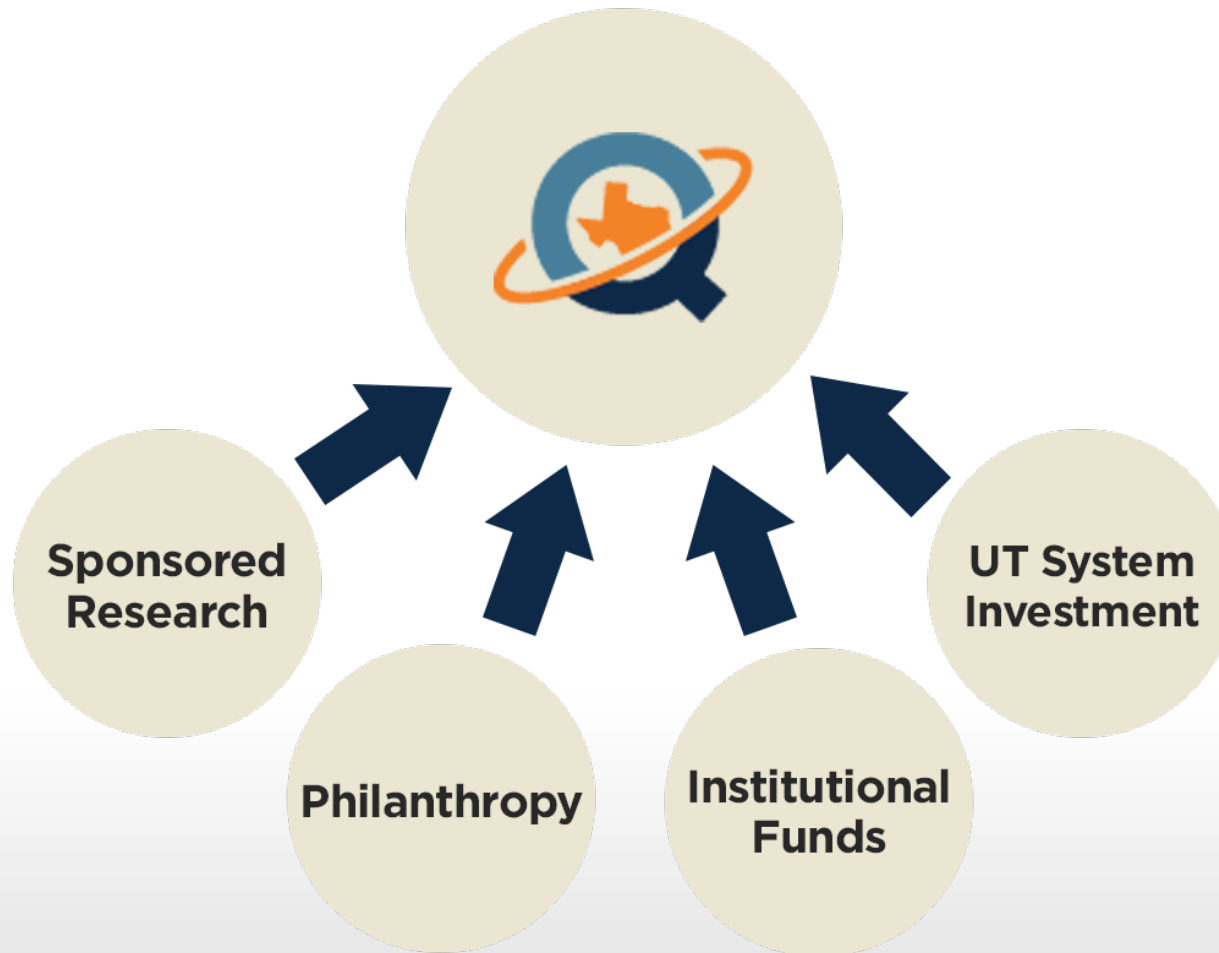
Interns' Career Paths:

- 5** Student workers in Development
- 3** Student workers in their degree field
- 11** Students seeking Development opportunities

Philanthropy and Strategic Priorities

- Where can we be collaborative
- Chancellor Priorities
- Quantum Leaps

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A perspective on a Career in Philanthropy

Whitney King – UT Tyler

Leslie Parks – UT Dallas

Scott Rabenold – UT Austin

Kevin Foyle, moderator – UTHealth



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