Mizzou Advancement
March 19, 2018
Mizzou Advancement

I. Who We Are
II. Strategic Planning Process
III. Metrics – Measuring Success
IV. Aligning Development with University Priorities
V. Areas That Require Support
I. Who We Are
Who We Are

I. Mission: Mizzou Advancement strives for national prominence in fundraising, alumni involvement and talent management to support Mizzou priorities.

II. Core values: Passion, teamwork, engagement

III. Dedicated resources across campus, including:

- Scholarships
- Intercollegiate athletics
- Corporations/Foundations
- Annual Fund
- Donor Relations
- Mizzou Alumni Association
- Schools and colleges
- Gift Planning & Regional Advancement
- Creative Services
- Advancement Services
II. Strategic Planning Process
Strategic Organizational Planning

- Leadership Re-organization
- Leadership Planning Sessions
- Right-sizing
  - Budget
  - Staffing
- Strategic Investments
- Continual SWOT analyses

<table>
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<tr>
<th>Internal Origin</th>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td></td>
<td>Solid fundraising performance</td>
<td>National reputation</td>
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<tr>
<td></td>
<td>Award-winning Advancement and Alumni program</td>
<td>Diversity</td>
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<td></td>
<td>Talent program</td>
<td>Recruitment and retention</td>
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<tr>
<td></td>
<td>Alumni network: 127 Chapters, 12,000 volunteers</td>
<td>Budget</td>
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<table>
<thead>
<tr>
<th>External Origin</th>
<th>Opportunities</th>
<th>Threats</th>
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<tbody>
<tr>
<td></td>
<td>Student body changing and new ways of engagement emerging</td>
<td>Rising cost of Advancement professionals</td>
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<tr>
<td></td>
<td>High number of untapped prospects, corporations, and foundations</td>
<td>Staff retention, 47% of fundraisers left their last job for higher compensation</td>
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<td></td>
<td>Big ideas/transformational giving</td>
<td>81% of non-profits list fundraising is their biggest challenge</td>
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<td>Technical advances in the industry</td>
<td>Higher education funding stability</td>
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Strategic Campaign Planning

- Executive Committee pre-planning meetings
- National case statement discussion tour (2012-2013)
- Feasibility study with Grenzebach Glier (recommended $1.2B goal)
- Consultation with campus leadership and Campaign Cabinet
- Campaign Cabinet approves $1.3B goal in September 2013
- Initial three priorities (campaign launch: October 2015)
  - Endowment
  - Signature Centers and Institutes
  - Campus Renaissance
- Framework has proven flexible
  - Added Student Success priority in August 2017
Strategic Annual Planning

• Annual planning process
  • Informed by donor/prospect data and division-wide SWOT analysis

• Each school/college/unit:
  • Evaluates donor pipeline for proposal opportunities
  • Meets with AVC and dean/director to set goals for dollars, proposals and substantive contacts
  • Updates AVC and dean/director on a monthly basis

• Regular communication and weekly tracking of team metrics drives accountability and success
Mizzou Development Planning Calendar

JULY
Biweekly principal gifts discussions
Celebrate Divisional Meeting
Individual Performance Appraisals

AUG
Mid Year Portfolio Check-In
Q1 Core Metric Review & Update

Q1 Special Initiative: Solicitation Focus

SEPT
Professional Development Track #1

Q2 Special Initiative: Stewardship Focus

OCT
Fundraiser Retreat

NOV
Q2 Core Metric Review & Update

DEC
Professional Development Track #2

JAN
Vice Chancellor Unit Mid Year Check-In

FEB
Annual Portfolio Review Process

Q3 Special Initiative: Cultivation Focus/Pipeline

MARCH
Q3 Core Metric Review & Update

APRIL
Unit Vision Setting Retreat

Q4 Special Initiative: Open Proposal Closes

MAY
Program & Priorities Review

JUNE
Annual Plan Completion

Q4 Core Metric Wrap-Up

JUNE
FY Kick Off – Divisional Meeting

OPEN – EXT AFF M&A – INFO 1-9

April 12-13, 2018
## Unit Annual Plans Roll Up

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<td><strong>345</strong></td>
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III. Metrics – Measuring Success
Division Metrics

• Campaign Goal: $1.3B
  • Set after feasibility study for *Mizzou Our Time To Lead Campaign*

• Annual Productivity: 2018 Goal of $175M
  • Includes all new gifts, pledges and estate commitments

• Voluntary Support of Education (VSE) - Cash
  • Includes all cash for the fiscal year including gifts, pledge payments and realized expectancies

• Annual Giving: $21M
Individual Metrics

- Dollars Raised
- Number of Proposals Closed
- Number of Proposals Presented
- Number of Personal Visits & Contacts
- Metrics for non-fundraising staff based on core duties (Research, Mizzou Alumni Association, Gift Processing, etc.)

*Metrics for individual fundraisers are customized based on position and tenure*
# Director - Large Unit - Tenured

## Fundraising Success

<table>
<thead>
<tr>
<th>Metric</th>
<th>Goal</th>
<th>Actual</th>
<th>% of Goal</th>
<th>Metric Weight</th>
<th>Category Weight</th>
<th>TOTAL</th>
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<tr>
<td>Division $ Goal</td>
<td>$175,000,000</td>
<td>$160,000,000</td>
<td>91%</td>
<td>10%</td>
<td>50%</td>
<td>48.21</td>
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<td>Unit $ Goal</td>
<td>$15,050,000</td>
<td>$13,000,000</td>
<td>86%</td>
<td>20%</td>
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<td>Personal $ Goal</td>
<td>$2,500,000</td>
<td>$2,500,000</td>
<td>100%</td>
<td>70%</td>
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## Proposal Activity

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<tr>
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<th>Goal</th>
<th>Actual</th>
<th>% of Goal</th>
<th>Metric Weight</th>
<th>Category Weight</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>MG Proposals Presented</td>
<td>16</td>
<td>16</td>
<td>100%</td>
<td>40%</td>
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<td>25.00</td>
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<tr>
<td>MG Proposals Closed</td>
<td>10</td>
<td>10</td>
<td>100%</td>
<td>60%</td>
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## Contact Activity

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<thead>
<tr>
<th>Metric</th>
<th>Goal</th>
<th>Actual</th>
<th>% of Goal</th>
<th>Metric Weight</th>
<th>Category Weight</th>
<th>TOTAL</th>
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<tbody>
<tr>
<td>Substantive Contacts</td>
<td>200</td>
<td>200</td>
<td>100%</td>
<td>10%</td>
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<td>25.00</td>
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<tr>
<td>Subs. Personal Visits</td>
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<td>125</td>
<td>100%</td>
<td>80%</td>
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<tr>
<td>Evaluation Visits</td>
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<td>100%</td>
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## Summary

Successful: 98.2%

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<thead>
<tr>
<th>Outstanding</th>
<th>115%+</th>
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<tr>
<td>Exceeds Expectations</td>
<td>105% - 114%</td>
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<tr>
<td>Successful</td>
<td>90% - 104%</td>
</tr>
<tr>
<td>Improvement Expected</td>
<td>80% - 89%</td>
</tr>
<tr>
<td>Unsuccessful</td>
<td>Less than 80%</td>
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*EXAMPLE - Director - Tenured*
Campaign Progress (in Millions)

FY12: $150
FY13: $299
FY14: $450
FY15: $604
FY16: $763
FY17: $906
FY18: $1,000

April 12-13, 2018
Annual Productivity (cash & pledges) (in Millions)

Productivity YTD

Productivity total

FY11  FY12  FY13  FY14  FY15  FY16  FY17  FY18YTD

$0  $20  $40  $60  $80  $100  $120  $140  $160  $180

April 12-13, 2018
$1M+ Gifts

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April 12-13, 2018
Process for Principal Gifts

- Big Gifts for Big Ideas
  - Cure Cancer
  - Feed the Poor
  - Eliminate Illiteracy
- Build Relationships
  - Match donor interest with MU priority
  - Develop vision, strategy and tactics
- Close
  - Ask for permission to submit proposal
  - Ask for planning money
  - Show appeal beyond Mizzou

**Campaign 8-Figure Gifts**
- $30M Reynolds Journalism Institute
- $30M East Side Football Stadium Expansion
- $25M Kinder Institute for Constitutional Democracy
- $21.6M Novak Leadership Institute
- $13.8M CAFNR
- $10M J-School Faculty Fellowships
- $10M School of Music Building
- $10M Football Facility

*Principal gifts fuel 37% of campaign productivity.*
Texas A&M: $290,458
Florida: $267,350
Vanderbilt: $193,581
South Carolina: $174,208
Georgia: $163,545
LSU: $121,572
Kentucky: $119,920
Mizzou: $119,526
Auburn: $104,418
Alabama: $98,956
Tennessee: $98,124
Ole Miss: $94,170
Mississippi St.: $89,521
Arkansas: $83,555

SEC 2017 Cash Total Raised
(in thousands)

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April 12-13, 2018
Cost to Raise a Dollar

For every $1.00 we invest, we return $7.70 (670% ROI).
Industry data shows average ROI of $5.53 for every dollar spent on development efforts among public institutions.
IV. Aligning Development with University Priorities
Aligning Campaign Goals with University Priorities

Advancement’s fundraising goals depend on building relationships and fostering engagement with alumni, friends, corporations and other key constituents.

University Priorities
- Student Success
- Research
- Creative Works
- Economic Development
- Innovation
- Engagement and Outreach

April 12-13, 2018
Support for Capital Projects

I. $167M raised toward $250M goal
II. The challenge of raising capital dollars
III. Private Support for Capital:
    I. TPMC (Feasibility study plan)
    II. School of Music Facility ($17M)
    III. School of Nursing Building ($6M)
    IV. Engineering Renovation ($2.5M)
    V. Journalism/Welcome Center ($5M)
    VI. Applied Learning Center ($10.8M)
    VII. South End Zone Facility ($48M)

Campus Renaissance
Progress Goal $250M
Gifts for Student Success

• Flagship Scholars program
• Smith Family Study Abroad Endowment
• William L. Hase and Alice M. Young Fellowship in Chemistry
Gifts to Fuel Research and Discovery

• Novak Leadership Institute
• Kinder Institute on Constitutional Democracy
• Thompson Center for Autism and Neurodevelopmental Disorders
Gifts to Foster Creativity

• New School of Music building ($17M raised)
• Miller Family Endowed Chair in Literature and Writing
• Center for Applied Theatre and Drama Research
Gifts to Drive Economic Development and Innovation

• Translational Precision Medicine Complex (planning)
• Enterprise Fund for Global Sustainability
• Walter B. Potter Fund for Innovation in Local Journalism
• Corporate partnerships
V. Areas That Require Support
Opportunities for Enhancement

- Sustainable strategic financial plan
- Enhanced investment in Talent Management Program — promoting career pathing, recruitment and retention
- Competitive salary structure
- Improve staffing funding models that promote and reflect partnerships with schools and colleges
Advancement Funding Structure

April 12-13, 2018
Cost of Attracting, Retaining and Losing Top Talent

*Data from Education Advisory Board.

Cost Summary:
- $127,650: Direct and indirect costs of finding a replacement fundraiser
- 117%: Cost of staff turnover as a percentage of salary
- $1M+: Estimated loss of gifts across six month vacancy and six month onboarding