Building on Momentum
Thomas J. Farrell ’88, ’90W (MS)
Conference Goals

- Gather volunteer leaders
- Share our plans
- Engage in dialogue
- Establish next steps
1. What motivates you to volunteer for the University?

2. What advice would you offer to the next generation of student leaders and volunteers? If you are a student, what advice would you give to alumni volunteers?
WHY ARE WE HERE?
Gene Transfer
Safe flu vaccine for little noses
Weird science: Human Aging
2015 Beckman-Argyros Award in Vision Research
Learn, Discover, Heal, Create—and Make the World Ever Better
Learn, Discover, Heal, Create—and Make the World Ever Better
Campus Community + Alumni and Friends

Create real impact across the world
Rochester’s Position

4,500 Colleges & Universities

- Selective Admissions
- Research/Doctoral
- AAU
- COFHE
- Premiere Private Research

35
62
100
200
Premiere Private American Research Universities

Brown University
California Institute of Technology
Carnegie Mellon University
Columbia University
Cornell University
Dartmouth College
Duke University
Emory University
Georgetown University
Harvard University
Johns Hopkins University
Massachusetts Institute of Technology
New York University

Northwestern University
Princeton University
Rice University
Stanford University
Tufts University
University of Chicago
University of Notre Dame

UNIVERSITY of ROCHESTER
University of Pennsylvania
University of Southern California
Vanderbilt University
Washington University in St. Louis
Yale University
Premiere Private American Research Universities

- Competitive Marketplace
- Resources (Human & Financial)
- Philanthropy & Engagement
<table>
<thead>
<tr>
<th>Rank</th>
<th>Organization</th>
<th>Student Population</th>
</tr>
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<td>Rice University</td>
<td>$571,755,000</td>
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Total Cash

Millions

- 2001: $63M
- 2002: $81M
- 2003: $101M
- 2004: $101M
- 2005: $101M
- 2006: $101M
- 2007: $101M
- 2008: $101M
- 2009: $101M
- 2010: $101M
- 2011: $101M
- 2012: $101M
- 2013: $101M
- 2014: $101M
- 2015: $101M

5 Year Average:
- 2001-2005: $63M
- 2006-2010: $81M
- 2011-2015: $101M
How far have we come?

Non-Financial
- GEC – 3,300
- Volunteers – 3,000
- Regional Cabinets
- National Councils
- Young Alumni

Financial
- Parents
- Meliora Weekend
- Regional Events
- Communications
FINISH STRONG
<table>
<thead>
<tr>
<th>Brown University</th>
<th>Harvard University</th>
<th>University of Miami</th>
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<tbody>
<tr>
<td>Boston College</td>
<td>Johns Hopkins University</td>
<td>University of Notre Dame</td>
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<td>Georgetown University</td>
<td>University of Chicago</td>
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</tbody>
</table>
BUILDING ON Momentum

The ROCHESTER MODEL

2021 Strategic Plan for University Advancement
2021 Strategic Plan Goals

- Build on current program (investment)
- Improve fundraising and engagement
- All areas + key drivers
- Sustainability – permanence – culture
- “Best in class”
Strategic Goals and Objectives

1. Increase **cash** giving to $135-175M per year by 2021.
2. Increase new gift **commitments** to $175-220M per year.
Projected Growth in Fundraising Commitments
FY16-FY21
$ in Millions
Projected Growth in Fundraising Cash Receipts  
FY16-FY21  
$ in Millions

Our aspirational goal is $175M in cash.
Strategic Goals and Objectives

1. Increase **cash** giving to **$135-175M** per year by 2021.
2. Increase new gift **commitments** to **$175-220M** per year.
3. Make **Alumni Relations** and **Constituent Engagement** programs a priority.
Strategic Vision

- Encouraging & Creating Philanthropy
- Building & Strengthening Community
- Building the Best Advancement Organization in Private Higher Education
Ways to Connect

- Alumni Relations
- Reunion/ class
- Affinity/ Shared interest groups/ Diversity
- Young/ recent graduates
- School and Unit
- Career development
- Admissions
- Fundraising/ philanthropy
Regional Strategy
Alumni Regional Programs Benchmarking

- Boston University
- Carnegie Mellon University
- Case Western Reserve
- Cornell University
- Dartmouth College
- Emory University
- Georgetown
- Johns Hopkins
- Lehigh University

- Northwestern
- Princeton
- Rice University
- Tufts University
- Tulane University
- Vanderbilt University
- Villanova University
- Washington University
New York City Demographics

- 500+ active volunteers
- 2,900+ alumni/parents/friends capable of a special gift to the University

<table>
<thead>
<tr>
<th>Alumni</th>
<th>13,600+</th>
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<tbody>
<tr>
<td>Arts &amp; Sciences</td>
<td>8,600+</td>
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<tr>
<td>Simon Business School</td>
<td>1,600+</td>
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<tr>
<td>Hajim School of Eng. and AS</td>
<td>1,100+</td>
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<tr>
<td>Eastman School of Music</td>
<td>1,000+</td>
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<tr>
<td>School of Med. and Dent.</td>
<td>1,000+</td>
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<tr>
<td>School of Nursing</td>
<td>300+</td>
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<tr>
<td>Warner School of Education</td>
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<tr>
<td>Eastman Inst. of Oral Health</td>
<td>100+</td>
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Plan Framework

1. Blue (large) and Gold (midsized) regional structure
# Blue and Gold Regional Structure

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<tr>
<th>Blue (large) Cities</th>
<th>Gold (mid-sized) Cities*</th>
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<tbody>
<tr>
<td>1. Rochester</td>
<td>• Albany, NY</td>
</tr>
<tr>
<td>2. Metro NYC</td>
<td>• Atlanta, GA</td>
</tr>
<tr>
<td>3. Boston</td>
<td>• Austin, TX</td>
</tr>
<tr>
<td>4. Philadelphia</td>
<td>• Baltimore, MD</td>
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<tr>
<td>5. Washington, DC</td>
<td>• Buffalo, NY</td>
</tr>
<tr>
<td>6. Chicago</td>
<td>• Cleveland, OH</td>
</tr>
<tr>
<td>7. San Francisco</td>
<td>• Dallas, TX</td>
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<tr>
<td>8. Los Angeles</td>
<td>• Denver, CO</td>
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<tr>
<td></td>
<td>• Durham/Raleigh, NC</td>
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<tr>
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<td>• Houston, TX</td>
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<tr>
<td></td>
<td>• Phoenix, AZ</td>
</tr>
<tr>
<td></td>
<td>• San Diego, CA</td>
</tr>
<tr>
<td></td>
<td>• Seattle, WA</td>
</tr>
<tr>
<td></td>
<td>• Syracuse, NY</td>
</tr>
</tbody>
</table>

*Gold Regions are still being defined this is a preliminary/draft list.
Plan Framework

1. **Blue** (large) and **Gold** (midsized) regional structure
2. **University and School/Unit** matrix strategy
3. Programming/events are core deliverables
<table>
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<tr>
<th></th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
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<tr>
<td>Small Events</td>
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<tr>
<td>Midsized Events</td>
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<tr>
<td>Large / All Constituency Event</td>
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<tr>
<td>Organic</td>
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<tr>
<td>School / Unit / University</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>
Plan Framework

1. **Blue** (large) and **Gold** (midsized) regional structure
2. **University and School/Unit** matrix strategy
3. Programming/events are core deliverables
4. “Leverage” partnerships and expand volunteer leadership network
Plan Framework

1. **Blue** (large) and **Gold** (midsized) regional structure
2. **University and School/Unit** matrix strategy
3. Programming/events are core deliverables
4. “Leverage” partnerships and expand volunteer leadership network
5. **Robust communication** plan
   - (Internal and External)
6. **Goals-based** (measurement)
DONATE

PARTICIPATE

VOLUNTEER

19%

All Alumni Engagement Score
25%

2.5%
NYC Engagement Projection Model

To move REI to 40%, New York will need approximately 2,000 newly engaged alumni over 5 years (approx. 400 newly engaged alumni each year)

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<tr>
<th>Alumni</th>
<th>23.5%</th>
<th>28%</th>
<th>31%</th>
<th>34%</th>
<th>37%</th>
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<td>3,451</td>
<td>3,850</td>
<td>4,249</td>
<td>4,649</td>
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FY16: 3,451  23.5%
FY17: 3,850  28%
FY18: 4,249  31%
FY19: 4,649  34%
FY20: 5,048  37%
FY21: 5,448  40%
Plan Framework

1. **Blue** (large) and **Gold** (midsized) regional structure
2. University *and* School/Unit matrix strategy
3. Programming/events are core deliverables
4. “Leverage” partnerships and expand volunteer leadership network
5. **Robust communication plan**
   - (Internal and External)
6. **Goals-based** (measurement)
7. Robust **staff** support/management
Timeline

FY16
- Communicate plan
- Identify and recruit volunteers
- Hold volunteer leadership conference
- Focus on Blue and existing regions

FY17
- Launch new plan
- Focus on the Blue and existing regions
- Prepare for Gold regions

FY18
- Launch Gold regions
Strategic Goals and Objectives

1. Increase cash giving to $135-175M per year by 2021.
2. Increase new gift commitments to $175-220M per year.
3. Make Alumni Relations and Constituent Engagement programs a priority.
4. Increase the undergraduate annual giving participation rate to a minimum of 25% and a stretch goal of 30%. Improve all School and Unit participation rates.
US News & World Report
Alumni Giving Participation Rankings
(2014, ordered by overall US News ranking)
Strategic Goals and Objectives

1. Increase cash giving to $135-175M per year by 2021.
2. Increase new gift commitments to $175-220M per year.
3. Make Alumni Relations and Constituent Engagement programs a priority.
4. Increase the undergraduate annual giving participation rate to a minimum of 25% and a stretch goal of 30%. Improve all School and Unit participation rates.
5. Align giving priorities and engagement opportunities with the University’s strategic plan.
6. Review and further develop meaningful volunteer leadership programs.
7. Improve productivity.
8 Keys To Success

Principal Gifts

3 Drivers
Strategy URMC, ASE, Schools/Units

Major Gifts

Alumni & Constituent Engagement

Partnership & Culture Building

Volunteer Involvement & Stewardship

Case for Support/Priorities

Management (Accountability, Productivity) Services
8 Keys To Success

- Principal Gifts
- Major Gifts
- 3 Drivers Strategy URMC, ASE, Schools/Units
- Management (Accountability, Productivity) Services
- Case for Support/Priorities
- Volunteer Involvement & Stewardship
- Partnership & Culture Building
- Alumni & Constituent Engagement
8 Keys To Success

- Principal Gifts
- Major Gifts
- Alumni & Constituent Engagement
- Partnership & Culture Building
- Volunteer Involvement & Stewardship
- Case for Support/Priorities
- Management (Accountability, Productivity) Services
- 3 Drivers Strategy URMC, ASE, Schools/Units
8 Keys To Success

- Principal Gifts
- Major Gifts
- Alumni & Constituent Engagement
- Partnership & Culture Building
- Volunteer Involvement & Stewardship
- Case for Support/Priorities
- 3 Drivers Strategy URMC, ASE, Schools/Units
- Management (Accountability, Productivity) Services
COME AND GET YOUR MELIORA ON

WE’RE HAVING A PARTY. A BIG ONE.

SAVE THE DATE
for a celebration that’s better than ever.

October 6–9, 2016
MELIORA WEEKEND 2016
ATTENDANCE COMMITTEE