University of Florida Foundation

Strategic Plan

Florida Next

Adopted by UFF Board
February 25, 2012
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Foreword

Private revenues have continued to grow since the inception of the University of Florida Foundation in 1934. In the last 25 years, through three capital campaigns, the growth has been remarkable. Currently we raise $180 million annually as determined by the Voluntary Support of Education (VSE) Report. In 2010 – 2011, we raised $201 million.

State support for UF has declined incrementally over the last 10 years and is likely to continue declining. We are committed to the University’s efforts to sustain and increase state support, while acknowledging that private support will become increasingly necessary to maintain excellence.

The three year plan attached is designed to grow annual gift revenues to a sustainable $225 million per year with a stretch goal of $250 million per year. To accomplish this goal we will focus on seven strategic initiatives: strengthen philanthropy, invest in talent management, enhance donor relations, align, strengthen, and create partnerships, further engage volunteer leadership, develop multi-year funding model and ensure best governance practices.
The future is bright with many great opportunities. We strive “to be the best” by living our values of Respect, Accountability, Integrity, Stewardship and Excellence (RAISE). Reaching these lofty goals will require a concerted effort among the University, the Foundation, our alumni, donors and friends.

We are all up to the challenge.

Keith Koenig  
Chair, UF Foundation  
Board of Directors

Kelley Bergstrom  
Vice-chair, UF Foundation  
Board of Directors;  
Chair, Strategic Planning Committee

Tom Mitchell  
Vice President,  
Development and Alumni Affairs  
Executive Vice President,  
UF Foundation
University of Florida Foundation

**Vision:**
To be a vital partner with the University by connecting donor resources in the pursuit of excellence.

**Mission:**
To promote the University, increase philanthropy, manage and grow the endowment, ensure the appropriate use of funds and pursue best governance practices.
Cohort

University of California, Los Angeles

University of Michigan

University of North Carolina, Chapel Hill

Ohio State

Penn State

Texas A&M

University of Texas, Austin

University of Washington
<table>
<thead>
<tr>
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<th>University</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>University of California, Los Angeles (CA)</td>
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</tr>
<tr>
<td>2</td>
<td>University of Texas at Austin (Austin, TX)</td>
<td>$354M</td>
</tr>
<tr>
<td>3</td>
<td>University of Washington (Seattle, WA)</td>
<td>$334M</td>
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<tr>
<td>4</td>
<td>University of Wisconsin-Madison (Madison, WI)</td>
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<tr>
<td>5</td>
<td>Indiana University (Bloomington, IN)</td>
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## Public University Endowments 2011
(National Association of College and University Business Officers Report – NACUBO)

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<thead>
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<th>Rank</th>
<th>University Name and Notes</th>
<th>Endowment Value</th>
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<td>University of California System*</td>
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<td>University of Pittsburgh</td>
<td>$2.5B</td>
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<td>7</td>
<td>University of North Carolina at Chapel Hill &amp; Foundations</td>
<td>$2.3B</td>
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<tr>
<td>8</td>
<td>Ohio State University</td>
<td>$2.1B</td>
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<td>9</td>
<td>Purdue University</td>
<td>$2.0B</td>
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<td>Indiana University and Foundation</td>
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<td>12</td>
<td>UCLA Foundation</td>
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<td>13</td>
<td>Michigan State</td>
<td>$1.4B</td>
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<td>14</td>
<td>University of Florida</td>
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<tr>
<td>14</td>
<td>University of Wisconsin</td>
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</tbody>
</table>

*These schools report as systems rather than individual schools.
Strategic Initiatives

Initiative 1: Strengthen Philanthropy

Current Situation:

UFF’s fundraising program is a central/decentralized hybrid model program with central services and primary major gift fundraising done by the colleges/units. The comprehensive program includes Annual Giving, Corporate Development, Foundation Development, International Advancement, Planned Giving, Principal Gifts and central coordination of fundraising prospects and services. We currently have 74 development officers. In FY 2011, we raised $201 million (VSE). We are in the last year of a $1.5 billion capital campaign; as of December 31, 2011 we have raised $1.49 billion. The operating budget for fundraising for FY 2011 was $21.4 million.

Aspirations:

Our overall goal for the next 3 years is to raise annual gift levels to a sustainable $225 million per year with a stretch goal of $250 million per year. This will require a fundraising team of approximately 90 development officers, which will require us to hire approximately four additional development officers per year.

We will need to develop plans to support a fundraising program that reflects the University’s priorities, including global activities and with significant focus on “Big Ideas” and interdisciplinary research clusters that will provide exciting opportunities for principal gift donors ($5 million+).

Goal/Metrics:

1. Goal: Build on the success of the Florida Tomorrow Campaign and grow the annual fundraising base, to be consistently ranked among the top of our public cohort group and among the Top Ten public universities.

Metric: Increase annual fundraising support to $225 - $250 million per year by the year 2015.

Metric: Move up in VSE rankings (Top Ten).

2. Goal: Redefine and focus the Regional Fundraising Program.
Metric: Review current regionalization model and establish a new model with two test sites by 2012; consider south Florida and southern California as our first test markets. Also test regional “blitzes” identifying 2 regions a year for multiple days of UF activities, possibly including student recruitment, alumni activities, government relations, etc.


Metric: Focus plan on developing larger physical presence in south Florida (Miami) by July 2012.

3. Goal: Further strengthen the Principal Gifts Program.


Metric: Close ten + $5 million gifts per year.

Metric: Attract gifts in the $50 - $100 million range; close one $50 million + gift by 2015.

4. Goal: Design, develop and launch Special Initiatives/ “Big Ideas” that are cross functional and interdisciplinary, with a special focus on exploring opportunities with the Division of Sponsored Research and the Office of Technology Licensing.

Metric: Work with the Provost to further strengthen and launch our “Big Ideas” strategy by June 30, 2012.

5. Goal: Further develop the current top college/unit fundraising programs: Business, Medicine, Athletics, IFAS, CLAS and Engineering; establish stretch goals and implement high performance metrics to ensure that these programs lead the way for increased annual fundraising.

Metric: Increase annual gifts in these units by ten percent plus annually.

6. Goal: Develop goals and metrics for all other college/unit fundraising programs. These programs may grow at a slower rate than others due to limited prospects and wealth potential.

Metric: Increase annual gifts in these units by five to ten percent (individualized/situational).

7. Goal: Revamp and focus the Planned Giving program.
Metric: Hire new Director of Planned giving by June 2012 and grow planned gifts by ten plus percent per year over current productivity level.

NOTE: Total Commitments = new cash gifts + new gifts in kind + new pledges at face value + new deferred gifts at present value.

**Initiative 2: Invest in Talent Management**

**Current Situation:**

The Human Resources Division (HR) manages dual payroll, benefit and retirement programs. This division serves approximately 285 employees (200 UF and 85 UFF) and has 4.5 FTEs with an annual operating budget of $536,632. Due to staff and budget constraints, the division is unable to staff a full range of Talent Management programs, including proactive recruiting and retention, on-boarding and mentoring. Succession planning is another component of Talent Management that will require focused attention in the next three to five years.

**Aspirations:**

Our vision is to design, develop, implement and manage a comprehensive Talent Management Program, which will include focus on the retention of our best and brightest staff, the development of our entire team and the recruitment of top talent. Our aspiration is to compete on the national level for the best talent available.
Goal/Metrics:

1. Goal: Hire leader in Talent Management who will oversee the Talent Management program, retention, recruiting, employee development and on-boarding; will report directly to the Vice President for Development and Alumni Affairs.

   Metric: Hire Associate Vice President for Talent Management by June 2012.

2. Goal: Implement new cultural plan: To Be the Best - The Gold Standard. Each major unit has completed an analysis of the attributes of the Top Performing program in its area. Unit leaders will assess their progress, goals and budgets in order to increase their rankings – to become the best! This plan needs to be fully embraced throughout our work environment and will apply at all levels.

   Metric: Track progress unit by unit in Top Attributes charts. Move each major Functional Area two spots each year.

   Metric: Finalize and implement cultural roll out plan by April 2012.

3. Goal: New Associate Vice President to do comprehensive analysis of current talent and talent needed to successfully implement this strategic plan.

   Metric: Complete by December 2012.

4. Goal: Maintain comprehensive professional staff retention program, with goal of retaining 90% of the identified retention pool by 2015.

   Metric: Identify and define Top Performers at all levels in the organization by April 2012.

   Metric: Have career maps in place for all Top Performers, which will include personal strategies for growth and retention, by June 2012.

5. Goal: Design and implement proactive and strategic recruitment system.

   Metric: Associate Vice President for Talent Management to create a proactive recruiting strategy/environment, including input from staff attending conferences, etc., by December 2012.

   Metric: Develop a profile for a successful development officer at UFF by April 2012. Incorporate profile into all recruiting activities.
Metric: With Development Communications and HR: (a) upgrade all development position descriptions to incorporate cultural plan, values and profile by August 2012, (b) develop an organizational package (a recruiting brochure) to outline who we are, how we work, what are our values, how we will ensure each person’s success, by July 2012, and (c) upgrade website.

6. Goal: Support comprehensive educational, management and leadership training programs.

Metric: Design our own “development university,” a comprehensive continuous training program for development staff; link with new staff on-boarding, to be staffed internally and by external experts, by December 2013.

Metric: Develop continuing in-house educational training and leadership programs for all staff. Underway.

7. Goal: Create and maintain a diverse workforce.

Metric: Review our current demographics and design a plan to improve diversity by 2015.

**Initiative 3: Enhance Donor Relations**

**Current Situation:**

The Office of Donor Relations manages a central/decentralized program which provides comprehensive stewardship activities to donors from UF and UFF. The program includes annual endowment reports, recognition societies, stewardship recognition websites, individualized stewardship plans, gift and congratulatory acknowledgments from the UF President, impact reports, and other stewardship projects as needed. The office has eight FTEs including the director. The operating budget for FY 2012 is $400K.

**Aspirations:**

The primary goal for the next three years is to provide value added service to our fundraising team, especially the colleges and units. This will require a move to a decentralized/centralized model, with collaborative donor relations strategies being jointly developed and put into place by the colleges and units.

The goal will be to maintain a focused central Donor Relations program while creating highly personalized, individualized college/unit based stewardship. The central Donor Relations team will continue to maintain some of the core central functions.

The central office will migrate to a consultant role, providing leadership and resources to ensure quality and consistency while assisting the colleges and units to develop their own programs. Central Donor Relations will assign Donor Relations staff to specific colleges and units to serve as part of their teams.
Principal Gifts will partner and consult with Donor Relations and the colleges and units to create meaningful individualized stewardship annual plans for principal gift donors.

In order to achieve the goals of the decentralized/centralized model, we will need to create an accountability system reflected in a Memorandum of Understanding between UFF and each college/unit to ensure consistency and quality.

**Goal/Metrics:**

1. **Goal:** Maintain a central Donor Relations program (selected activities) and begin to develop decentralized college/unit based programs, with specific central staff assigned to colleges and units to provide resources and consultation in the development of the college/unit programs.

   **Metric:** Form joint college/unit Development Officer and Central Donor Relations team and draft business plan by June 2012.

2. **Goal:** Develop a standardized template that incorporates Donor Relations “best practices” for use by colleges and units.

   **Metric:** Complete by April 2012.

3. **Goal:** Through the Principal Gifts office, provide comprehensive and unique individualized stewardship plans (ISPs) for principal gift donors and prospects in coordination with the colleges and units.

   **Metric:** Complete ISPs for all Principal Gift donors by June 2012.

4. **Goal:** Continue to maintain the central endowment reporting.
Metric: Design, develop and implement a structure for electronic reporting in fiscal year 2013.

Metric: Measure value and number of gifts and pledges that are received in the three months following the annual endowment report issuance.

5. Goal: Continue to support UFF Board member personal thank you note program to donors who have given $100K or more.

Metric: Partner with the UFF Board Coordinator and provide accurate donor information to Board members monthly. Confirm letters are written and sent.

**Initiative 4: Align, Strengthen and Create Partnerships**

**Current Situation:**

UFF has strong relationships with many areas on campus, including the deans and directors, Student Financial Aid, and others. There may be opportunities to further strengthen these partnerships and create new relationships within the university community and external constituents.

**Aspirations:**

One of the guiding principles of our vision is to form unique partnerships that reduce costs, leverage talent and increase performance. We hope to identify and facilitate activities that employ university and non-university experts, all working towards a common goal. Possible internal partners might include Admissions, Public and Community Relations, the Career Resource Center, and others. Possible external partners might include the Sebastian Ferrero Foundation, for example.

**Goal/Metrics:**

1. Goal: Strengthen partnerships with colleges/units to ensure fully integrated planning, management, budgeting, goal setting, and performance metrics.

   Metric: Hold UFF and individual college/unit planning and coordinating sessions twice a year beginning in October 2012 for FY 2013-2014. Anticipate a pilot program in spring 2012.

   Metric: Document Memorandums of Understanding (MOU), with each college/unit annually regarding the division of labor and the use of central services, beginning in FY 2013.
2. **Goal:** Coordinate and integrate messaging among UF, UFF, UFAA and colleges/units, with strong focus on moving to technological and social media means of communicating and away from print.

   **Metric:** FY 2013 develop plan for moving away from print; after plan is developed, set goals and metrics.

3. **Goal:** Cooperatively with UFAA, increase the percentage of alumni giving.

   **Metric:** Increase alumni participation to 18% by 2015 (alumni = undergraduate degree alumni).

4. **Goal:** Cooperatively with Student Affairs, increase support for Florida Opportunity Scholarships.

   **Metric:** FY 2011, total non-endowed gifts were $1,555,196 and endowed gifts were $3,328,391; increase annual fundraising by ten percent plus.

5. **Goal:** Work with University leadership to identify University priorities and new fundraising initiatives post Florida Tomorrow.

   **Metric:** Work closely with the President and Senior Vice Presidents to develop fundraising priority plan post Florida Tomorrow.
Initiative 5: Further Engage Volunteer Leadership

Current Situation:

UFF is staff driven and volunteer assisted. UFF has a Board of Directors of 45 elected members and over 100 total members (including ex-officio and life members).

UFAA, Shands, Shands Jacksonville, Gator Boosters, etc., also have boards of directors that meet regularly. Many UF colleges and units, departments and programs have volunteer boards or advisory councils.

Currently we have 697 volunteers across campus that we track in our Gator Volunteer Network. A particular success has been the regional volunteer committee structure which involves approximately 250 volunteers. Volunteers are primarily involved in prospect identification and in an advisory capacity.

Aspirations:

The plan is to strengthen strategic volunteer engagement in a way that maximizes the use of each volunteer’s strengths, resources and time, and advances the University’s mission and vision. Success would be providing individualized, strategic engagement that employs a volunteer as a full partner in the fundraising process: identifying prospects, strategic cultivation activities, solicitation of gifts, and stewardship of donors.

We would maximize the value of volunteer leadership in many different venues and to further strengthen effective use of volunteers. This would include updating position descriptions for various volunteer roles, with special emphasis on identifying new major gift prospects, strategic assistance with cultivation strategies and stewardship.

Goal/Metrics:

1. Goal: Design programs to assist the colleges and units to ensure that volunteers are assisting in advancement activities, including prospect identification, solicitation of gifts and stewardship activities.

   Metric: Develop a template for a “best practices” detailed position description for a volunteer board/committee/council member that can be used by each college/unit for each board, committee or advisory council. Complete by June 2012. The position description should include specific activities, e.g., introduce development officer to three new prospects each year.
Metric: Develop a “best practices” template for operating guidelines for a committee or advisory council. Complete by June 2012.

2. Goal: Further develop position description with a menu of options for Board members that includes a list of annual and ad hoc opportunities.

Metric: Complete by June 2012.

3. Goal: Develop complete “onboarding/integration program” for new UFF Board members.

Metric: Board Coordinator to develop by October 2012.

4. Goal: Organize coordinated annual meetings between UFF and UFAA executive committee leadership to foster better understanding of each other’s missions, programs and activities. Share strategic plans.

Metric: To be completed in FY 2012.

5. Goal: Design UF/UFF “advocacy points” that can be used by UFF Board members to advocate for UF/Colleges/Units.

Metric: To be completed by June 2012.
Initiative 6: Develop Multi-year Funding Model

Current Situation:

UFF is a $1.7 billion corporation with a $35.6 million operating budget. The organization has the primary responsibility of private gift revenue management for UF. As of June 30, 2011, the UF endowment was $1.3 billion which is managed by UFICO, UF’s investment management corporation, under the oversight of the UFF Board of Directors Finance Committee. UFF is essentially a full service bank. We manage charitable trusts and charitable gift annuities, life insurance policies, mortgages and other notes, real estate for use and liquidation, savings and checking accounts (the endowment funds), pension plan, etc. UFF serves in a fiduciary capacity for the charitable trusts and annuities, and, currently outsource management of these planned gifts to BNY Mellon. We maintain and support over 8,000 individual funds (almost all with their own donor restrictions). UFF is currently self-funded primarily through a series of administrative fees, which are in the moderate range of comparable institutions. Our current return on investment (ROI) is $11/$1.

UFF has strong internal controls over our financial affairs, as confirmed by our annual external and internal audits. We have comprehensive written policies and procedures, all of which are available on our on-line business center. The majority of our documents are imaged and available to our staff and other fundraisers via web access.

We have a comprehensive annual risk management procedure which includes insurance coverages, inventory controls, IT controls of various sorts, reviews of gift vehicles, etc.

Aspirations:

We continue to aspire to the Gold Standard of institutionally related foundations; to reallocate our resources to be consistent with the priorities of this strategic plan; to creatively explore innovative and entrepreneurial ideas and revenues sources; to continue to review and refresh our funding model to ensure adequate funds to support the goals in this strategic plan.

Goal/Metrics:

1. Goal: Review our current funding model to identify risks, opportunities and identify ways to reduce costs.

   Metric: Complete review by June 2012; develop suggestions for revisions to the model and possible new revenue streams.

2. Goal: Grow endowment to $1.5 billion by 2015.

   Metric: Continue to review endowment spending policy and endowment management, annually, with UFF Finance Committee.

   Metric: Increase annual cash gifts to grow endowment. FY 2011 was $44.5 million.
3. Goal: Steadily increase the annual spendable dollars made available to the University. 
Spendable Dollars = new non-endowed liquid gifts + annual endowment spendable transfers (excluding gifts in kind, non-endowed real estate gifts and pledges). In FY 2011, the Foundation made available $86.3 million to the University.

Metric: Grow spendable dollars to exceed $100 million annually.

4. Goal: Increase percentage of pledge payment fulfillment. FY 2011, 66.3%

Metric: Incorporate into development officer goals and create proactive plan to monitor.


Metric: Track ROI, understanding that ROI may fluctuate during investment period.

*Total Commitments = new cash gifts + new gifts in kind + new pledges at face value + new deferred gifts at present value.

Initiative 7: Ensure Best Governance Practices

Current Situation:

UFF is an institutionally related foundation, and direct support organization of the University of Florida. We have extensive written policies and procedures in place to ensure annual comprehensive risk management assessments. Additionally, we complete the CASE Management Checklist annually and report on this with the Board’s Executive Committee. We produce quarterly accessible financial statements for our Board, have a procedure for reviewing and approving UFF’s annual tax return, have a documented annual UBIT procedure, file all necessary annual charitable solicitation statute forms, etc. In addition, supervised by the Board’s Audit Committee, we engage a national external auditor and also the services of the University Office of Audit Review and Compliance to have three to five annual internal audits. The most important is the annual Restricted Gifts Audit which confirms that colleges and units are managing and using their gift funds consistent with donor restrictions.

The UFF Board has 45 elected members and over 100 total members (including ex-officio and life members). The UFF Board of Directors is responsible for the setting of policies and procedures governing fundraising and fund management. The UFF Board has a number of committees and advisory councils. They each have individual responsibilities to assist in our core missions: fundraising, fund management, stewardship, etc. The Executive Committee is comprised of the Board’s officers, chairs of standing committees and a presidential appointee. The Executive Committee is empowered to act on the Board’s behalf between regularly scheduled meetings.
Aspirations:

We must maintain excellent business and governance practices to be considered among our cohort as a first rate institutionally related foundation.

Post “Florida Tomorrow” campaign and concurrent with the adoption of this strategic plan, we will review the board structure to ensure committee and council work is focused on the initiatives in this plan.

Goals/Metrics:

1. **Goal:** Create a new ad hoc Board advisory council to review the entire governance structure of the UFF Board to ensure that the committee and council structure reflects the priorities of this strategic plan.

   **Metric:** The ad hoc committee should be empowered and given its charge by the UFF Executive Committee by September 2012.

2. **Goal:** Review Board Nominating Advisory Council procedures to ensure continuing commitment to diversity on multiple levels.

   **Metric:** Complete board matrix annually and use it as an important component of the nominating process to further strengthen our commitment to diversity.

3. **Goal:** Review and refresh the UFF Board member position description, the Gold Standard of Giving, the committee/advisory council mission and vision statement and related volunteer position descriptions.

   **Metric:** Complete by September 2012.
4. **Goal:** Establish procedures to ensure succession in UFF Board Committee and Advisory Council leadership structures.

   **Metric:** Review and compare data with peers. Complete by May 2012.
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<th>STRATEGIC INITIATIVES</th>
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<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
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<td>1. Strengthen Philanthropy</td>
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<tr>
<td>• VSE ($250M by FY 2015)</td>
<td>$201M</td>
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<tr>
<td>• “Total Commitments”(^1)</td>
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<td>• Number &amp; Percentage of Principal Gifts of Total Commitments(^1)</td>
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<td>• Top Fundraising Programs(^2) (% of Total Commitments)</td>
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<td>• Planned Gifts (% of Total Commitments)</td>
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<td>2. Invest in Talent Management</td>
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<td>• Number of Targeted Sustainable Talent Programs created (2 annually)</td>
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<td>• Number of New Targeted Development Officer Positions - Hired</td>
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<td>3. Enhance Donor Relations</td>
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<tr>
<td>• Number of MOU’s with colleges/units</td>
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<td>• Number of Individualized Stewardship Plans for principal gift prospects or donors</td>
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<td>• Number of Annual Endowment Impact Reports</td>
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<td>• Number of gifts &amp; pledges received during 3 months post Annual Endowment Reports (AER) from AER recipients</td>
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<tr>
<td>• Number of UFF Board Thank You notes</td>
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<td></td>
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<td>4. Align, Strengthen Alliances &amp; Partnerships</td>
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<tr>
<td>• Number of UFF college/ unit annual planning meetings &amp; agreements</td>
<td>0</td>
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<tr>
<td>• Percentage of Alumni Giving</td>
<td>15%</td>
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</tbody>
</table>
Total Commitments = new cash gifts, new gifts in kind, new pledges (at face value) and new deferred gifts (at present value).

5. Further Engage Volunteer Leadership

- Number of new prospects identified by UFF Board members: 26
- Number of prospect/donor visits with UFF Board Members: N/A
- Number of Thank You notes written by UFF Board members: 151

6. Develop Multi-year Funding Model

- Percentage of Pledge Payment Fulfillment: 66.3%
- NACUBO Endowment: $1.3B
- Endowment Investment Return as of 6/30/11: 17.3%
- ROI\(^2\): $11
- Dollar amount of new gifts-endowment: $44.5M
- Spendable dollars made available to University\(^4\): $86.3M

7. Ensure Best Governance Practices

- Board member attendance at board meetings of 45 elected members – two times yearly: 66%
- Number of New Board Members fitting Annual Profile\(^5\): N/A
- Number of UFF elected 45 who met Gold Standard: 15

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\(^1\)Total Commitments = new cash gifts, new gifts in kind, new pledges (at face value) and new deferred gifts (at present value).

\(^2\)As of 2011, top fundraising programs are Business, Medicine, Athletics, IFAS, CLAS and Engineering.

\(^3\)Total Commitments v. Annual Fundraising expenditures

\(^4\)New non-endowed liquid gifts + annual endowment spendable transfers (excluding gifts in kind, non-endowed real estate gifts and pledges)

\(^5\)Profile established by reviewing board matrix