

UNIVERSITY OF KENTUCKY BOARD OF TRUSTEES

Jake Lemon, Vice President for Philanthropy and Alumni Engagement



AN EQUAL OPPORTUNITY UNIVERSITY

PHILANTHROPY AND ALUMNI ENGAGEMENT

Agenda

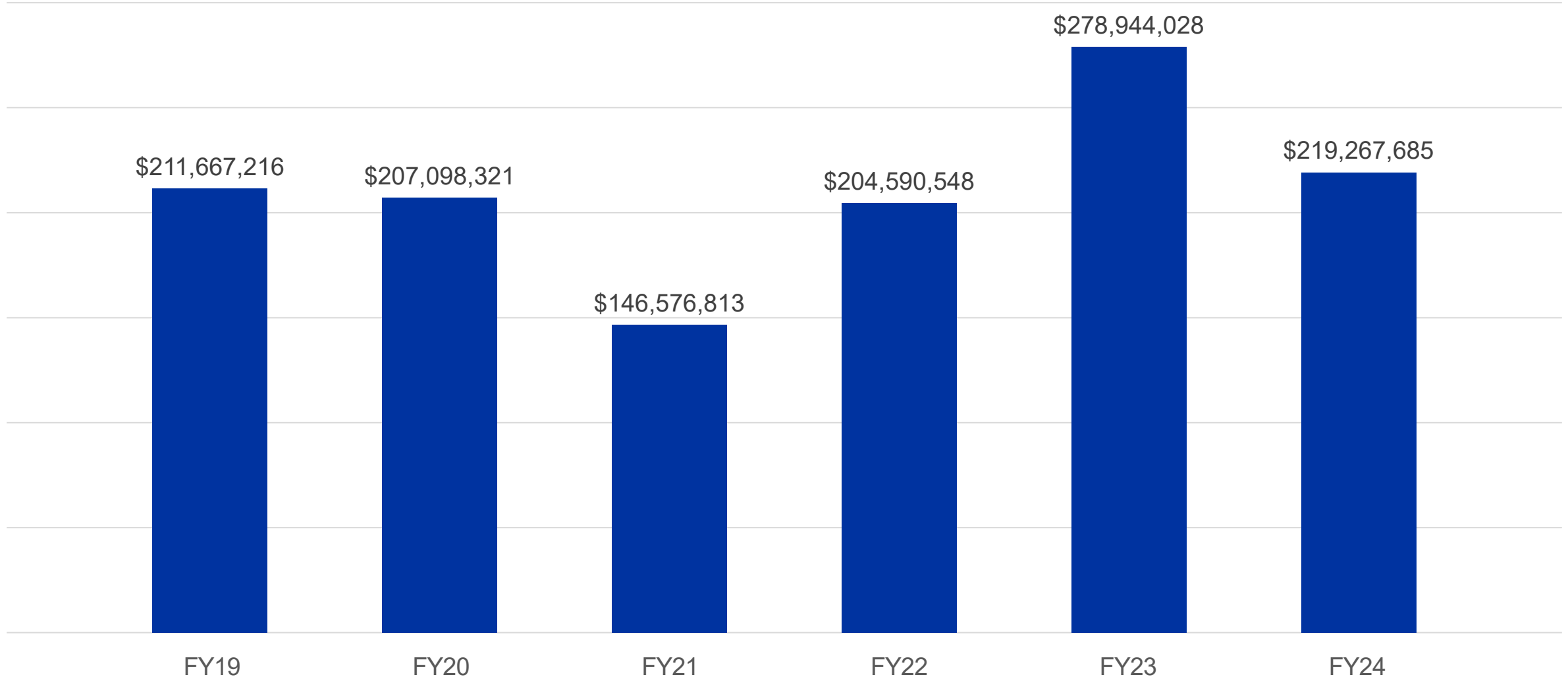
- Production/Comparison
- Scorecard Update
- New Associate Vice Presidents



PHILANTHROPY AND ALUMNI ENGAGEMENT

Production Trends

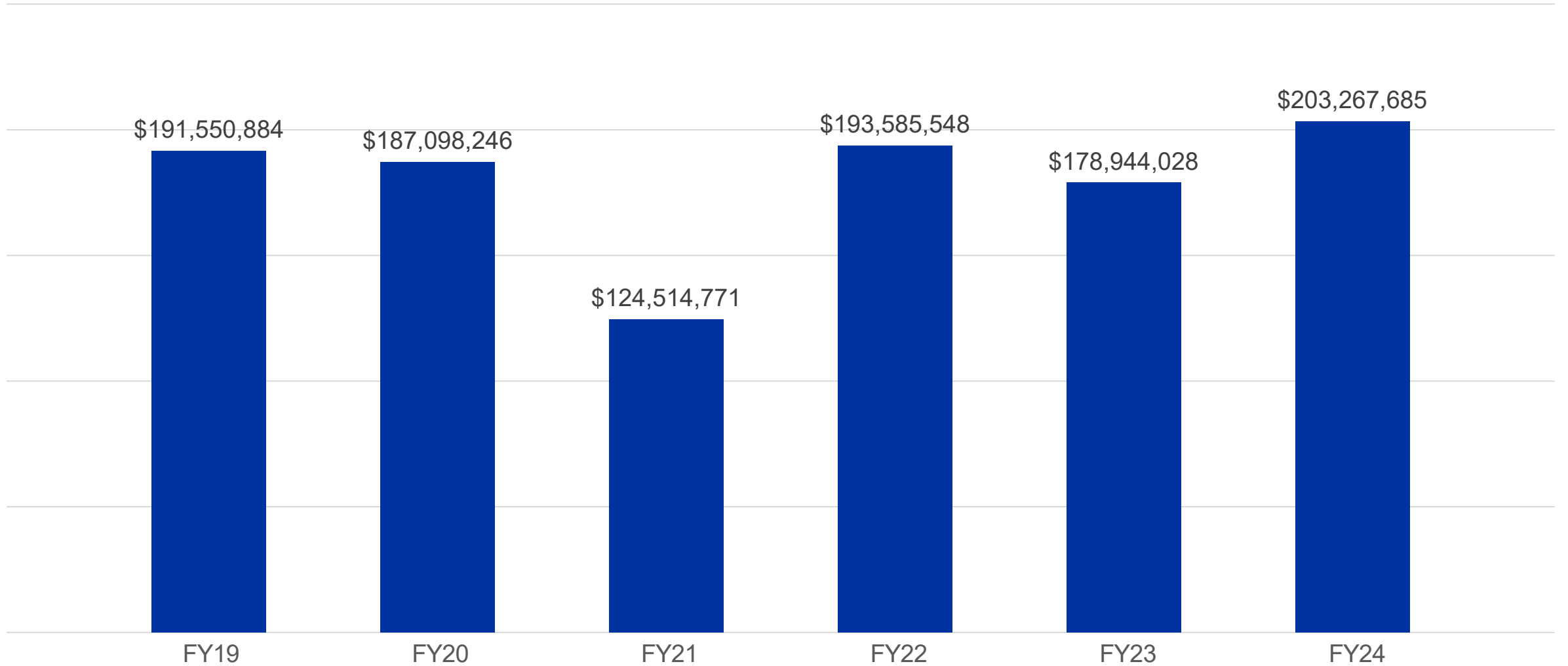
Fundraising Totals by Fiscal Year



PHILANTHROPY AND ALUMNI ENGAGEMENT

Production Trends

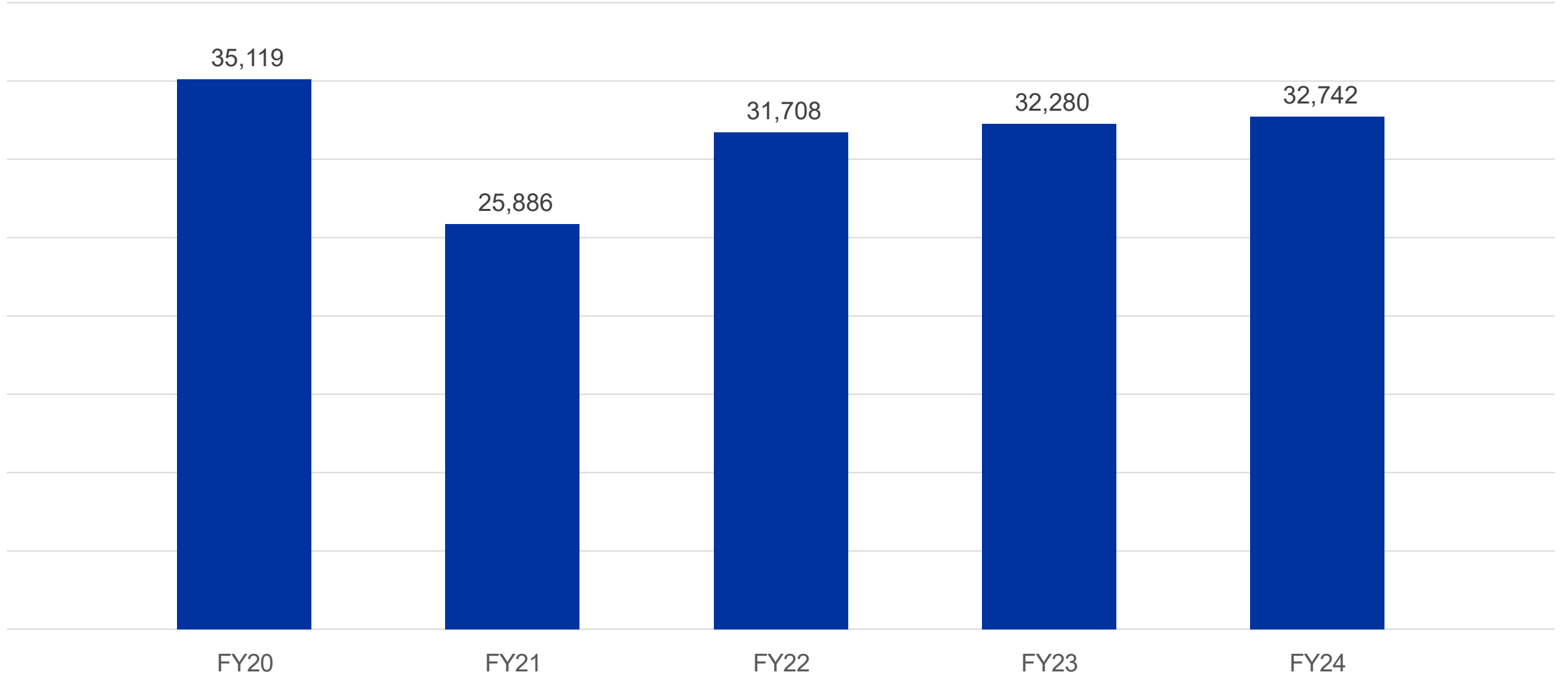
Fundraising Totals by Fiscal Year (largest gift removed)



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Production Trends

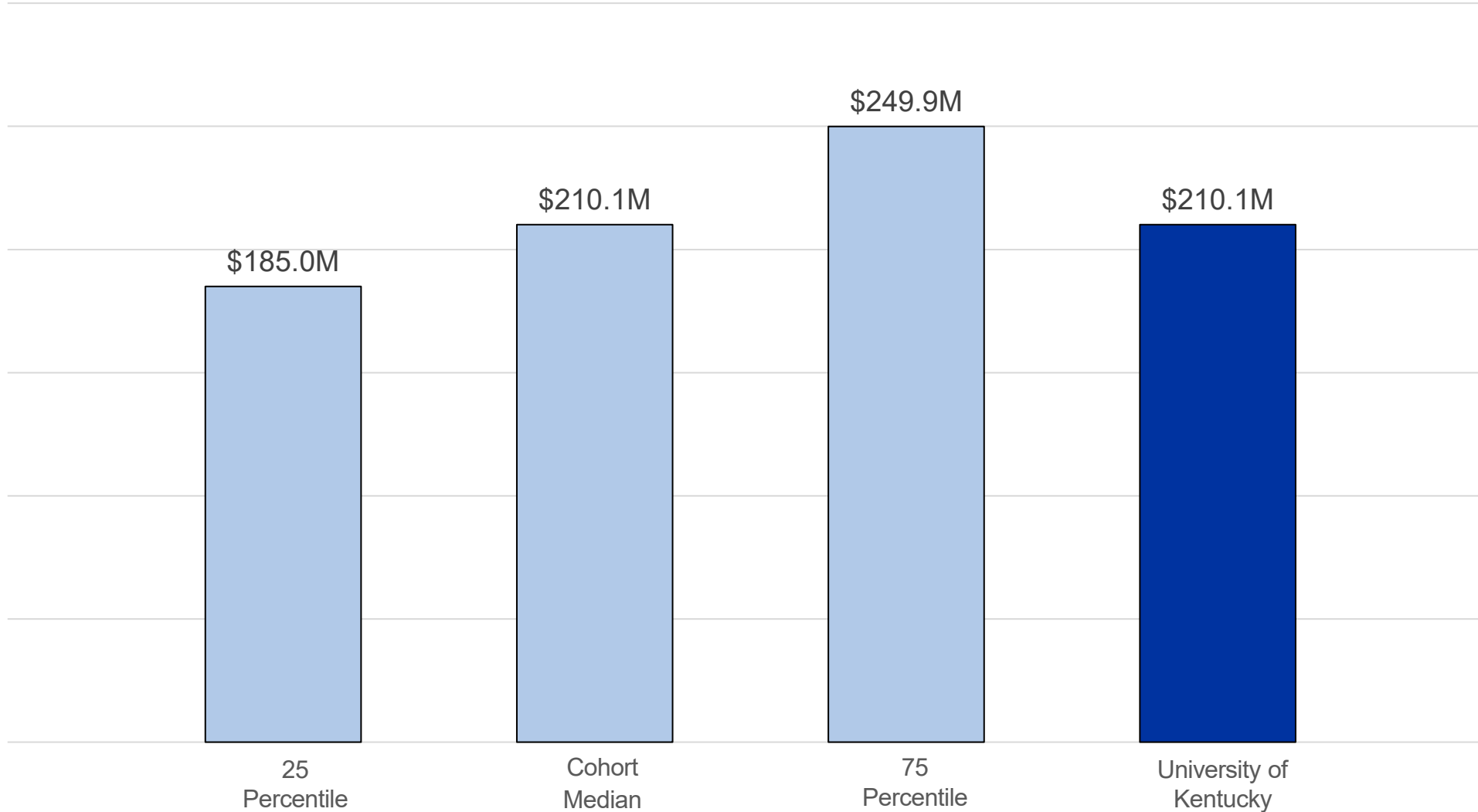
Total Donors by Fiscal Year



PHILANTHROPY AND ALUMNI ENGAGEMENT

Production Trends

Total Fundraising Production



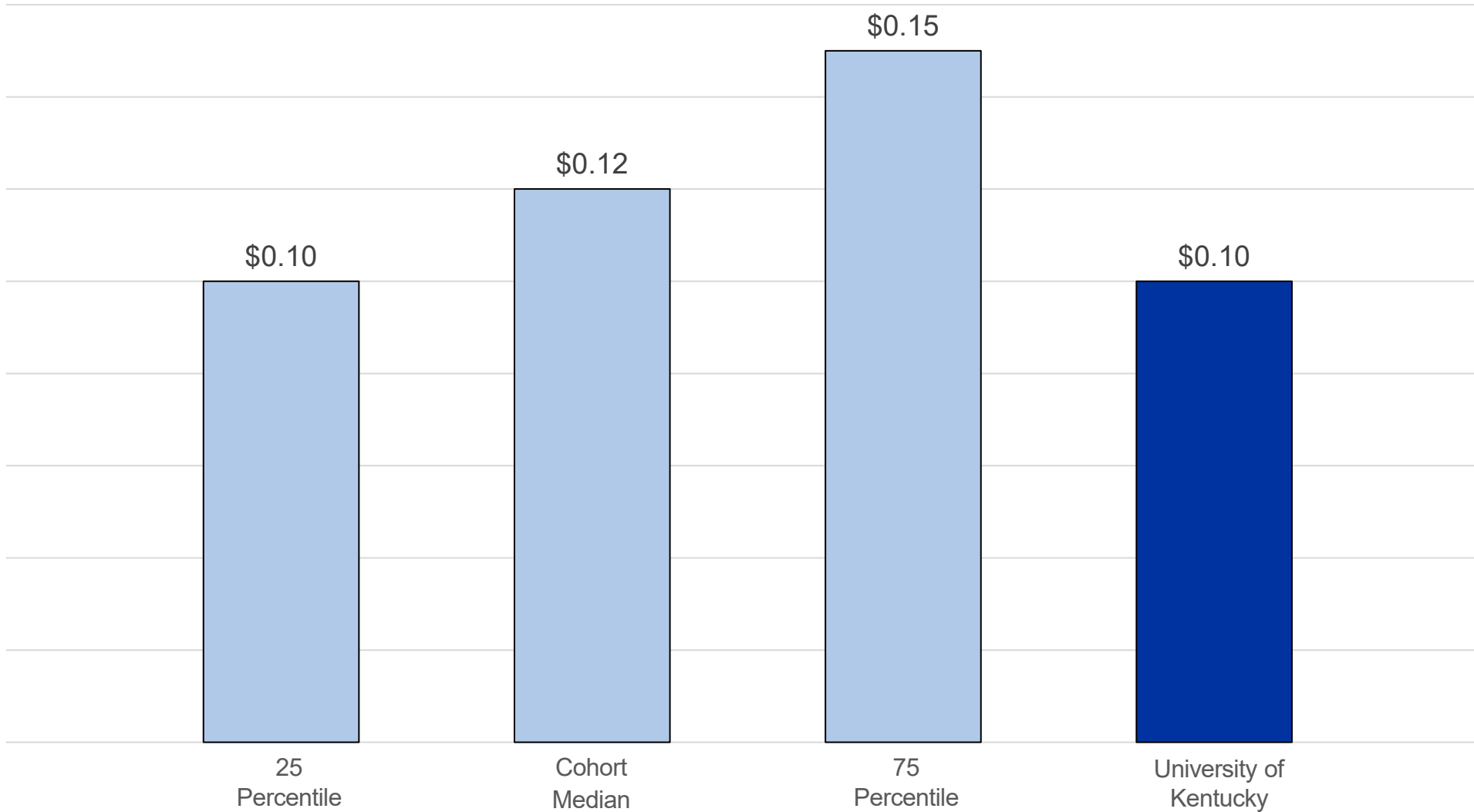
Fundraising production includes the full face value of new gifts/pledges. It excludes payments on past pledges.

To accurately capture each institution's typical performance, this data draws on the averages from three consecutive fiscal years "FY21-FY23".

PHILANTHROPY AND ALUMNI ENGAGEMENT

Production Trends

Cost to Raise a Dollar



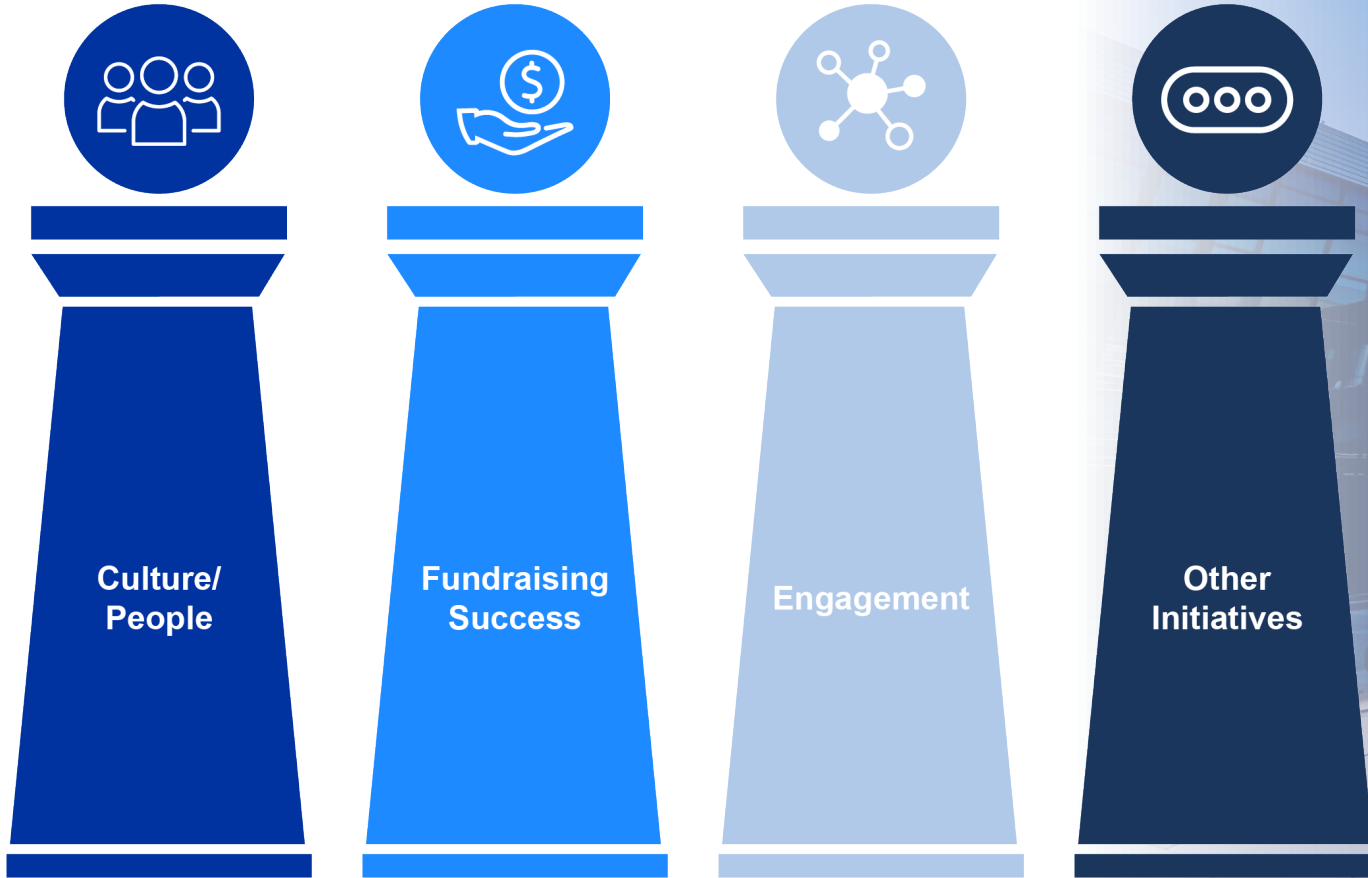
Cost to raise a dollar helps show the investment necessary to generate fundraising revenues. While it is a useful metric in the context of performance indicators, take care to consider it within the context of other performance indicators, especially net fundraising production.

Since institutions strive to minimize the cost to raise a dollar, the highest performers report the lowest values.

PHILANTHROPY AND ALUMNI ENGAGEMENT

Balanced Scorecard

Four Pillars of Focus



PHILANTHROPY AND ALUMNI ENGAGEMENT

Core Values — Culture

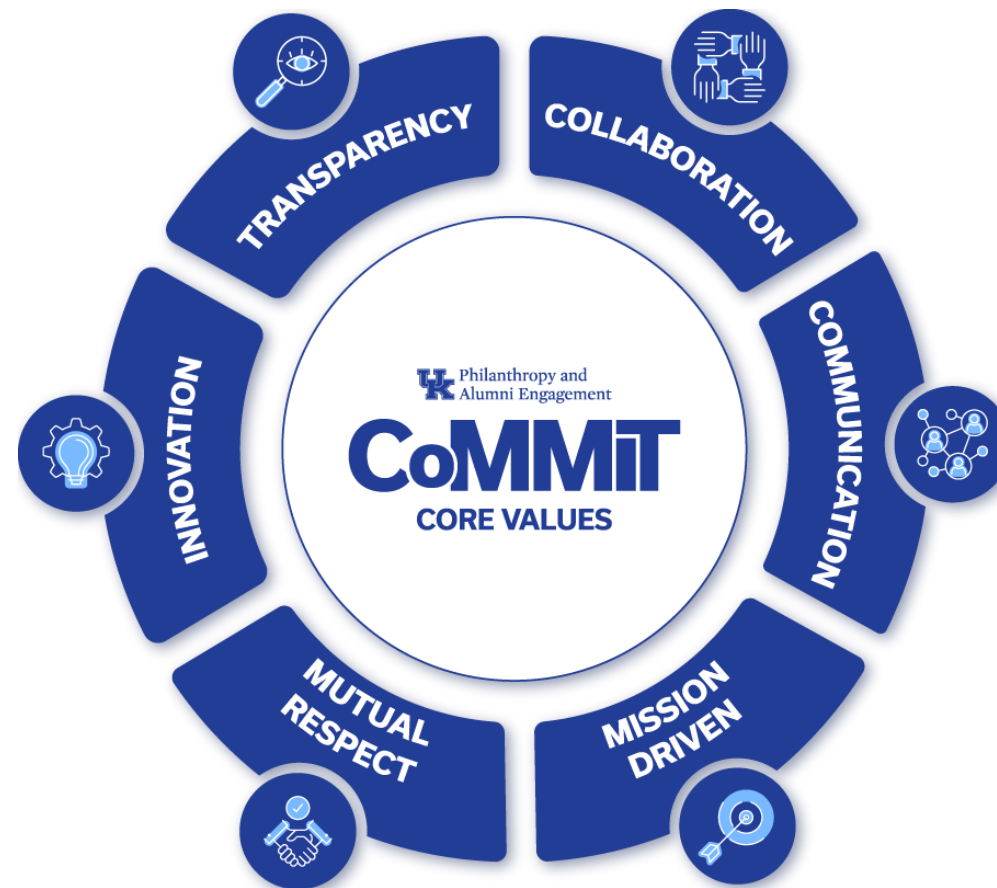
 Philanthropy and
Alumni Engagement

CoMMIT

CORE VALUES

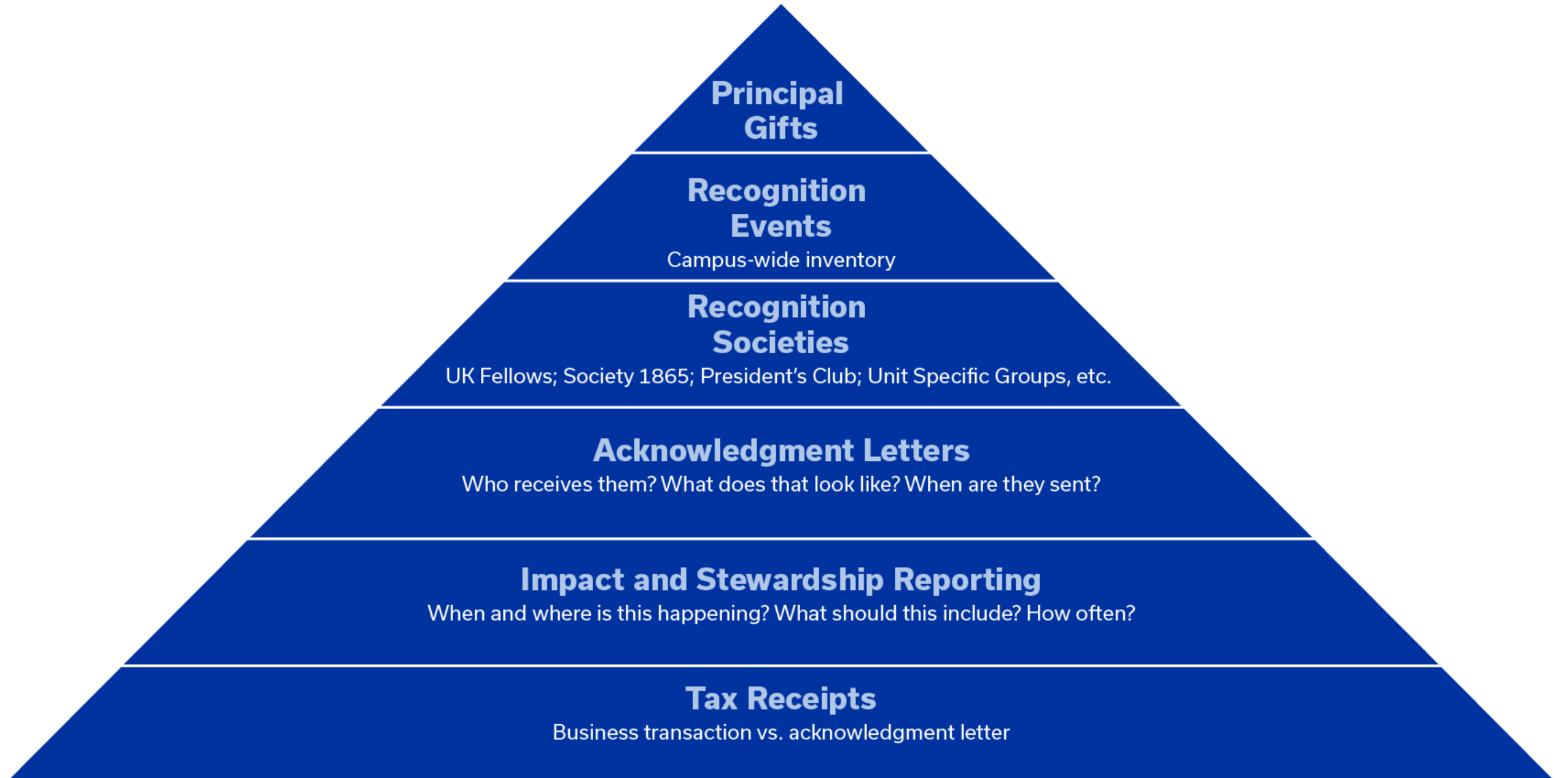
CoMMIT

CORE VALUES



PHILANTHROPY AND ALUMNI ENGAGEMENT

Building a Donor Relations and Stewardship Program — Fundraising Success



Overall Objective Goals

Create efficiencies for frontline officers as it relates to prospect discovery/relationship building

Expand coverage of our unassigned donor base by creating Donor Experience Officers (DXOs)

Deepen the engagement of our alumni and donor base

Develop an Engagement Score

Currently over half of our alumni/donor database is unassigned. Of those, 43,000 have the capacity to give between \$1,000 and \$24,999. Our goal is to increase engagement within this group of individuals.

Overall Objective Goals

Audit of historical
timelines and existing
processes

Subset by unit to
gauge bottlenecks in
processes

Identify process
enhancements to
reduce time to fund
creation

Establish clear
expectations for
timelines of fund
creation

PAE has a fiduciary responsibility to our donors to ensure their funds are deployed in a timely fashion, including the timeliness of creating the fund.

NEW ASSOCIATE VICE PRESIDENTS

PHILANTHROPY AND ALUMNI ENGAGEMENT

New Associate Vice Presidents



Mike Harders

Experience

Michigan Medicine
University of Toledo
Kennesaw State University

PHILANTHROPY AND ALUMNI ENGAGEMENT

New Associate Vice Presidents



Brandon McCray

Experience

Augusta University
Florida State University Foundation
University of Florida

JUST THE

BEGINNING |



Questions?