

PRIVATE GIVING GOVERNANCE REPORT

JULY 20, 2012 • Vice President for Development, Lisa Calvert



“Scholarship and philanthropy are each, separately, among the most powerful forces at work shaping the future of our society. In combination, they are unsurpassed in their capacity to improve the human condition.”

– Former University of Oregon President William Beaty Boyd

Measures of Success

Net Production – Result of all fundraising efforts in a fiscal year:

- Cash, securities, real estate and gifts-in-kind
- New pledges received (less any pledge payments received)
- Irrevocable and revocable deferred gifts
- Payments made on pledges booked in previous fiscal years are not counted

Gift Income – Assets transferred in a fiscal year:

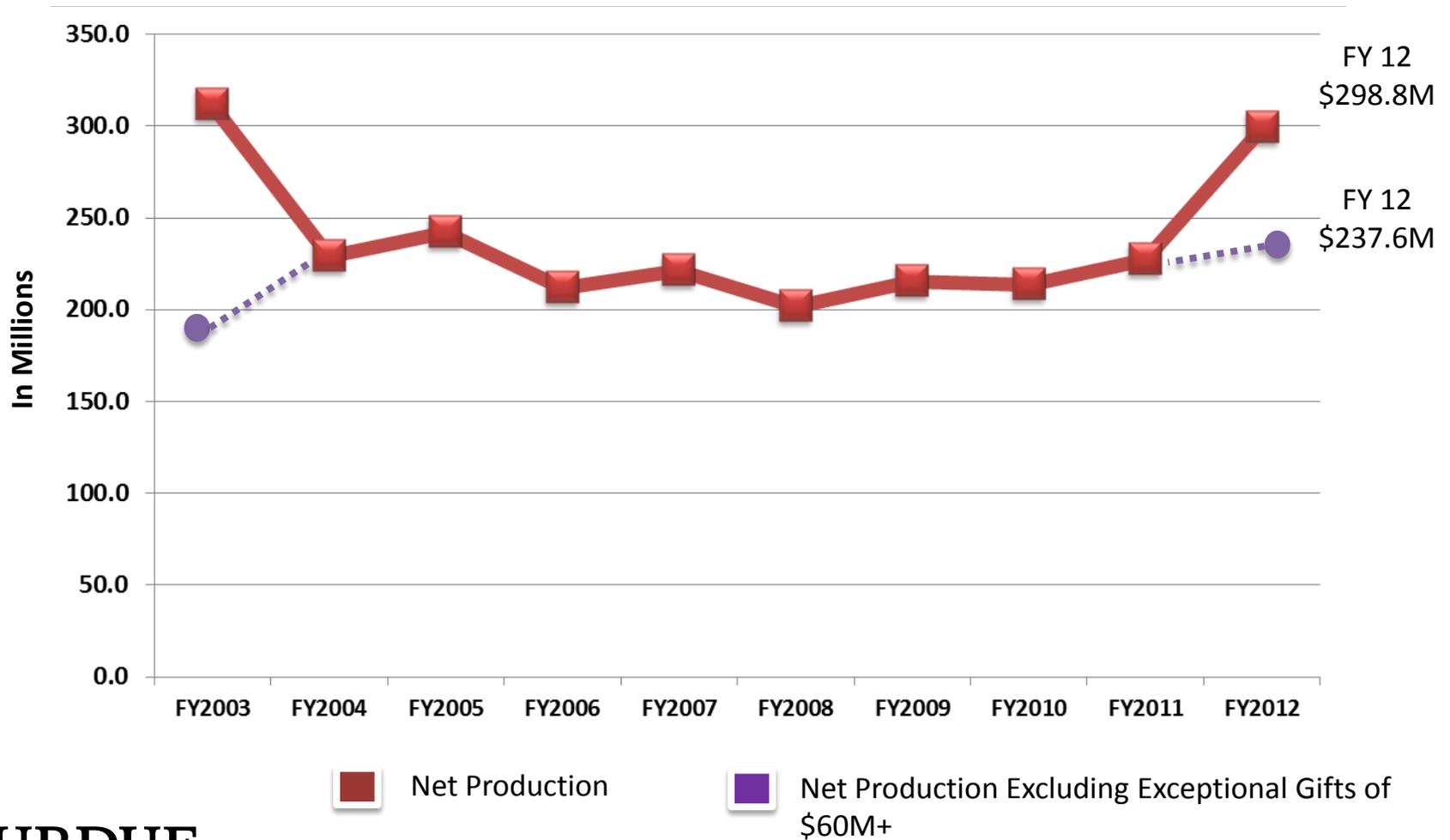
- Cash, securities, real estate and gifts-in-kind
- Irrevocable deferred gifts
- Revocable deferred gifts and pledges are not counted

Cash – All cash received in a fiscal year:

- Cash (new gifts and pledge payments) and securities
- Realized bequests

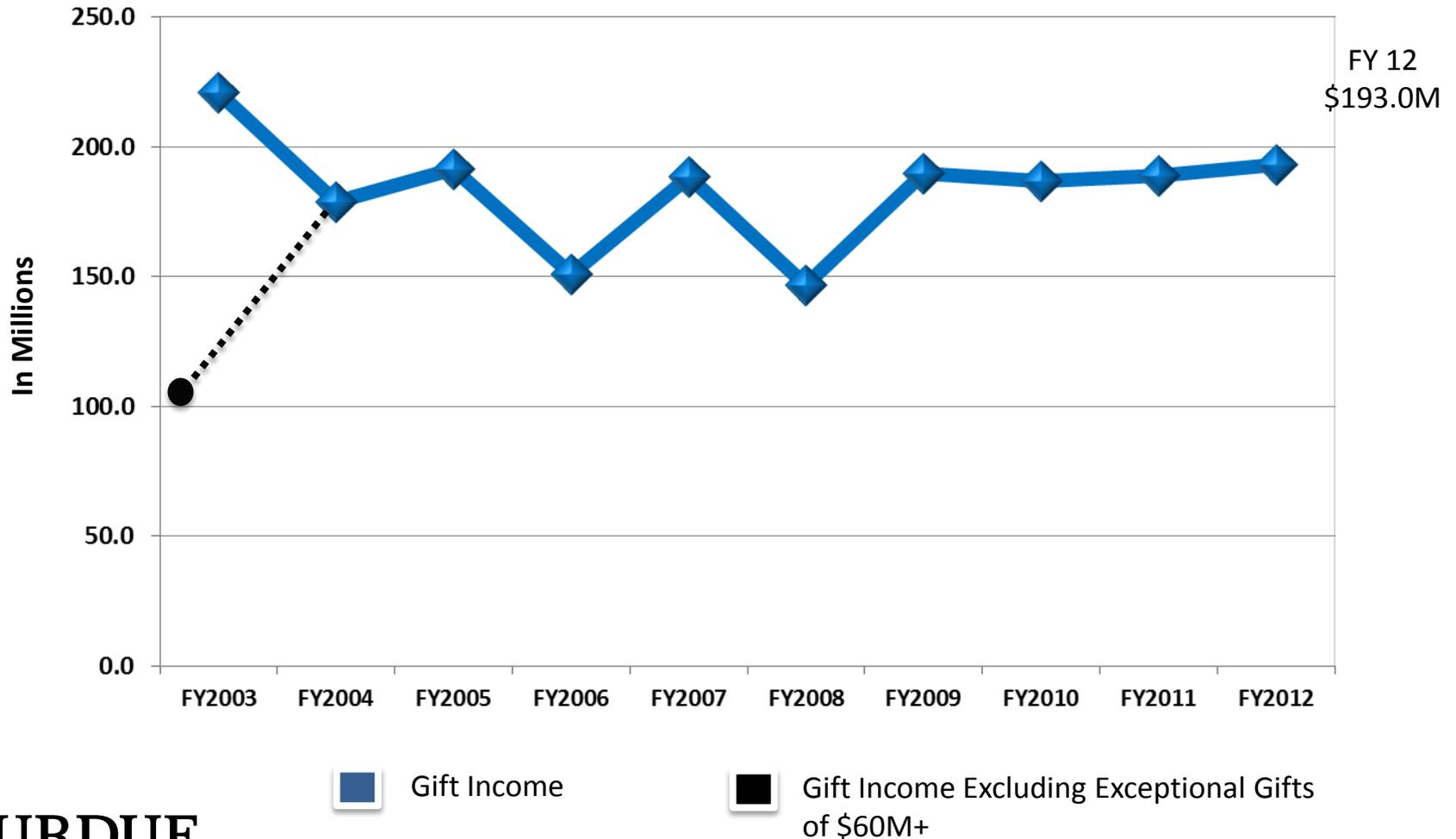
Performance (FY 2003 – 2012)

Metric: Net Production



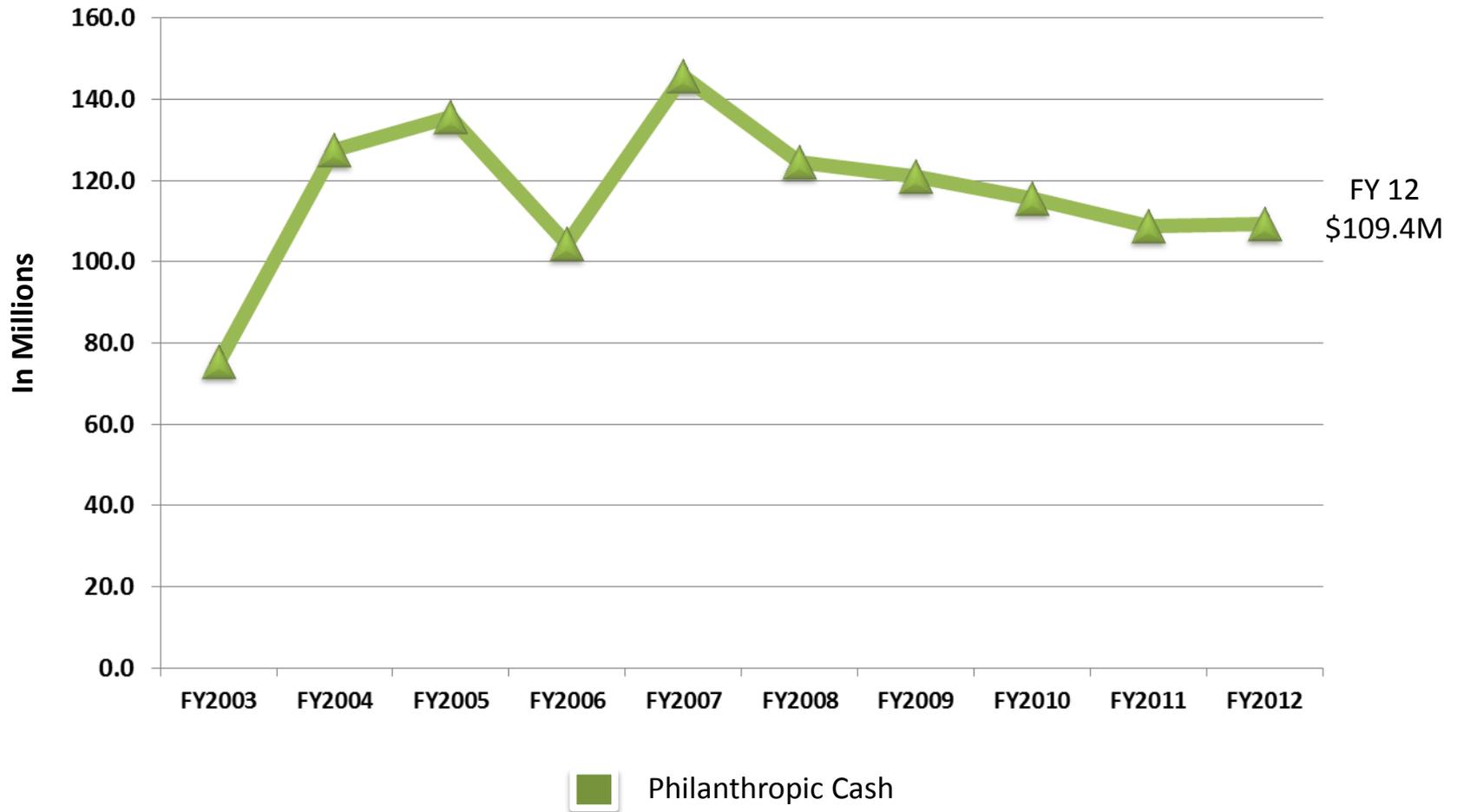
Performance (FY 2003 – 2012)

Metric: Gift Income



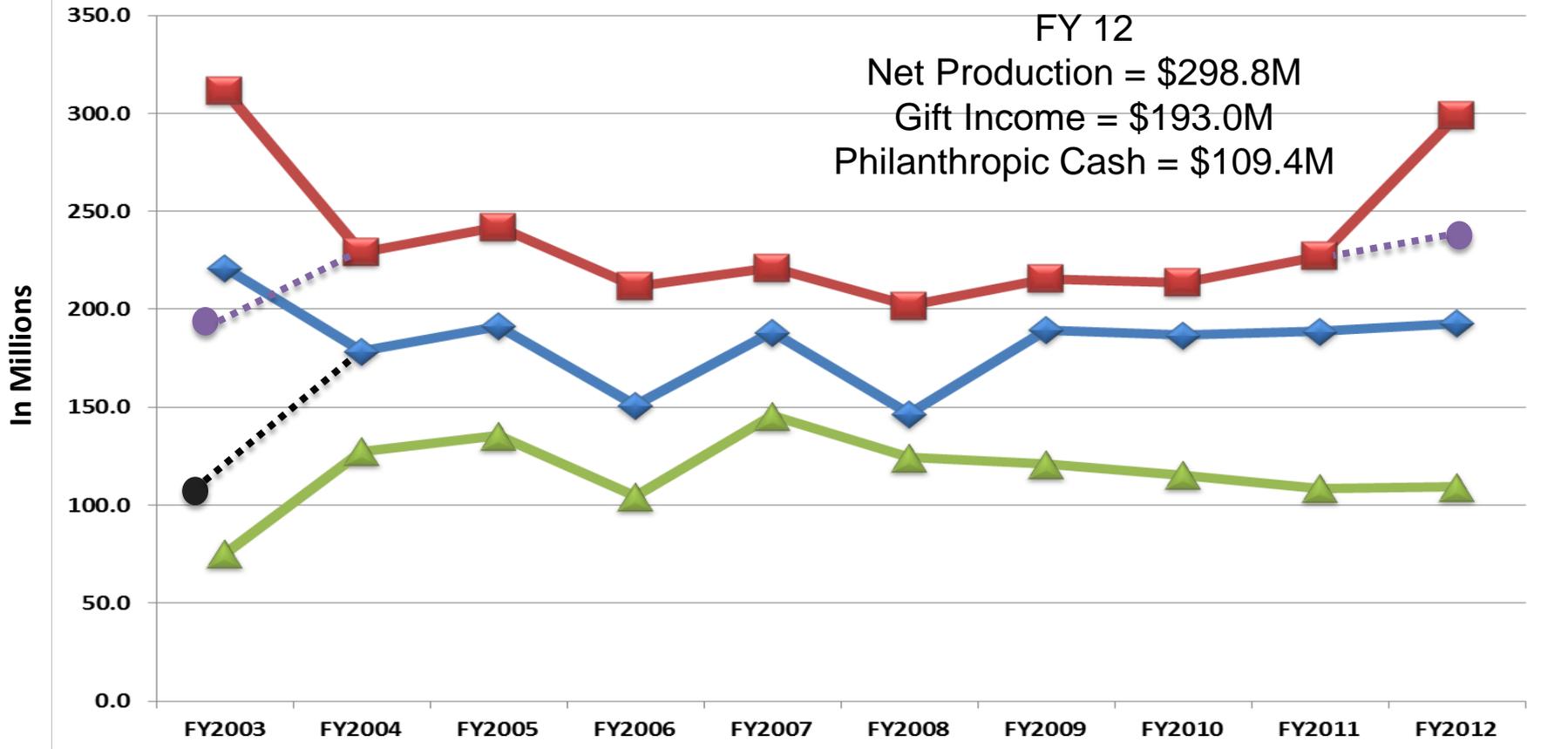
Performance (FY 2003 – 2012)

Metric: Philanthropic Cash



Performance (FY 2003 – 2012)

Range of Metrics Captures Performance



Three Pillars of a Successful Philanthropic Effort



- **Bold Ideas** – The bolder the better. Donors give in response to a dynamic vision and bold academic agenda
- **Philanthropic Capacity** – Wealth-screening analyses balanced with affinity models confirm that donor base has both capacity and proclivity to invest in Purdue
- **Infrastructure** – Right balance between staff and volunteer leadership to accomplish labor intensive work of qualifying, cultivating, soliciting and stewarding potential donors

FY 2012 Program Highlights

1. School and college philanthropic capacity analyses

- Eleven universities implemented more than one \$1B+ campaigns at Purdue's identified capacity
- Accumulation of university, school and college philanthropic capacity analyses based on peer data is new
- Decadal Funding Plan 10 year forecasts
 - Preliminary inventory of planned gifts



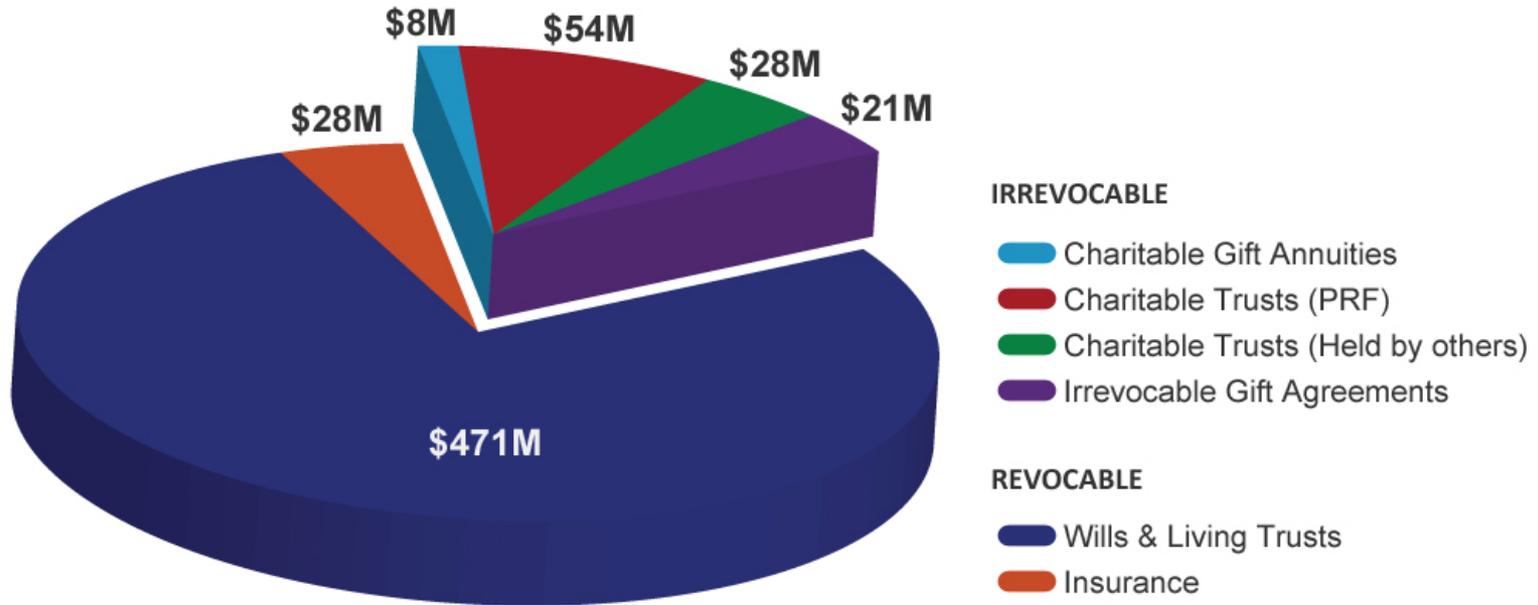
Preliminary Inventory of Planned Gifts

as of 6/30/2012

Irrevocable = \$111 M

Revocable = \$499 M

Total = \$610 M



FY 2012 Program Highlights

2. Realignment of central development

- Best practice staffing model
- Realign resources to philanthropic potential
- New expertise required to support change in productivity
- Recognize record of success, provide career paths and incorporate new and innovative methodology
- Principal Gifts, Corporate and Foundations, Planned Giving and Development Operations

3. Strategic philanthropic communication to support a presidential transition

- Consistent university-wide schools and colleges messaging

Looking Forward FY 2013

1. Bold fundable philanthropic case

2. Strategic growth and alignment university, schools and colleges

- Alignment of more than 20,000 potential donors
- Different stages of program maturity
- Identify program staffing and resource gaps and clarify functions



3. Investment forecast and self-funding model

- Peer and aspirant budgets will be studied and benchmarked

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