



University of California
San Francisco

advancing health worldwide™

**University Development
and Alumni Relations**

*Michael Irwin, Interim
Associate Vice Chancellor*

*Steve Downs, Executive
Director*

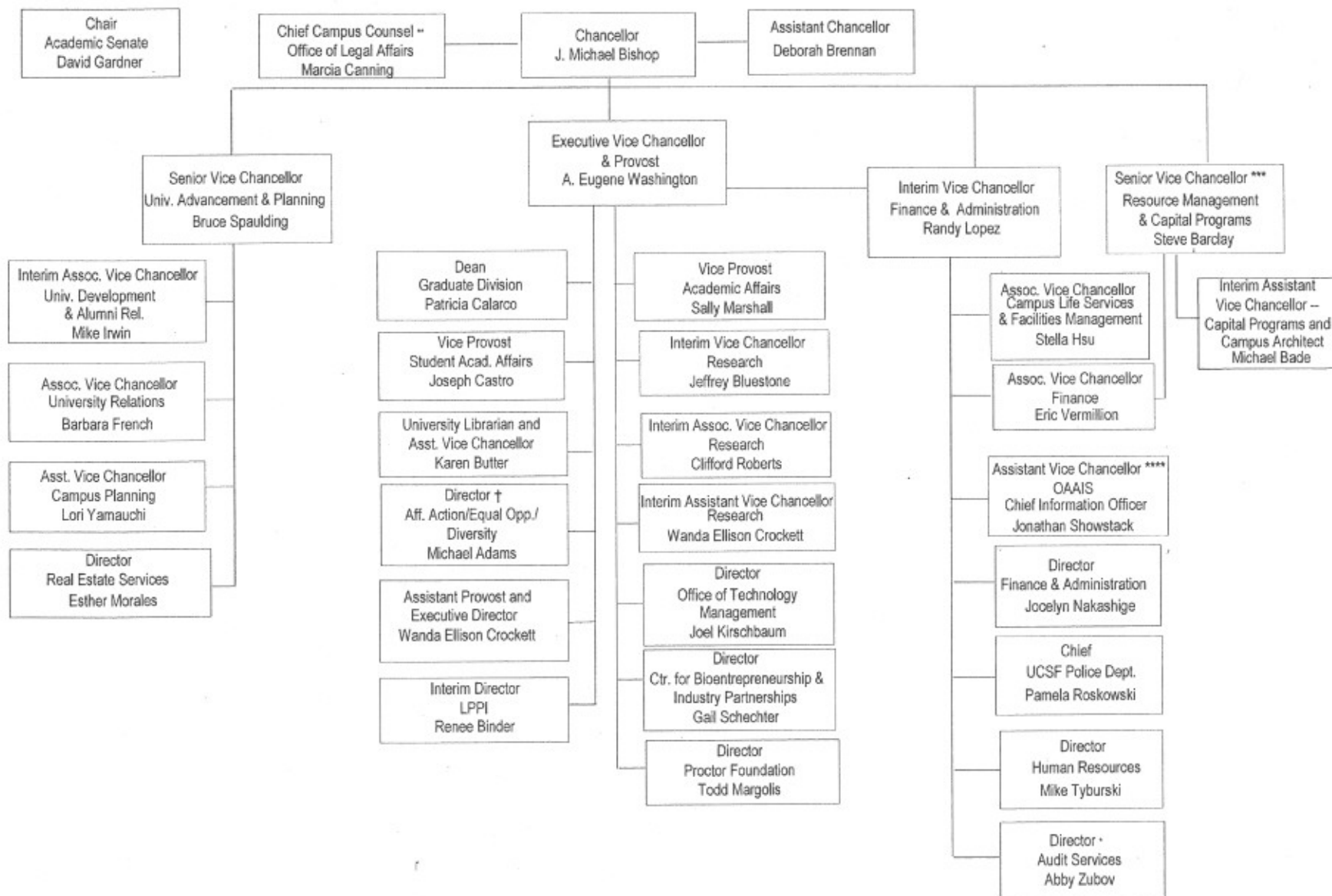
UCSF Development and Alumni Relations Overview

Committee on Faculty Welfare

March 24, 2009

UNIVERSITY OF CALIFORNIA, SAN FRANCISCO

CENTRAL CAMPUS ADMINISTRATION



Michael D. Irwin
Interim Associate Vice Chancellor
University Development Alumni Relations

**Financial Services &
Administration**
**Steve Downs, Executive
Director**

- Business Affairs
- Gift Administration
- Human Resources
- Information Systems
- UCSF Foundation Finance

University Development
**Joseph Neisen, Executive
Director**

- Development Officers
- Alumni Relations Officers

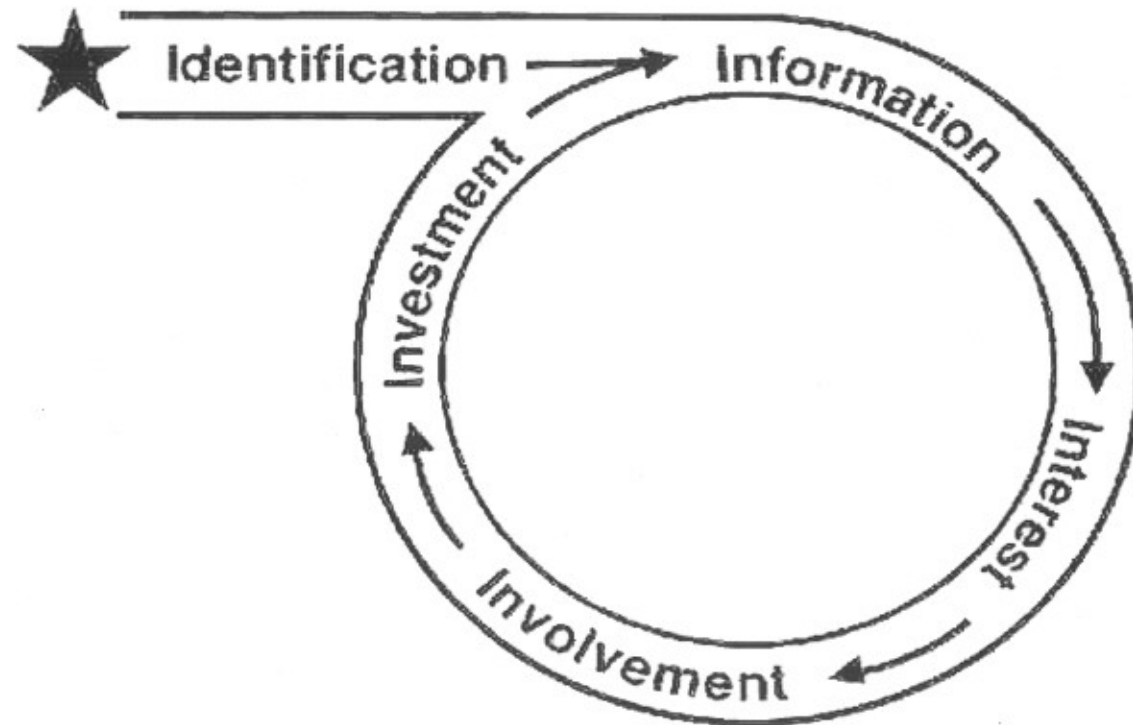
Development/Alumni Services
**Linda E. Williams, Executive
Director**

- Annual Giving
- Alumni Services
- Development Communications
- Development Research
- Donor Relations/Stewardship
- Special Events

Planned Giving
**Dan Riley,
Executive Director**

**Corporate &
Foundation
Relations**
Jeff Ellis, Director

The Five I's



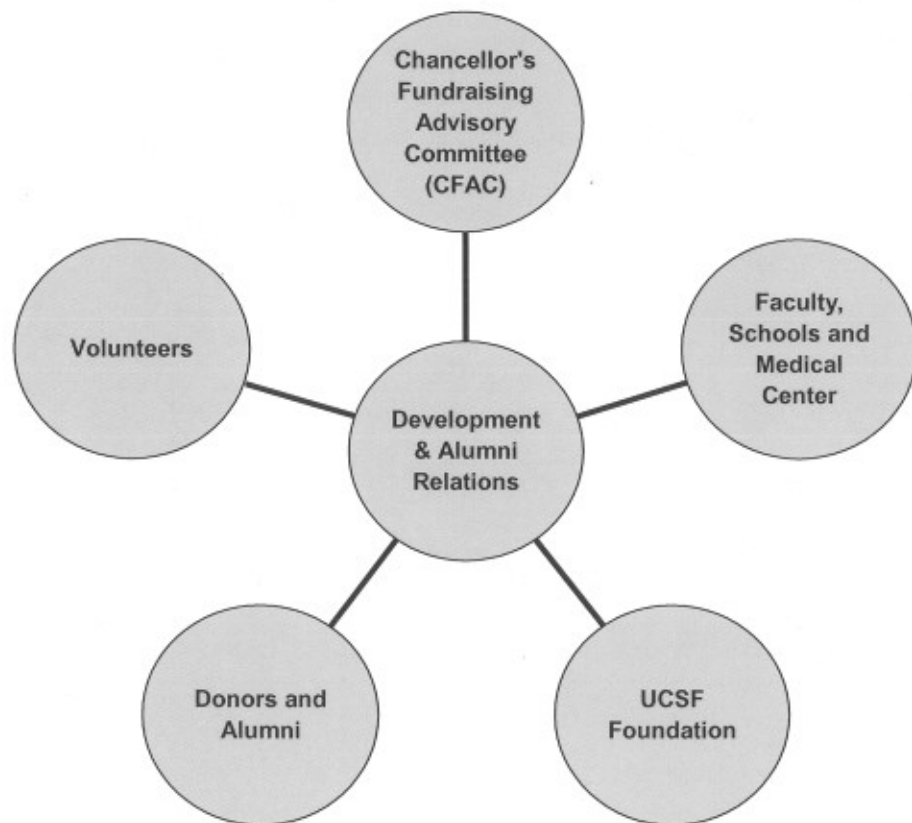
UDAR'S MISSION AND VISION

- **MISSION** - To support UCSF through the development and stewardship of private resources.
- **VISION** - UDAR is an essential partner in achieving UCSF's mission of "Advancing Health Worldwide".

Resources Provided by UDAR

- **Help in Identifying Potential Donors**
- **Research on Prospects**
- **Clearance for Approaching Prospects**
- **Design Strategies for Cultivating and Soliciting Prospects**
- **Plan and Attend Cultivation and Solicitation Meetings**
- **Formulate Requests That Will Maximize Gifts**
- **Written Materials to Present to Prospects**
- **Services for Gift Entry, Receipting and Recordkeeping**
- **Acknowledge Gifts Promptly – The First Step in Cultivation for the Next Gift**
- **Ensure Recognition of Donors for Their Gifts**

UDAR's Professionals Help UCSF Meet Its Private Fundraising Potential



Strategy

Identification

Communication

Coordination

Stewardship

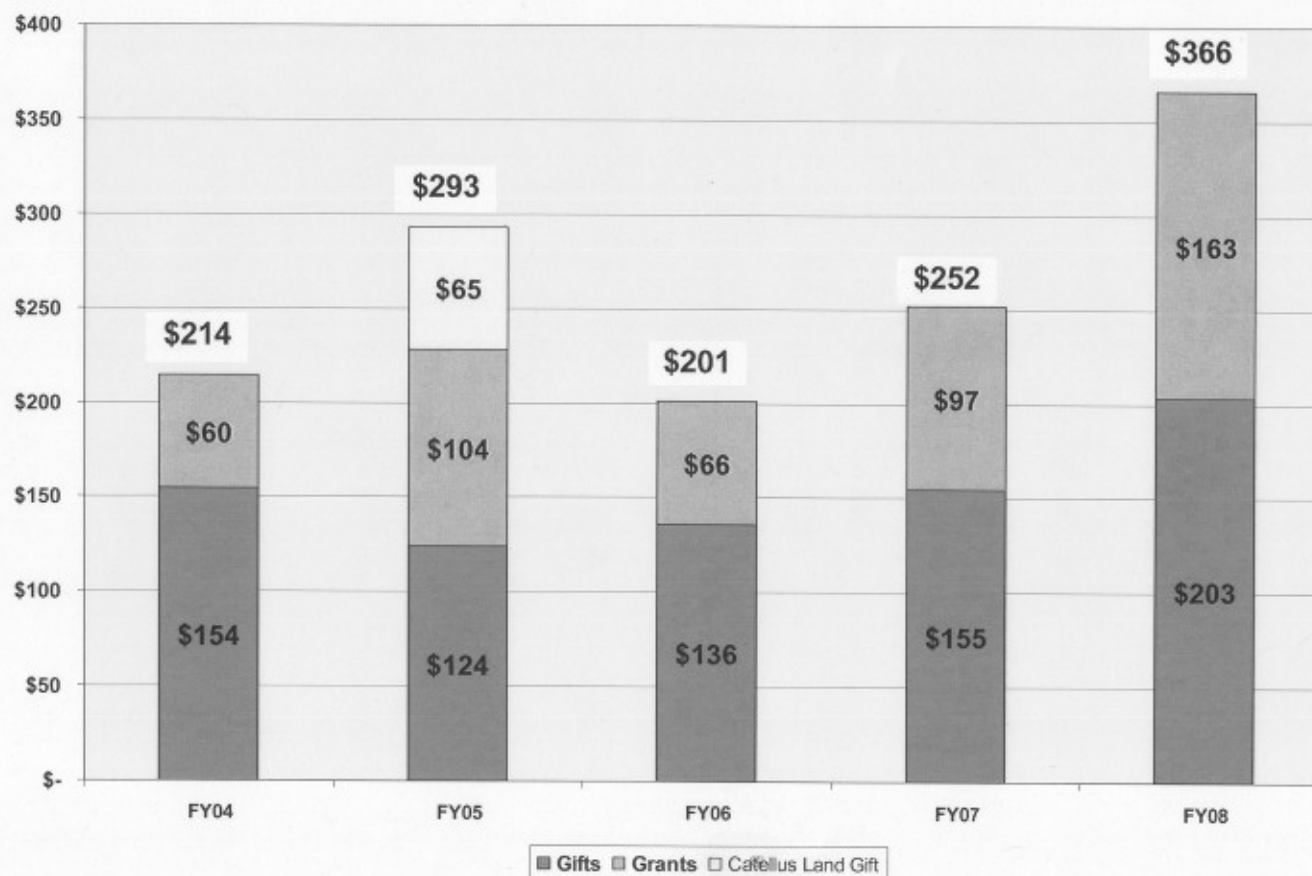
Execution of Campaigns, Appeals, Events

Structuring gifts and bequests

Endowment and Trusts

Administration

Private Support to UCSF Annual Totals (CAE)



	Top 20 Fundraising Institutions, 2008	Amount Raised in Millions
		2008
1	Stanford University (CA)	\$785
2	Harvard University (MA)	\$651
3	Columbia University (NY)	\$495
4	Yale University (CT)	\$487
5	University of Pennsylvania (PA)	\$476
6	University of California, Los Angeles (CA)	\$457
7	Johns Hopkins University (MD)	\$449
8	University of Wisconsin-Madison (WI)	\$410
9	Cornell University (NY)	\$409
10	University of Southern California (CA)	\$409
11	Indiana University (IN)	\$409
12	New York University (NY)	\$388
13	Duke University (NC)	\$386
14	University of California, San Francisco (CA)	\$366
15	University of Michigan (MI)	\$333
16	Massachusetts Institute of Technology (MA)	\$312
17	University of Minnesota (MN)	\$308
18	University of Washington (WA)	\$303
19	University of North Carolina at Chapel Hill (NC)	\$292
20	University of California, Berkeley (CA)	\$285

Source: Council for Aid to Education, 2009

**University of California
Cost of Fundraising
FY2005-2006**

Institution	Total Advancement Expenditures	Total Private Support	Cost per Dollar Raised	Net \$ Yield to Institution
Santa Barbara	\$ 10,229,383	\$ 55,566,230	\$ 0.184	\$ 45,336,847
Los Angeles	\$ 57,489,743	\$ 319,580,552	\$ 0.180	\$ 262,090,809
Davis	\$ 13,298,139	\$ 77,670,221	\$ 0.171	\$ 64,372,082
Berkeley	\$ 41,117,235	\$ 245,966,241	\$ 0.167	\$ 204,849,006
Riverside	\$ 4,431,284	\$ 30,276,324	\$ 0.146	\$ 25,845,040
Santa Cruz	\$ 3,455,298	\$ 26,050,711	\$ 0.133	\$ 22,595,413
Irvine	\$ 8,825,856	\$ 84,075,243	\$ 0.105	\$ 75,249,387
San Diego	\$ 15,396,135	\$ 184,925,371	\$ 0.083	\$ 169,529,236
San Francisco	\$ 14,334,571	\$ 201,206,363	\$ 0.071	\$ 186,871,792
Merced	\$ 834,204	\$ 12,599,955	\$ 0.066	\$ 11,765,751
Mean	\$ 16,941,185	\$ 123,791,721	\$ 0.131	\$ 106,850,536
Median	\$ 11,763,761	\$ 80,872,732	\$ 0.139	\$ 69,810,735
Total	\$ 169,411,848	\$1,237,917,211	\$ 0.137	\$1,068,505,363

AAMC FUNDRAISING SURVEY FY2005-2006

Institution	Total Development Costs	Total Private Support	% Of Cost To Support
University of Michigan Medical School	\$ 7.8	\$ 71.5	10.97%
Duke University Medical Center	\$ 9.0	\$ 87.8	10.24%
Yale School of Medicine/New Haven Hospital	\$ 6.0	\$ 73.7	8.14%
Stanford University and Stanford Hospital and Clinics	\$ 9.2	\$ 115.3	7.99%
Medical and Health Sciences Foundation	\$ 5.7	\$ 79.0	7.23%
AVERAGE OF ABOVE RESPONDENTS (5)	\$ 7.6	\$ 85.4	8.84%
AVERAGE OF ALL RESPONDENTS (122)	\$ 3.5	\$ 41.3	8.51%

UCSF COST OF FUNDRAISING FY2008-2009

Expenditures Projection:	
UDAR Budget Funds	\$19,830,000
Departmental Direct Support	3,670,000
Total	\$23,500,000
Total Private Support	\$283,300,000
COST PER \$ RAISED	\$0.0830

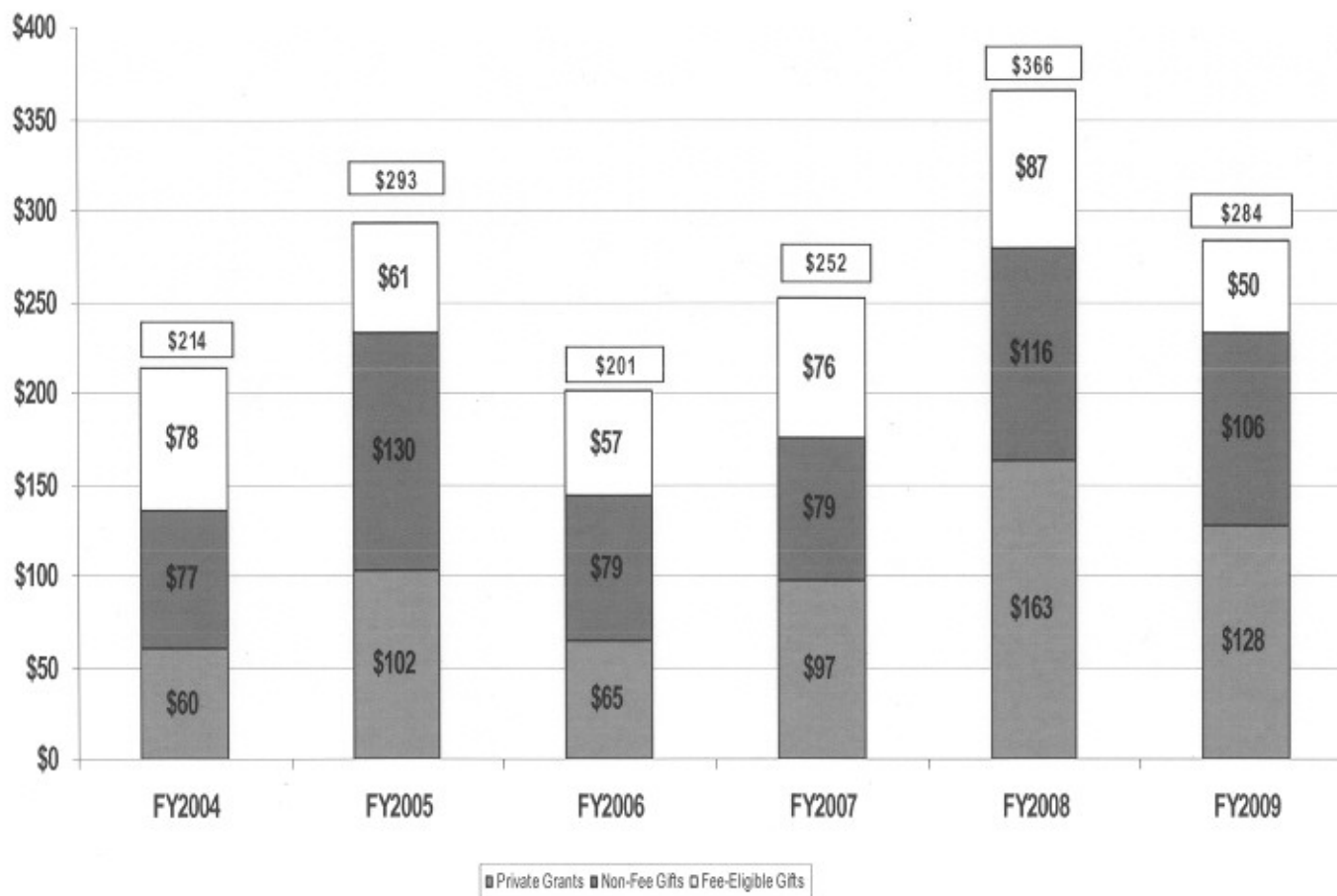
A Large Deficit is Expected Under the Current Funding Model

	BUDGETED		PROJECTED		DEFICIT
GIFT FEE:		\$ 3,500,000		\$ 2,000,000	\$ (1,500,000)
Fee Eligible Gifts	\$ 92,500,000		\$ 50,000,000		
Average Rate	3.75%		4.00%		
SPENDING FEE:		\$ -		\$ 1,000,000	\$ 1,000,000
Fee Eligible Gifts	NA		\$ 100,000,000		
Rate			1.00%		
FOUNDATION ADMINISTRATIVE FEE:		\$ 2,000,000		\$ 1,300,000	\$ (700,000)
Endowment Pool	\$ 480,000,000		\$ 370,000,000		
Rate	0.40%		0.35%		
STIP ASSESSMENT:		\$ 14,200,000		\$ 8,900,000	\$ (5,300,000)
Unspent Gifts and Endowment Income	\$ 315,000,000		\$ 320,000,000		
STIP Assessment	100.00%		75.00%		
STIP Rate	4.50%		3.70%		
TOTAL		\$ 19,700,000		\$ 13,200,000	\$ (6,500,000)

Limits on Gift and Spending Fees

- Many gifts are exempt from fees providing no funding for development activities.
- 2009 budget assumed “fee eligible” gifts of \$92.5 million producing \$3.5 million in funding or 18% of total funding requirement.
- Actual fundraising has been directed at capital programs which are exempt from fees.
- Projected fee eligible gifts are \$50 million, producing \$2.0 million in funding or shortfall of \$1.5 million.

Less than 30% of private support is subject to Gift and Spending Fees. In 2009 it is projected to be only 18%.



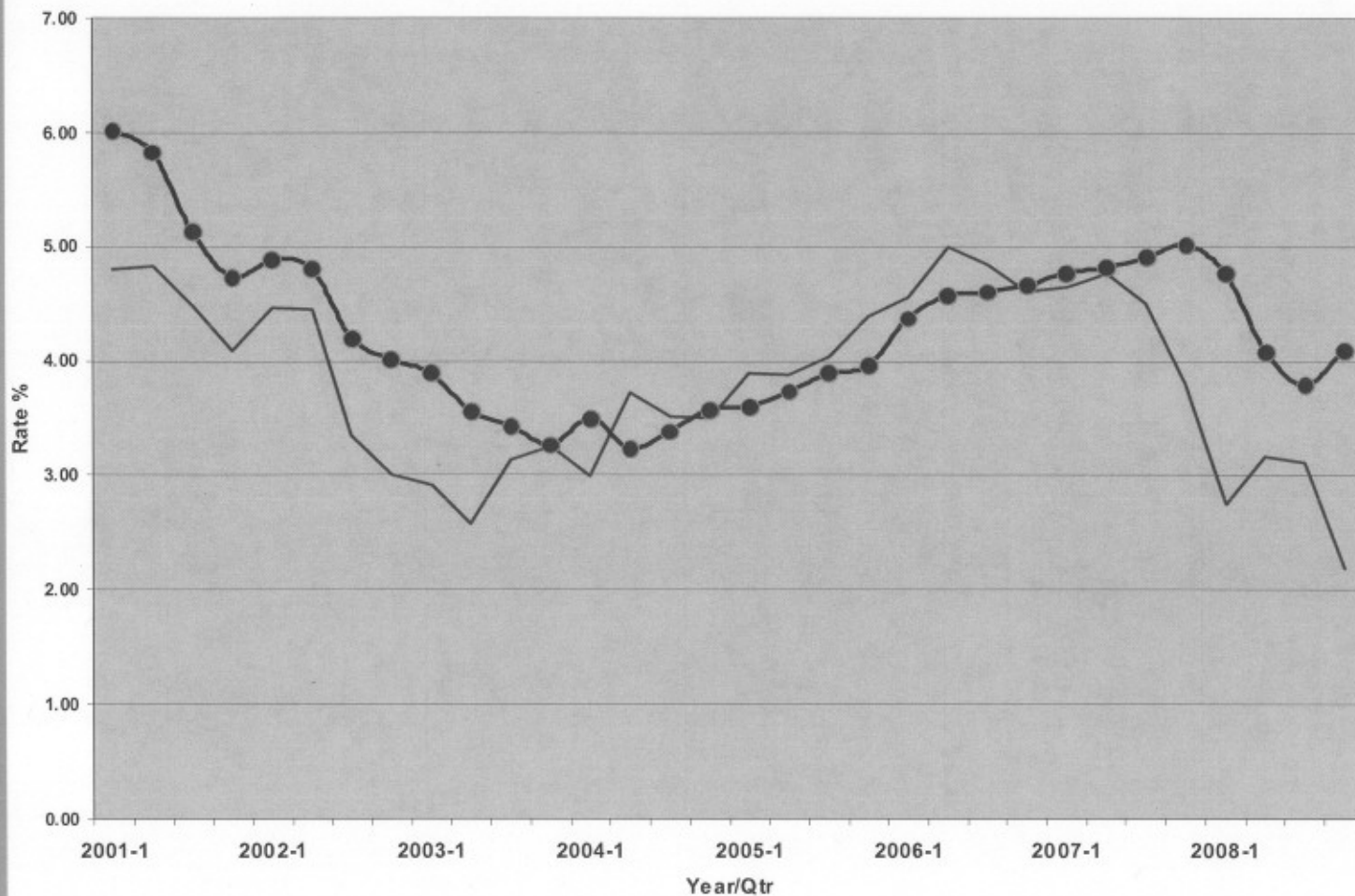
The STIP assessment is falling short of its funding objective.

	FY 2009 Budget	FY 2009 Projection	Projected Deficit
Unexpended Funds	\$315 mi.	\$320 mil.	
% Assessment	100%	75%	
STIP Rate	4.5%	3.7%	
Net STIP Assessment	\$14.2 mil	\$8.9 mil	(\$5.3 mil)

- Raising assessment to 100% from 75% generates \$2.9 million at current 3.7% STIP rate, far short of deficit from falling rates.

Money rates are pushing STIP below 4.5% for the foreseeable future.

STIP compared to 5 yr Treasury Rates



UCSF

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