

UNIVERSITY OF UTAH

Undergraduate Advancement
2012-2013
Annual Report

Compiled by

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Director*

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UNDERGRADUATE ADVANCEMENT OVERVIEW

The Office for Undergraduate Advancement was created in 2002 in response to the fundraising needs of Academic Affairs and Student Affairs which, jointly and independently, provide programs to support and retain undergraduate students at the University of Utah.

The Director of Undergraduate Advancement reports to the Vice President of Student Affairs, Barbara Snyder, and the Associate Vice President of Academic Affairs, Martha Bradley.

The Director works closely with senior University leadership to forward Student Affairs and Academic Affairs fundraising goals, including funding for capital campaigns as well as annual scholarships, internships, and assistantships. In 2012/13 Undergraduate Advancement successfully completed the \$7.5M Student Life Center campaign and broke ground on the building in April of 2013.

Undergraduate Advancement's community advocacy board, the Board of Advisors for Undergraduate Advancement, assists in community outreach efforts and provides financial support for priorities.

Parents are a dedicated constituency for Undergraduate Advancement outreach and engagement. Backed by an eleven year giving history to the Parent Fund, we anticipate continued significant growth in this area. To date, opportunities for building community partnerships on behalf of Student Affairs and Academic Affairs priorities have only been superficially tapped.

In 2010/11, the Office for Undergraduate Advancement had oversight of \$639,850 in predominantly annual scholarships, awards and grant funding and served over 125 students. In 2012/13 we worked to shift many of these scholarships to areas that were more naturally aligned with the goals of the scholarship. In 2013/14 we plan to further this by working closely with the Office of Financial Aid to transition day to day scholarship management out of Undergraduate Advancement.

Prospect Identification and Cultivation

Through deepening our level of engagement with members of the Board of Advisors for Undergraduate Advancement (BAUA) and expanding campaign volunteer networks, Undergraduate Advancement continues to grow, strengthen and articulate Student and Academic Affairs programs in order to better serve students.

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Stewardship

Now in its sixth year, the Office for Undergraduate Advancement stewardship program ensures regular contact with scholarship donors throughout the year. Touch points include:

- Invitation to the annual Undergraduate Advancement Fall Scholarship Luncheon
- Participation in scholar selection (if desired)
- Thank you note from scholarship recipient(s)
- End of year report with a historical look at all scholarship recipients funded since the scholarship's inception. The packet also includes thank you cards from scholarship recipient(s) and a cover letter from Barb and Martha. This is either hand delivered or mailed to the donor.

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UNDERGRADUATE ADVANCEMENT HIGHLIGHTS

- With total giving at \$2.5M, Undergraduate Advancement giving is up 28%. This is a record year in giving since the program's inception in 2002/03.
- Set the University of Utah record for annual fund pledges, topping the previous record set by the medical school for \$80,000 by 123%.
- Achieved the third largest year in gifts from corporate and foundation in the program's history with \$245,749 in gifts.
- Broke the Undergraduate Advancement's prior record for number of unique gifts by 49% with 1,263 unique gifts to office affiliated accounts.
- Filed 126 contact reports demonstrating new and deepened relationships between the community and the University. Comparable one person development offices (Marriott Library, College of Social Work, College of Education) filed from 43 to 76 contact reports.
- Raised \$110 for every non-salaried dollar spent.
- Deepened engagement and participation among members of the Board of Advisors for Undergraduate Advancement:
 - Mentoring Committee: In its fourth year, the mentoring effort nearly tripled the number of participating mentors to 32 mentors.
 - Internship Committee: Successfully launched its first Internship Networking event with over 25 companies being represented and over 120 students in attendance. Nearly 20 internships placements were made.
 - Successfully met a \$10,000 donor challenge to provide funds for the BlockU Book Award program to provide 40 book awards for the 2013/14 academic year.
- Planned and executed the successful 500 plus guest Student Life Center Ground Breaking Celebration event. The event had significant representation from the student community with as many as 200 students in attendance.

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UNDERGRADUATE ADVANCEMENT CAMPAIGNS

After launching the Student Life Center campaign in fall of 2007, this year we concluded it with a groundbreaking celebration in April. Over 500 attendees participated with a very strong representation from students.

Student Life Center Campaign—\$7,500,000

Since inception of the silent phase of the Student Life Center campaign in 2007 the critical element to the campaign has been to secure a lead gift. In January of 2008 the Student Life Center campaign team submitted a lead gift proposal to the George S. and Dolores Doré Eccles Foundation for \$7.5M (when the original goal was \$15M). In spring of 2013 we learned that the Foundation agreed to a \$3M lead gift. This gift got us to the finish line and today, as I write this report, the construction crew is laying pipe for the building. The building is projected to open winter/spring 2015.

Sill Center Renovation and Engaged Learning Fund Campaign--\$1,000,000

Undergraduate Studies is currently in the quiet phase of the \$1M Sill Center campaign. The campaign will raise funds for a much needed building renovation as well as provide funds for engaged learning programs such as BlockU, New University Scholars, and UROP and associated scholarships.

The conclusion of the campaign is projected for 2015.

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BOARD OF ADVISORS FOR UNDERGRADUATE ADVANCEMENT

The Board of Advisors for Undergraduate Advancement at the University of Utah was established in the Fall of 2002 to advance the case for excellence in Student Affairs and Academic Affairs, advocate on behalf of higher education, and support the long-term initiatives of Student Affairs and Academic Affairs.

Board members include individuals who have an interest and commitment to undergraduate education and who have achieved a position of respect and/or prominence in the public or private sectors. These individuals represent a wide range of perspectives and experiences with regard to undergraduate education.

Members represent Academic and Student Affairs in the broader community and use their individual and collective influence on behalf of Undergraduate Advancement.

As of July 1, 2013, the Board chair is Curt Dowd (term ends 2015).

Committee chairs are:

- Mentoring—Carl Barton
- Fundraising—Erik Christiansen and John Zarian
- Nominating—Paul Christenson
- Internships—Carol Firmage

Currently there are 27 members.

Year	Unrestricted Gifts	Restricted Gifts	Total Gifts	% change from prior year	Participation Rate
2003/04	\$3,425	\$0	\$3,425	-	-
2004/05	\$5,275	\$18,500	\$23,775	594%	77%
2005/06	\$5,975	\$18,500	\$24,475	7%	72%
2006/07	\$5,325	\$44,500	\$49,825	108%	60%
2007/08	\$3,300	\$38,200	\$41,500	(13%)	52%
2008/09	\$11,075	\$52,700	\$63,775	53%	87%
2009/10	\$14,200	\$145,500	\$159,700	150%	88%
2010/11	\$10,660	\$80,600	\$91,260	(43%)	99%
2011/12	\$19,500	\$65,975	\$183,020	100%	100%
2012/13	\$11,854	\$104,459	\$125,813	(31%)	81%

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ANNUAL GIVING

Parent Fund

New this year, the Office of Undergraduate Research partnered with the Annual Fund to launch a Parent Fund appeal that included a three year pledge. Gifts received are reflected below and a new column has been added to reflect combined gifts and pledges received.

With support from the Parent Fund, Student & Academic Affairs awarded \$26,000 to Student Affairs and Undergraduate Studies-related programs.

Parent Fund	Gifts	Percent Change	Gifts and Pledges
2002/03	\$2,780	-	
2003/04	\$1,440	(48%)	
2004/05	\$3,115	116%	
2005/06	\$3,800	22%	
2006/07	\$3,970	4%	
2007/08	\$5,250	32%	
2008/09	\$3,475	(33%)	
2009/10	\$28,690	725%	
2010/11	\$19,188	(33%)	
2011/12	\$39,981	108%	
2012/13	\$43,956	10%	\$179,783

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Corporate and Foundation Support

Please see appendix for a list of foundations to which Office for Undergraduate Advancement submitted proposals.

Year	Total Requested	Total Awarded	Percent Change	Total Accepted	Total Submitted	Acceptance Rate
2002/03	--	\$3,500		--	--	--
2003/04	--	\$26,000	642%	--	--	--
2004/05	--	\$61,000	134%	--	--	--
2005/06	--	\$230,900	278%	--	--	--
2006/07	--	\$121,000	-47%	--	--	--
2007/08	--	\$354,423	193%	--	--	--
2008/09	--	\$546,218	54%	--	--	--
2009/10	\$3,044,700	\$39,200	-92%	3	22	14%
2010/11	\$342,230	\$68,000	73%	4	23	17%
2011/12	\$947,800	\$65,800	-3%	6	22	27%
2012/13	\$544,449	\$245,749	273%	14	45	31%

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Scholarships

Below is an overview of the scholarships and endowments for which Undergraduate Advancement provides management and stewardship. It is this Office's goal to reduce as much as possible the number of scholarship managed by partnering with the Office of Financial Aid for their administrative support.

Bachelors of University Studies Scholarships—Ren T. Rice Scholarship

The Ren T. Rice Scholarship was founded in 2004-05 by Ren T. Rice to be awarded to a student who may have been struggling to find a major program and is using the B.U.S. degree to pursue his/her academic and career goals.

Board of Advisors for Undergraduate Advancement Scholarship

The Board awards a varying amount of funds to a variety of areas, depending on available funds and committee preferences.

Ghulam-Lauri Scholarship

The Ghulam-Lauri Scholarship, established in 2007 by Mr. and Mrs. Patel, awards annual scholarships with a preference for students from the Muslim faith.

Ibarra Scholarship

The Hispanic Chamber of Commerce Ibarra Scholarship was created in Fall 2006 to award a \$10,000 scholarship—two to be paid out at \$2,500 a year over four years. Robert Rendon is the contact person for this scholarship administered by Office for Undergraduate Advancement.

John and Irene Francis Endowed Scholarship

For a three year trial period the funds from this endowment will go to create a UROP assistantship. With sufficient stewardship from UROP, the funds will permanently stay with the program.

June Mason Konrad Endowed Scholarship

The June Mason Konrad scholarship was a planned gift that came to Office for Undergraduate Advancement in 2007. Paul Christenson, Board of Advisors for Undergraduate Advancement member, is the primary contact for this gift. Ms. Konrad was his aunt. The scholarship is need-based and has a preference for a student with who attended high school in Box Elder county.

Kennecott Scholarship

Kennecott established a scholarship with the University of Utah in 1991 to recognize outstanding scholarship in undergraduate disciplines from throughout campus.

Laurie Jess Endowed Scholarship Fund

The Laurie Jess Endowed Scholarship Fund is to be established through the proceeds of a planned gift. The scholarship is for undergraduate students with a preference for minority students. Effective once the proceeds are transferred to the University, date unknown.

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LEAP

LEAP gifts for scholarships are numerous, vary from year to year and come from a variety of donors.

Oasis of Hope

The scholarship was designated for an outstanding student with financial need who is involved in community service.

Olene S. Walker Transition to Adult Living Scholarship

The scholarship is designed to assist qualified youth who are transitioning out of state foster care to complete a post-secondary education program (degree or certificate) at one of the Utah System of Higher Education institutions. The scholarship is sponsored by the Utah Educational Savings Plan with assistance from private donors.

Parent Fund

The Parent Fund awards a varying amount of funds to a variety of areas, depending on availability of funds and need.

Roger Leland Goudie Scholarship

The *Goudie Scholarship* offers a varying amount for matching funds for new scholarships for undergraduate minority students attending the University of Utah.

Salt Lake CAP Head Start Scholarship

The *Salt Lake CAP Head Start Scholarship Fund* provides one two year \$6,000 scholarship to a student who has participated in a Salt Lake or Tooele County Salt Lake Head Start Program as a child. The Scholarship also includes a \$3,000 housing stipend for the first year of the scholarship award.

Travis Rigby Endowed Scholarship for the Utah Daily Chronicle

This scholarship was established in 2007 by Travis Rigby for students on the news team of the Daily Utah Chronicle. Preference is for a student from Logan High School in Logan, Utah.

U Futures

U Futures is a Board of Trustees inspired scholarship that incentivizes average students in their final year at the U to complete their studies with scholarship awards ranging from \$500 to \$3,000.

UROP

UROP Assistantships come from a variety of sources and donors.

Zahir Scholarship

The Zahir Scholarship is available to an undergraduate student who has demonstrated experience with or commitment to serving or working with the Muslim community and currently attends the University of Utah or plans to enroll full-time.

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Year	Total Gifts	Percent Change
2003/04	\$26,500	--
2004/05	\$55,000	107%
2005/06	\$540,975	883% (Eccles \$222K)
2006/07	\$686,753	26% (Eccles \$425K)
2007/08	\$473,048	57% (Cooke Foundation \$270K)
2008/09	\$673,409	42% (Eccles \$503,840)
2009/10	\$279,500	(58%)
2010/11	\$355,500	27%
2011/12	\$283,382	(20%)
2012/13	\$326,967	15%

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UNDERGRADUATE STUDIES PROGRAMS**LEAP**

Undergraduate Advancement distinguishes the LEAP program to prospective scholarship donors as a way to promote student retention and graduation by providing both academic and need-based scholarships for continuing LEAP students.

Year	Total Gifts	Percent Change
2007/08	\$10,408	--
2008/09	\$23,408	124%
2009/10	\$58,700	151%
2010/11	\$63,600	8%
2011/12	\$61,100	-4%
2012/13	\$61,100	0%

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UROP

The Undergraduate Research Opportunity Program (UROP) provides undergraduate students the opportunity to work with faculty on research and creative projects. UROP provides assistantships to selected students and showcases the students' work at the annual Undergraduate Research Symposium.

Year	Total Gifts	Percent Change
2005/06	\$13,650	--
2006/07	\$9,395	(31%)
2007/08	\$21,000	123%
2008/09	\$41,000	95%
2009/10	\$21,000	(51%)
2010/11	\$220,750	951%
2011/12	\$17,750	(92%)
2012/13	\$13,550	(24%)

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UNDERGRADUATE ADVANCEMENT SCHOLAR SUPPORT PROGRAM

In the 2008/09 academic year, as part of an effort to more fully support Undergraduate Advancement scholarship recipients in their success at the U, we introduced the Office for Undergraduate Advancement Student Support Program. The program introduces students to key programs and classes that we know significantly impact students' level of success, satisfaction and retention.

Specifically, the Program offers all scholarship recipients the opportunity to participate in LEAP, Psych 2600, CESA Equity and Diversity course, or, if eligible, Honors College. We actively support students in getting the information they need to make smart choices about which program will be best for them.

In the spring, for students who are underperforming academically, we partner with University College to offer three workshops designed to help these students get back on track.

In order to align student recipients with the Program and to clarify expectations of recipients, we have introduced a thorough acceptance letter that must be signed and returned to the Office for Undergraduate Advancement office prior to the release of their scholarship funds. A critical part of this process includes the expectation that students submit a thank you letter with their award acceptance letter. The letter is forwarded to the donor.

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UNDERGRADUATE ADVANCEMENT METRICS

Below are metrics which may be used to help identify the strengths and opportunities for Undergraduate Advancement.

Number of Contact Reports Filed

Below is an account of the number of contact reports filed for Office for Undergraduate Advancement. Contact reports are filed when there is a significant contact such as an ask, cultivation toward a specific goal, or an initial approach to a prospect.

Contact reports are NOT filed for routine contact that may occur when an individual is serving in a volunteer capacity on a board or campaign unless the contact is significant as described above.

Year	Contact Reports Filed	Percent Change
2007/08	47	--
2008/09	117	148%
2009/10	81	(31%)
2010/11	98	21%
2011/12	110	12%
2012/13	126	15%

Number of Undergraduate Advancement Coordinated Events

Events below include the Board of Advisors for Undergraduate Advancement meetings, Kennecott awards banquet and John Francis farewell reception.

Year	Events	Attendance Low	Attendance High
2008/09	12	25	100
2009/10	8	10	100
2010/11	6	15	75
2011/12	10	10	100
2012/13	12	10	500+

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Number of Gifts Received

This metric is a count of the number of gifts received through the accounts managed directly by the Undergraduate Advancement and includes gifts from the parent appeal, Board of Advisors for Undergraduate Advancement members, and scholarship donors.

Year	Total Gifts	Percent Change
2008/09	149	--
2009/10	617	314%
2010/11	395	(36%)
2011/12	844	113%
2012/13	1,263	49%

Income

This table reflects the total gifts and pledges to the Office for Undergraduate Advancement.

Entity	2010/11 Gifts & Pledges
Board of Advisors for Undergraduate Advancement	\$116,313
Parent Appeal	\$179,783
Scholarship Gifts	\$326,967
Student Life Center Campaign	\$1,945,000
2012/13 Funding	\$2,568,063

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Office for Undergraduate Advancement Giving History

Year	Income	Percent Change
2002/03	\$6,280	--
2003/04	\$67,039	967%
2004/05	\$106,049	58%
2005/06	\$759,271	616%
2006/07	\$775,595	2%
2007/08	\$870,919	12%
2008/09	\$765,892	(12%)
2009/10	\$773,090	.9%
2010/11	\$1,970,298	155%
2011/12	\$1,991,088	1%
2012/13	\$2,568,063	28%

Expenses

Undergraduate Advancement expenses 2012/13:

Year	Expenditure	Percent Change	Dollars Raised/Dollars Spent
2002/03	\$5,486	--	\$1
2003/04	\$4,955	-10%	\$14
2004/05	\$4,110	-17%	\$26
2005/06	\$6,915	68%	\$110
2006/07	\$3,589	-48%	\$216
2007/08	\$8,795	145%	\$99
2008/09	\$14,674	67%	\$52
2009/10	\$17,611	20%	\$44
2010/11	\$18,783	7%	\$105
2011/12	\$23,802	27%	\$84
2012/13	\$23,435	-2%	\$110

See appendix for an itemized accounting of expenses.

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2013/14 UNDERGRADUATE ADVANCEMENT GOALSCampaign

\$1 Million Sill Center Renovation and Engaged Learning Fund Campaign

- Outreach to prospects
- Secure lead gift
- Hold campaign kick-off event in spring 2014

Board

Board of Advisors for Undergraduate Advancement

- 100% participation in annual gift appeal
- All members actively engaged in a committee or on campus
- Clear, measurable committee goals
 - Internships
 - Fundraising
 - Mentoring
 - Nominating
 - Women's Initiative (with Martha Bradley)

Annual Support

Parent Fund

- Personal thank you from Barb and Martha to all \$100+ Parent Fund donors.
- Place an ad in the Continuum promoting the Parent Fund in cooperation with Central Development.
- Develop scalable fundraising strategy in consultation with Marts & Lundy.

Foundations

- Cultivate existing relationships through outreach, engagement and reports on how funds were used
- Grow three to five new relationships through well-matched proposals

Scholarships

- Steward scholarship donors through outreach, engagement, and annual reports
- Hold third annual Undergraduate Advancement scholarship luncheon with donors and recipients
- Work with the Office of Financial Aid to transfer scholarship awards and administration there.

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APPENDIX**Student Affairs/Undergraduate Studies Areas**

Admissions—Matt Lopez
Bennion Center—Linda Dunn
Bachelor of University Studies—Edward Barbanell
BlockU and New U Student Experience—Ann Darling
Campus Dining Services—Reggie Conerly
Campus Recreation—Mary Bohlig
Career Services—Stan Inman
Center for Teaching and Learning Excellence—Patrick Tripeny
Child Care Center—Shauna Lower
Continuing Education—Sandi Pershing
Counseling Center—Lauren Weitzman
Dean of Students Office—Annie Christenson
Disability Services—Scott McAward
Financial Aid—John Curl
Honors College—Sylvia Torti
Housing and Residential Education—Barb Remsburg
International Education—Mark Bean
International Center—Sabina Klahr
LEAP—Carolyn Bliss
LBGT Resource Center—Kai Martinez
MUSE—Mark Matheson
Orientation—Kathryn Kay
Outreach and Engagement—Sandi Pershing
Registrar—Tim Ebner
Student Health Center—Mark Pfitzner
Student Involvement—Lori McDonald
Student Success Initiative—Amy Bergerson
Student Union—Whit Hollis
TACC—Cory Stokes
TRIO/Educational Opportunities Program—Kyle Ethelbah
Undergraduate Advancement—Erica Marken
University College—Sharon Aiken-Wisniewski
UROB—Steve Roens
Veterans Support Center—Roger Perkins
Women's Resource Center—Deb Daniels