

September 2025 Advancement Committee






Schedule

Wednesday, September 3, 2025 8:45 AM — 9:00 AM CDT

Organizer

Colton Cockrum

Agenda

1. Call to Order and Opening Remarks	1
Presented by Robert Carter	
2. Roll Call and Declaration of Quorum	2
For Approval - Presented by Colton Cockrum	
3. Approval of Advancement Committee Meeting Minutes from March 5, 2025	3
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Presented by Robert Carter	
6. Adjournment	40
Presented by Robert Carter	

1. Call to Order and Opening Remarks

Presented by Robert Carter

2. Roll Call and Declaration of Quorum

For Approval

Presented by Colton Cockrum

3. Approval of Advancement Committee Meeting Minutes from March 5, 2025

For Approval

Presented by Robert Carter

**University of Memphis Board of Trustees
Advancement Committee Meeting
March 5, 2025**

Meeting Minutes

Agenda Item 1: Call to Order and Opening Remarks

Trustee Carter called the meeting to order and welcomed everyone to the Advancement Committee meeting.

Agenda Item 2: Roll Call and Declaration of Quorum

Trustee Carter requested a roll call. Secretary Cockrum called the roll. Trustees Edwards, Carter, and McKinney were in attendance in-person. Trustee North was in attendance virtually. He stated he was alone and could hear. Other trustees were in attendance and Secretary Cockrum recognized those trustees. Those trustees included Trustees Springfield, Marchetta, Khokhar, as well as Chairman Johnson. Trustee Roberts was in attendance virtually. She stated she was alone and could hear. Secretary Cockrum declared a quorum.

Agenda Item 3: Approval of Advancement Meeting Minutes from September 4, 2024

Trustee Carter called for a motion and a second to approve the meeting minutes from September 4, 2024. Trustee North provided the motion and a second was provided by Trustee Edwards. There was no discussion on the meeting minutes. Secretary Cockrum called a roll call vote, and the meeting minutes were approved.

Agenda Item 4: Advancement Update

Trustee Carter recognized Dr. Tara Jones, Senior Vice President for Advancement and UM Foundation. Dr. Jones stated that she did a reorganization of Advancement creating three divisions: Engagement, Philanthropy, and Foundation. Said that ½ of Advancement donor are alumni and ½ are non-alumni so that she wanted to cast a wide net and engage with donors regardless of alumni status. Looking at fundraising progress a goal of \$45M was set for FY25, and as of March 5 they have raised \$37.4M, which is 83% of goal with 67% of the FY elapsed. There were 7 gifts at the \$1M and above level. She hit on FY25 highlights which included a \$4.99M commitment from Mellon Foundation, and a UofM record of raising over \$30M on Giving Tuesday which doubled both donor and gift counts. Looking ahead to 2025 calendar year among their goals is establishing four national networks in other cities with regular events/engagement, to relaunch and elevate the Student Ambassador Board, to launch the first college-level segmented annual giving campaign in 10 years, and to strengthen the collaboration and partnership between Athletics and academics for strategic donor engagement as well as co-hosted events and system integration. Dr. Jones then opened the floor to questions, which there were none.

Agenda Item 5: Additional Business

Trustee Carter remarked that he can feel the momentum in Advancement, and that it will manifest itself with great new projects on campus and great new athletic projects. He said that the hallmark is that 50% of the giving comes from non-alumni. Trustee Carter asked for additional business and there was none.

Agenda Item 6: Adjournment

Trustee Carter called for a motion and second for adjournment. A motion and second was properly made and the meeting was adjourned.

4. Advancement Update

Presentation

Presented by Robert Carter and Tara Jones

Advancement Update

Advancement Committee

Dr. Tara Jones
Senior Vice President for Advancement

September 3, 2025
University Center



**Board of
Trustees**

Advancement KPIs

	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025
New Gifts & Commitments	\$33,715,000	\$36,726,000	\$51,851,236	\$36,246,964	\$37,261,170	\$64,899,090
Alumni Donor Count	5,273	6,024	5,869	4,920	4,438	4,246
Total Donor Count	8,234	9,041	10,786	9,641	9,208	8,716

FY25 | By the Numbers

FY25 Total Raised*



Percentage of Goal Raised

144%

**as of 7.18.25*

FY25 | By the Numbers

Record setting year for
overall fundraising:
\$64.9M

Record setting year
for academics:
\$33M

Record setting year
for athletics:
\$32M

Record amount
committed for
academic facilities:
\$14M

Most dollars raised for
current use scholarships
and fellowships
\$5M

Record setting year for
incoming revenue:
\$46M

\$50K+ Commitments

FY23
Major Gifts Result:

109

\$1M+ Gifts:

5

FY24
Major Gifts Result:

110

\$1M+ Gifts:

6

FY25
Major Gifts Result:

135

\$1M+ Gifts:

11

FY25 Goal: 100

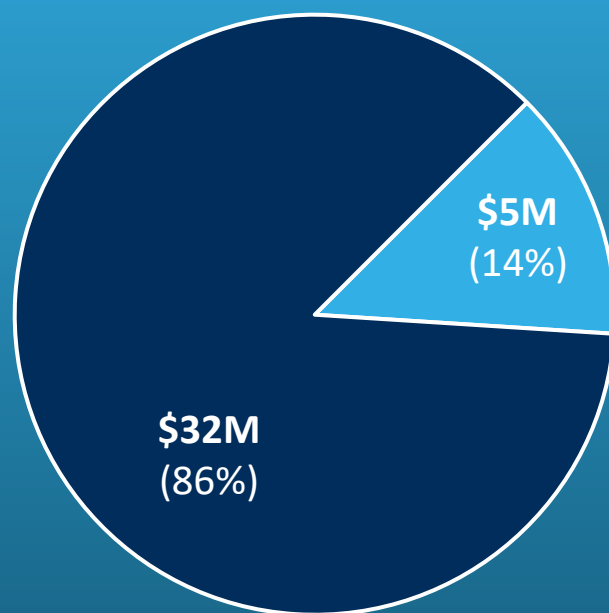


FY Comparisons

Strategic Category	FY23	FY24	FY25
Academic Facilities	\$ 885,035	\$ 1,330,373	\$ 14,281,943
Annual Scholarships / Fellowships	\$ 2,052,545	\$ 2,137,451	\$ 5,116,080
Annual Programmatic Support	\$ 6,810,760	\$ 5,089,383	\$ 10,032,829
Athletics	\$ 11,454,890	\$ 23,475,944	\$ 33,070,513
Endowed Scholarships / Fellowships	\$ 4,424,031	\$ 4,743,495	\$ 2,949,539
Endowed Funds for Excellence	\$ 1,444,933	\$ 391,880	\$ 977,501
Faculty Support	\$ 8,853,436	\$ 208,596	\$ 366,899

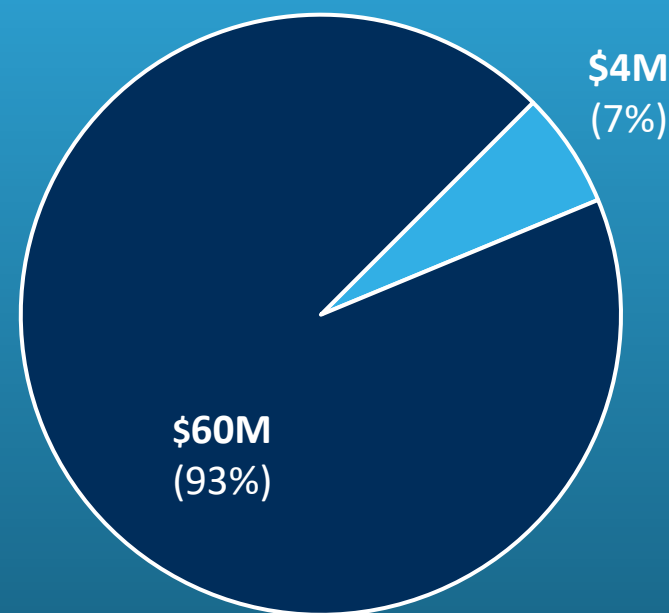
New Gifts & Commitments

FY24 Gifts and Commitments
Endowment vs. Current Use



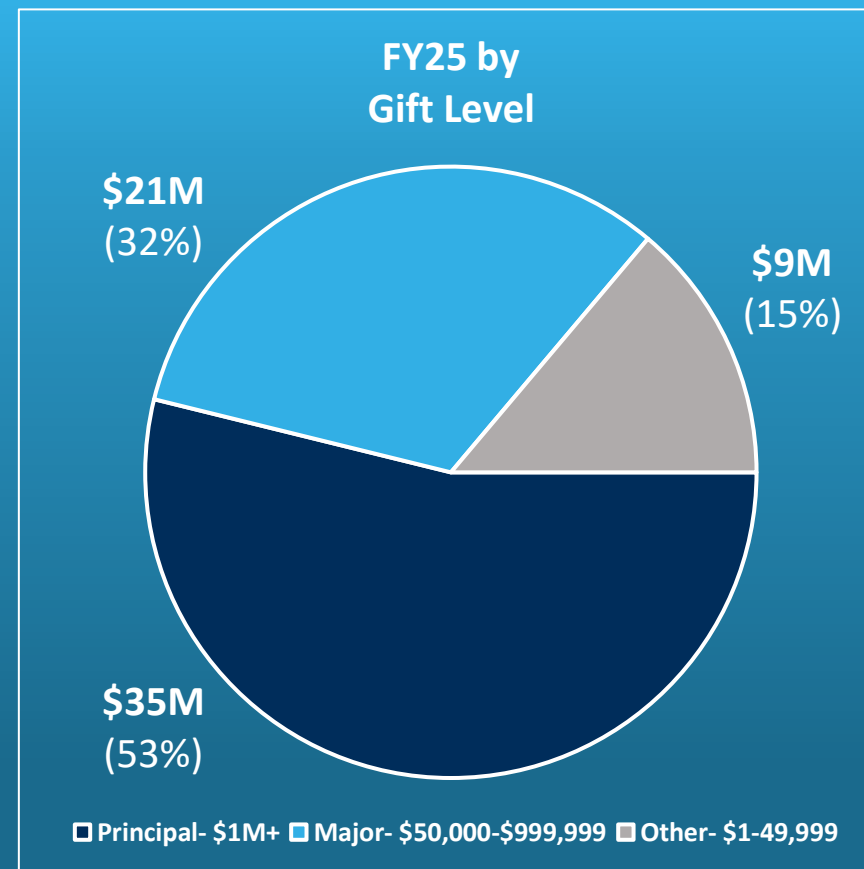
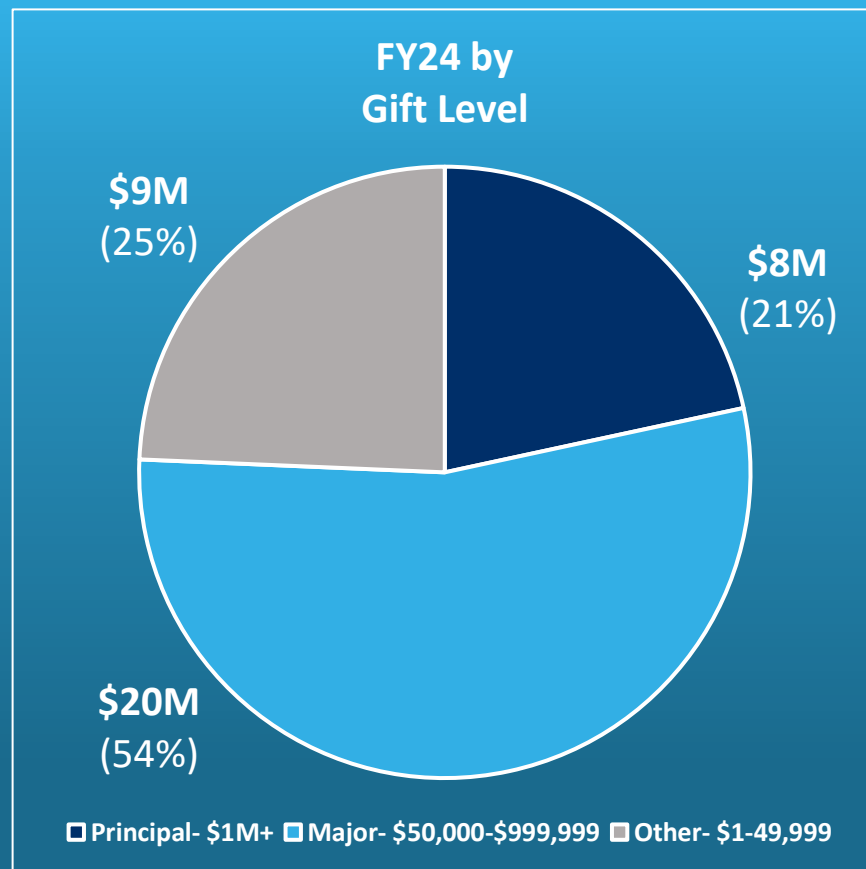
Endowment Current Use

FY25 Gifts and Commitments
Endowment vs. Current Use



Endowment Current Use

Gift Level Comparison



Endowment Gifts

Incoming Revenue

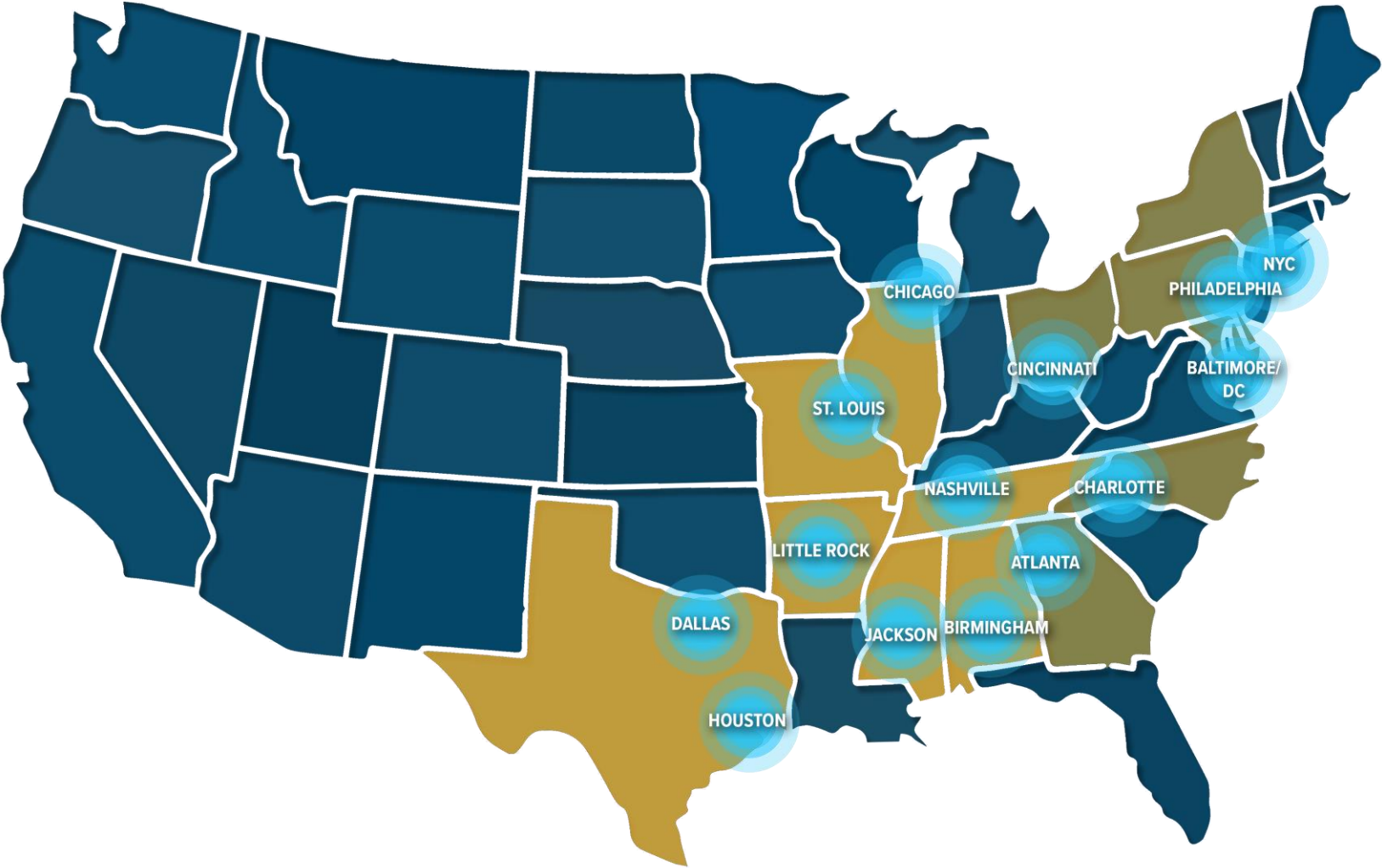
FY20	\$3.3 m
FY21	\$7.3 m
FY22	\$9.0 m
FY23	\$14.3 m
FY24	\$6.9 m
FY25	\$5.9 m



Campaign Designations

Strategic Category	Campaign Amount
Academic Facilities	\$23,296,610
Annual Programmatic Support	\$64,299,426
Annual Scholarships / Fellowships	\$17,774,721
Athletics	\$121,922,031
Endowed Funds for Excellence	\$19,006,408
Endowed Scholarships / Fellowships	\$29,193,501
Faculty Support	\$15,929,984
Total	\$ 291,422,681

Admissions & Recruitment Focus



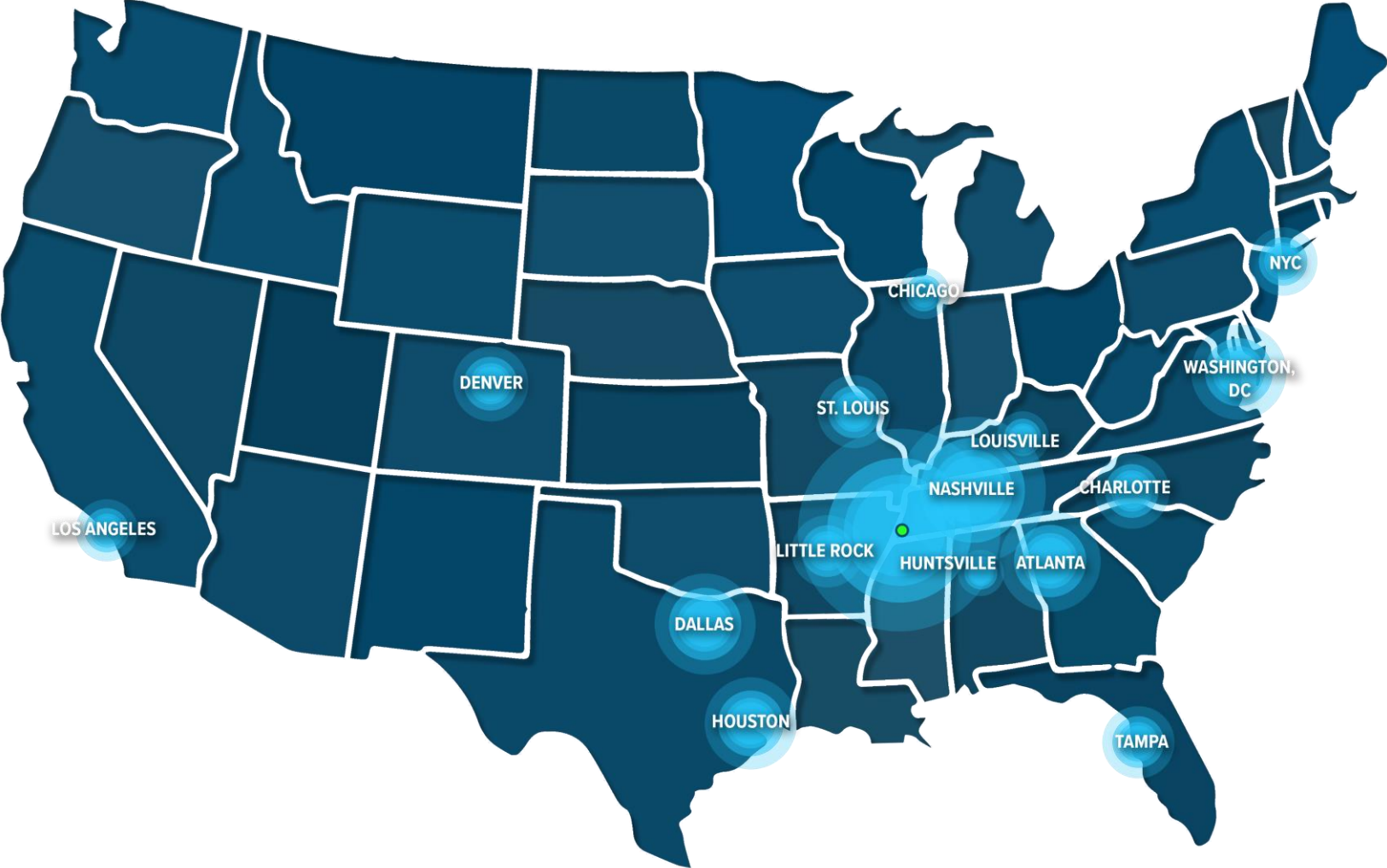
Target Recruitment States/Cities
Atlanta, GA
Baltimore, MD + DC
Birmingham, AL
Charlotte, MC
Chicago, IL
Cincinnati, OH
Dallas, TX
Houston, TX
Jackson, MS
Little Rock, AR
Nashville, TN
New York, NY
Philadelphia, PA
St. Louis, MO

Alumni Distribution



City/ Metro Area	Alumni
Memphis Metro	77,132
Nashville	3,439
Atlanta Metro	1,354
Dallas Metro	1,174
Little Rock Metro	806
Houston Metro	755
Washington, DC Metro	554
St. Louis Metro	548
Chicago Metro	433
Charlotte Metro	417
Denver Metro	388
New York Metro	305
Los Angeles Metro	271
Tampa Metro Area	342
Huntsville	242
Louisville, KY	232

Prospects Rated \$50K+



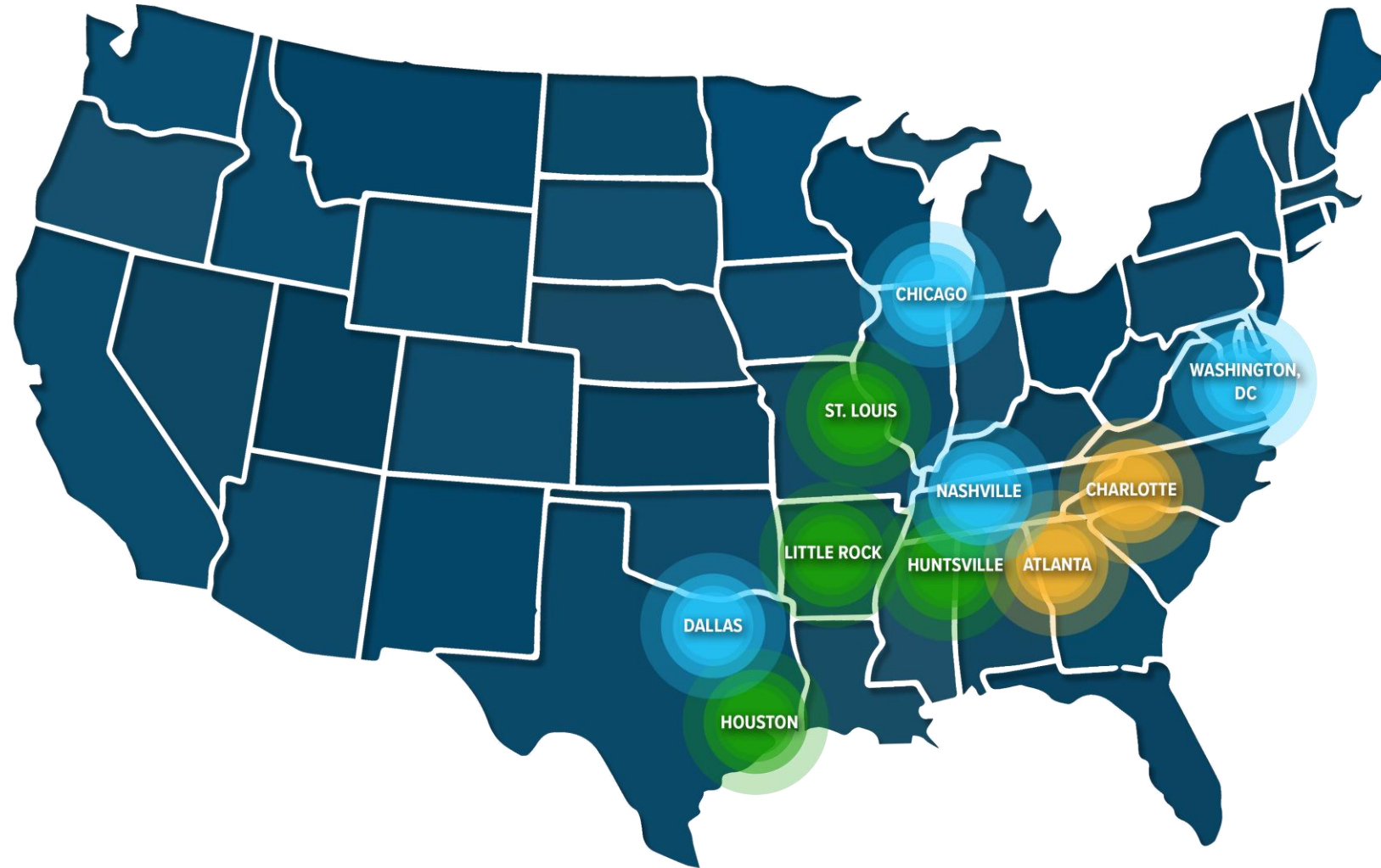
City/ Metro Area	Alumni
Memphis Metro	4,595
Nashville	816
Atlanta Metro	266
Washington, DC Metro	196
Dallas Metro	184
Houston Metro	140
Los Angeles	139
New York	113
St. Louis	71
Charlotte Metro	67
Denver, CO	61
Little Rock Metro	57
Tampa Metro	51
Chicago Metro	39
Huntsville	29
Louisville, KY	26

American Conference



AAC Teams
Charlotte 49ers
East Carolina Pirates
Florida Atlantic Owls
Memphis Tigers
North Texas Mean Green
Rice Owls
South Florida Bulls
Temple Owls
Tulane Green Wave
Tulsa Golden Hurricane
UAB Blazers
UTSA Roadrunners
Wichita State Shockers

National Advancement Target Areas



Out of Town Networks

CY25 - Chicago, IL

CY25 - Dallas, TX

CY25 - District of Colombia

CY25 - Nashville, TN

CY26 - Atlanta, GA

CY26 - Charlotte, NC

CY27 - Little Rock, AR

CY27 - Houston, TX

CY27 - Huntsville, AL

CY27 - St. Louis, MO

Focused Messaging

We invite you to....

**Recruit
students**

**Philanthropically
invest**

**Hire our students
and alumni**

**Support
Athletics**

...FOR A SUCCESSFUL OUTCOME FOR EVERY STUDENT.

The University of Memphis Board of Trustees

Presentation

Date: September 3, 2025

Committee: Advancement Committee

Presentation: Advancement Update

Presented by: Dr. Tara Jones, Senior Vice President of Advancement

Background: Dr. Jones will provide an advancement update that will include information regarding key performance indicators related to the Ascend Strategic Plan, FY25 fundraising results, FY26 Advancement plans, and campaign update.

University of Memphis Advancement
Enhancing Philanthropy and Engagement for a Brighter Future
Strategic Plan 2025 – 2028

In today's rapidly evolving educational landscape, institutions of higher learning face both unprecedented challenges and remarkable opportunities. The University of Memphis is committed to harnessing these opportunities through a focused and strategic approach to university advancement. Our goal is to strengthen our philanthropic efforts and enhance engagement with our alumni, donors, and community stakeholders to foster a culture of giving that supports our mission, vision, and values.

As a cornerstone of the Memphis community and a leading institution in higher education, the University of Memphis recognizes the vital role of philanthropy in shaping the future of our academic programs, research initiatives, and student support services. By building robust partnerships and fostering meaningful relationships, we aim to create an environment where generosity flourishes and where every gift has a lasting impact on the lives of our students and the communities we serve.

This strategic plan outlines our commitment to:

1. **Enhancing Engagement Opportunities:** We recognize that meaningful engagement extends beyond financial contributions. We aim to create an inclusive framework for alumni involvement, volunteerism, mentorship, career services, and networking opportunities that connect our university community to the vibrant life of the institution.
 - **Strengthening Alumni Relations:** Our alumni are among our most valuable assets. We will enhance our opportunities to keep alumni connected to their alma mater, fostering a sense of belonging and encouraging their active participation in university life.
 - **Leveraging Community Partnerships:** The University of Memphis is dedicated to building strategic partnerships with non-alumni individuals, corporations, local businesses, and other organizations. By collaborating with these entities, we can amplify our impact, drive innovation, and address pressing societal challenges.
2. **Fostering a Donor-Centered Culture of Philanthropy:** We will implement initiatives that promote awareness of the importance of philanthropic support and encourage contributions across a diverse range of giving levels, reflecting the values and priorities of our university community.
3. **Measuring Impact and Success:** To ensure accountability and continuous improvement, we will implement systems to track and evaluate the outcomes of our advancement initiatives, demonstrating the tangible benefits of philanthropy and engagement.

We invite all members of the University of Memphis community to join us on this journey, to invest in the future of our students and our institution, and to be a part of something greater. Let us work

together to elevate the University of Memphis to new heights through collaboration, commitment, and philanthropy.

Vision

To become a nationally recognized, forward-thinking Advancement organization dedicated to fostering engagement and philanthropic partnerships that align with and support the University's goals

Mission

The Advancement team cultivates meaningful connections and investment opportunities for the community, alumni, friends and students and enhances support for the University of Memphis.

Values

Each Advancement team member thoughtfully contributed to creating our shared values. Our Values are the traits and qualities that represent University Advancement's driving forces:

Integrity - Honesty, morality and a commitment to upholding professional standards.

We commit to acting transparently and responsibly to promote trust within the Advancement Organization.

Collaboration - The importance of working together across teams and departments to achieve common goals.

We value pooling diverse skills, perspectives, and ideas to enhance creativity and productivity. We actively foster a sense of community and shared purpose that leads to improved outcomes and prompt responses to challenges.

Accountability - Taking responsibility for one's actions, decisions, and outcomes.

We encourage individuals and teams to own their tasks and deliver on expectations to enhance Advancement's internal and external credibility.

Respect - Recognizing the inherent worth of all individuals within our community.

We cultivate an inclusive environment of mutual support where diverse perspectives and strengths are valued, leading to a positive culture that drives engagement.

Excellent communication - Clear and effective exchanges of information at all levels.

Excellent Communication involves actively listening, providing constructive feedback and enhancing teamwork that empowers quick problem-solving and decision-making.

Advancement Goals to Support the University's Ascend Goals 1, 2, 3

1. Raise \$63M for Student Scholarship and Fellowships

- **\$25M** new current use/annual scholarships and fellowships and **\$38M** new endowed scholarships and fellowships. This includes Merit, Financial Need, Completion, Innovative School District /University Schools, Transfer, Graduate.

2. Raise \$92M for Programmatic Support

- **\$70M** in Annual Programmatic and **\$22M** in Endowed Funds for Excellence. Includes - Internships, Student Emergency Fund, Study Abroad, First Generation Office, Undergraduate Research, Research, College Priority Funds.

University Goal 1

Aggressively Provide Access

Increase opportunities for student access through philanthropic support:

- Higher Enrollment and Admissions Standards
 - Merit-Based Undergraduate Scholarships – To recruit outstanding students and reward academic excellence, University Advancement will create new merit-based scholarships. These scholarships are designed to recognize and support students who demonstrate outstanding academic performance, leadership qualities, and extracurricular involvement. By providing these new awards, the University encourages high-achieving students to pursue their education with reduced financial burden.
- Improve Access and Affordability
 - Need-Based Undergraduate Scholarships – Understanding that financial barriers can impede access to higher education, the University of Memphis and University Advancement will create new need-based scholarships. These scholarships will help to ensure that deserving individuals can attend and succeed at the University.
 - Scholarships focused on transfer and non-traditional students
- Grow Graduate and Professional Enrollment
 - Graduate Fellowships provide financial support to advanced degree candidates. These fellowships not only help cover tuition and living expenses but also often include opportunities for teaching, research, and professional development. By investing in graduate education, the University seeks to nurture the next generation of leaders and scholars.
- Academic support programs such as the First-Generation Office, Frosh Camp, First Year Experience, etc.

University Goal 2

Create Opportunities to Succeed

Improve the student experience through philanthropic investments:

- Student Success 2.0

- Undergraduate “Completion” Scholarships - These scholarships are typically aimed at students who are close to completing their degrees. They can provide necessary financial support to help cover tuition, fees, and other expenses that may be a barrier to graduation.
- Student Emergency Funds – These funds assist students with unexpected expenses, such as medical emergencies, housing instability, or other financial crises that could impact their education. Students usually need to apply for these funds and may be required to provide documentation of their situation.

University Goal 3

Outcome-Focused Academics

- High Impact Practices are evidence-based educational practices that enhance student learning, engagement, and retention. Engaging **undergraduates in research** not only enhances their understanding of their academic field but also helps develop critical skills like analytical thinking and creativity. **Internships** provide students with practical, hands-on experience in a work setting relevant to their field of study. **Studying abroad** allows students to gain global perspectives that enrich their academic experience. Endowed funds for excellence provide for these types of student enrichment opportunities.
- Educational Ecosystem - The University Schools can provide a unique opportunity as a student feeder program for The University of Memphis. The University Schools are the tuition free public schools located at the University of Memphis. In 2024, University Schools was authorized to become a local education agency as the state’s first Innovative School District. The University Schools serve over 1,300 students from six weeks through 11th grade (growing to 12th grade by the 2025-26 school year).

Advancement Goals to Support the University’s Ascend Goals 4, 5

3. Raise \$20M for Faculty and Research Support

- a. **\$4M** new current use/annual faculty and research support and **\$16M** in endowed faculty support. This includes professorships and chairs.

4. Raise \$38M for Academic Facilities

- a. New and renovated academic facilities projects such as the Fogelman College Building Modernization Project, the Edwards Research and Innovation Center (ERIC), and the Scheidt Family Performing Arts Center enhance the student experience.

University Goal 4

Strengthen Research Enterprise

- Increase and Enhance Research Capacity
 - Create new Endowed Professorships and Chairs
 - Improve and Expand Research Infrastructure and Purposeful and Impactful Research and Institutes
 - Purposeful and impactful research is characterized by its focus on addressing real-world problems and contributing positively to society.

Research institutes that embody these principles often prioritize collaboration, interdisciplinary approaches, and a commitment to translating findings into practical applications.

- University Advancement will work with the President and Provost to identify those institutes which may have donor-funded opportunities

Advancement Goals Supporting – University Goal 5 Recruit, Retain, Reward, and Recognize Our People

- Recruiting and Onboarding
 - New Advancement Employees
 - Create a coordinated onboarding plan for all new Advancement employees
 - Volunteers
 - Create a coordinated onboarding plan for all Advancement volunteers – University of Memphis Foundation Board, National Alumni Board, Alumni Chapter Leaders, Dean’s Advisory Boards with Fundraising Priorities.
- Professional Development
 - Maximize EAB membership
 - Maximize CASE membership
 - Maximize EverTrue partnership
 - Joint training sessions to include deans
 - Other
- Advancement and Leadership
 - Expand coaching and training for managers
 - Develop promotion guidelines
- Recognition
 - Participate at a high level and nominate for the University Staff Excellence Awards
 - Create monthly recognition program, Top Tigers, that underscores the Advancement value words
- Rewards
 - Review bonus structure
 - Explore retention bonus opportunities in association with performance metrics
- Retention
 - Formally celebrate employment milestones
 - Undertake position and salary review for all Advancement team

Advancement Goals Supporting – University Goal 6 Exemplify Operational Excellence

- Process Excellence and Capabilities
 - In collaboration with appropriate groups such as Advancement leadership, UMF, General Counsel, etc., review and update policies, procedures, and bylaws such as:

- Naming and Recognition Policy
- Coordination of Fundraising Activity Policy
- Gift Acceptance Policy
- Pledge Policy including Pledge Write-off Policy
- Campaign Counting Policy
- Donor Data Acquisition and Use Policy
- Whistleblower Policy
- Gift in Kind Policy
- UMAA Bylaws
- MOU/Operating Agreement with UM and UMF
- UMF Bylaws
- IT
 - Review and update gaps in CRM conversion
 - Review data mapping of CRM
 - Create fiscal year, campaign, and on demand reports
 - Integrate and connect all systems with CRM
 - Create and distribute fundraising dashboards for deans and VPs
 - Review all contracts and software commitments to determine operational efficiencies
- Gifts & Records
 - Review and streamline all processes to meet industry standards
- Strengthen partnerships with Athletics, Student Affairs, and Enrollment Management
 - Maximize resources by co-hosting events and programs
- Organization
 - Restructure Advancement organization to maximize opportunities
 - Identify and repurpose positions to best accomplish strategic plan
- Leadership and Culture
 - Align Advancement Pillars with performance plans
 - Integrity
 - Collaboration
 - Accountability
 - Respect
 - Excellent Communication
 - Create a donor-centered philanthropic culture
 - Implement the Memphis BluePrint which provides information, resources, and best practices for how we approach advancement activities at The University of Memphis
 - Provide training and engagement opportunities for Advancement staff, university leadership, deans, and volunteer boards
 - Create donor surveys to ensure we exceed expectations and incorporate feedback into plans
 - Staff Satisfaction (complete university survey and Advancement survey)

- Performance Management
 - Institute annual work plans with measurable goals for each Advancement employee
 - Expand annual performance reviews for coaching and promotions purposes
 - Start six-month review conversations
 - Standardize Fundraising and Alumni/Engagement metrics and goals
- Engagement
 - Review and redefine successful alumni engagement opportunities
 - Assess and (re)start alumni/friends chapters and networks
 - Affinity Chapters
 - Unit-based Chapters
 - Out of Town Networks
 - CY25 Targets – Dallas, D.C., Chicago, Nashville
 - CY26 Targets – Atlanta, Charlotte
 - CY27 – CY28 Targets – Houston, St. Louis, Little Rock, Huntsville
- Marketing and Communications
 - Website
 - Ensure that all Advancement websites are correct and easy to navigate, especially the giving website
 - Investigate persona-based segmentation
 - Explore opportunities for AI engagement officers
 - Establish metrics that grow constituent activation
 - Social Media
 - Create measurable goals
 - Coordinate/align messaging
 - UofM channels
 - Alumni chapter channels

Advancement Goals Supporting – University Goal 7

Generate and Steward Financial Resources

- Engagement Team
 - Engage Alumni and Friends
 - Implement an engagement portal for alumni and friends to easily navigate connection opportunities at the university
 - Provide career services and connection points between our alumni and hiring companies which expands workforce development opportunities
 - Alumni Giving – 2% annual growth goal per industry best practices

FY 24	4,438
FY 25	4,527
FY 26	4,617
FY 27	4,710

- | | | |
|--|-------|-------|
| | FY 28 | 4,804 |
|--|-------|-------|
- Total Donor Count – 2% annual growth goal per industry best practices

	FY 24	9,208
	FY 25	9,392
	FY 26	9,580
	FY 27	9,772
	FY 28	9,967
 - Donor Success
 - Implement Donor Success recognition strategies including stewardship opportunities
 - Expand behavior-based stewardship:
 - New Donors
 - Recurring Donors
 - Endowment Donors
 - Campaign Donors
 - Create new gift agreement templates and restructure approval and routing process in collaboration with all involved teams and departments
 - Review Giving Societies and provide strategies for moving forward
 - Develop a sustainable plan for donor fund usage and reporting in collaboration with all involved teams and departments
 - Philanthropy Team
 - Fiscal Year Fundraising Goals – Estimating new gifts and commitments increase of about 11% year over year
 - FY 24 – \$37M results
 - FY 25 - \$45M
 - 100 new major gift commitments of \$50K+
 - 10% of total from Planned Giving/Estates/Bequests = \$4.5M
 - FY 26 - \$50M
 - 125 new major gift commitments of \$50K+
 - 12% of total from Planned Giving/Estates/Bequests = \$6M
 - FY 27 - \$56M
 - 150 new major gift commitments of \$50K+
 - 15% of total from Planned Giving/Estates/Bequests = \$8.4M
 - FY 28 - \$61M
 - 175 new major gift commitments of \$50K+
 - 20% of total from Planned Giving/Estates/Bequests = \$12.2M

- Comprehensive Campaign Strategies
 - Launch the public phase of the comprehensive fundraising campaign that ignites and engages current and new donors and provides fuel for the university's Ascend strategic plan

Campaign Fundraising Designation Goals

Campaign Goals - Aligned with Ascend Timing			
Designations		Totals	Ascend Goals
Immediate Use/Non-Endowed Academic			
Annual Scholarship/Fellowships (Merit, Financial Need, Completer, ISD/Univ. Schools, Transfer, Graduate)	\$25,000,000		Ascend 1, 2, 3
Annual Programmatic Support (Internships, Student Emergency Fund, Study Abroad, Undergraduate Research, Research, College Priority Funds)	\$70,000,000		Ascend 1, 2, 3
Annual Faculty and Research Support	\$4,000,000		Ascend 4, 5
Academic Facilities (Fogelman, ERIC)	\$38,000,000		Ascend 4
		\$137,000,000	
Endowed Academic			
Endowed Scholarship/Fellowships (Merit, Financial Need, Completer, ISD/Univ. Schools, Transfer, Graduate)	\$38,000,000		Ascend 1, 2, 3
Endowed Chairs and Professorships	\$16,000,000		Ascend 4, 5
Endowed Funds for Excellence (Internships, Student Emergency Fund, Study Abroad, Undergraduate Research, Research, College Priority Funds)	\$22,000,000		Ascend 1, 2, 3
		\$76,000,000	
Athletics (student, programming, facilities) (assuming \$22M each FY26, FY27)	\$200,000,000	\$200,000,000	Ascend 2
Totals	\$413,000,000	\$413,000,000	

- University of Memphis Foundation
 - Increase Endowment Market Value through the UMF investment strategy and new gifts. Assuming 6% growth for UMF and 4% growth for Herff Trust.
 - **The University of Memphis market value endowment number includes: UMF, Herff Trust, philanthropic trusts (currently \$4.8M) endowments (currently \$4M) held at university, and state R1 funds of \$50M+*
 - FY 24 – Actual \$263M
 - FY 25 - \$284M (Goal to add \$10M in new gifts/funds received.)
 - FY 26 - \$310M (Goal to add \$12M in new gifts/funds received.)
 - FY 27 - \$339M (Goal to add \$14M in new gifts/funds received.)
 - FY 28 - \$372M (Goal to add \$16M in new gifts/funds received.)

- Philanthropic Culture Mind-Set
 - Explore building a pipeline of incoming Foundation Board members who have desired skills plus ability and inclination to give at the \$100,000+ level.
 - Strengthen the Development Committee to support fundraising goals. Add Vice President – Philanthropy as the university to the committee.
- Review internal processes related to gift fund transfers to the university to ensure accuracy, efficiencies, and donor intent.
- Educate and inform Advancement staff and campus partners on endowment performance, investment strategy, stock gift processes, and donor fund usage.

Summary of an Aspirational Memphis Advancement Organization Achieved Through the Strategic Plan

Through this strategic plan, we aspire to create a sustainable and mature model of advancement that not only supports the immediate needs of our institution but also lays the groundwork for long-term success. Together, we can cultivate a thriving culture of philanthropy and engagement that empowers the University of Memphis to achieve its ambitious goals, enrich the student experience, and positively impact our community for generations to come.

Advancement Maturity Model Matrix

Engagement			
Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
Engagement programming is fragmented and uncoordinated outside of chapters and a few larger-scale events for general alumni based around athletic events	Demand-driven programming is sourced from the university through a dedicated Engagement Consultant team member	Alumni and friends can easily find and sign up for meaningful opportunities to engage with the university through an online engagement portal	The engagement continuum shows measurable progress from student to mature alumni stages
Communications			
Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
Advancement communications are fragmented and inconsistent; brand confusion exists around organizational purpose and membership	Advancement communications are intentionally timed and create a consistent, purposeful message	Advancement content delivers meaningful, consistent value and builds trust as evidenced by data trends such as open rates, interaction with	Interest tags segment audiences to deliver dynamic Advancement content that is meaningful, timely and fresh based on interests and affinities

		content and conversions	
Metrics			
Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
Advancement activities are repetitive, reactive and not well aligned or coordinated with an overall Advancement or university strategy; long-term goals are not well defined	Defined Advancement KPIs establish a baseline to use in strategic plan	Established growth model shows an increase in meaningful engagement and giving within alumni and friends populations	Staff and boards are held accountable to KPIs and use real-time dashboards to drive strategic iteration, growth and refinement
Events			
Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
Advancement events are uncoordinated, poorly staffed, reactive, not scalable, and unmeasured	Calendaring, planning and follow-up done in collaboration with Advancement and the university allows for appropriate resource deployment and higher likelihood of event success	Signature Advancement events are defined and enhanced for the highest ROI and participation; resources are strategically deployed to the highest-return events	Advancement events are consistently delivered, purpose-driven, attended and coordinated with all appropriate campus partners
Talent and Staffing			
Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
Staff expertise, pace and leadership are lacking; the number of team members is too low, duties are poorly organized and unrelated to position descriptions and outcomes	Individual staff roles and duties are defined and transitioned; additional staff are added to allow for delineation of programmatic and administrative functions	Team member expertise is solid; external stakeholder success is at the forefront of all activity outcomes	Each staff member of the team has deep expertise and contributes growth-minded, strategically focused, and high-paced, high-return effort
Systems and Data			
Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing

Advancement systems are not interconnected, data are inconsistent, manual processes dominate the workflow, transfers from/to/within various budgets interrupt strategy, policies are out of date or missing, contract responsibility and utilization is fragmented	Some Advancement systems are interconnected, plans for updating CRM data are in place, some processes are automated, some budgets are combined, needed policies are identified, contract usage and renewal dates are summarized	Most Advancement systems are interconnected, most processes have been reviewed and automated where possible, one Advancement budget with unit/team responsible line items exists and is managed strategically, contracts are determined for renewal or sunseting	All Advancement systems are interconnected, data are updated in CRM with a plan for sustainable refreshment and appends, processes have been reviewed and automated where possible, policies are in place, essential contracts are current, data are used for strategic decision making
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Fundraising

Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
Fundraising efforts are inconsistent and not tied to university or Advancement strategic plans, prospect investment conversations start at the minimum gift level, solicitations are based on university priorities and not on donor-centered initiatives, no unit/college fundraising goals exist, fundraisers are not consistently asking for endowments or planned gifts	Fundraising efforts are sometimes tied to university, college, and/or Advancement strategic plans, prospect investment conversations start with the impact a donor wants to make, prospect conversations are shifted away from only university priorities and to donor-centered initiatives, some units/colleges have fundraising goals, fundraisers are beginning to ask for endowments or planned gifts, stewardship is delivered regularly	Fundraising efforts are tied to university, college, and/or Advancement strategic plans, prospect investment conversations build on desired donor impact, prospect conversations are donor-centered, units/colleges have fundraising goals, fundraisers consistently ask for endowments and planned gifts, stewardship is consistent and personalized	Fundraising efforts are tied to university, college, and Advancement strategic plans. Transformational gifts are planned and cultivated strategically, blended gifts are commonly solicited, production is above peer benchmarks, stewardship is highly customized by donor and gift

Gift Processing

Level 1 Initial/Level-Setting	Level 2 Progressing	Level 3 Accelerating	Level 4 High-Performing
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Inconsistent pledge forms, unfocused gift agreement templates and approval process, extended time to process and book gifts and pledges, some commitments are booked incorrectly	Pledge forms are updated, new gift agreement templates and approval processes are in place, time to process and book gifts and pledges has been reduced, few commitments are booked incorrectly	Pledge forms are streamlined, gift agreement templates and approval process create an acceptable donor experience, time to process and book gifts and pledges has been significantly reduced, commitments are rarely booked incorrectly	Pledge forms are streamlined, gift agreement templates and approval process create an exceptional donor experience, time to process and book gifts and pledges meets/exceeds industry standards, commitments are rarely booked incorrectly per industry standards
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Advancement KPIs

	FY 2020	FY 2021	FY 2022	FY 2023
New Gifts & Commitments	\$33,715,000	\$36,726,000	\$51,851,236	\$36,246,964
Alumni Donor Count	5,273	6,024	5,869	4,920
Total Donor Count	8,234	9,041	10,786	9,641

FY 2024	FY 2025
\$37,261,170	\$64,899,090
4,438	4,246
9,208	8,716

5. Additional Business

Presented by Robert Carter

6. Adjournment

Presented by Robert Carter