



Implementing a Comprehensive Giving Campaign:

COMPLETE THE CIRCLE

The University of Texas at Arlington

Endowed Scholarship Initiative

Patrick Reyes

UT System Center for Enhancing Philanthropy

July 2017

BUILDING AND IMPLEMENTING A COMPREHENSIVE ENDOWED SCHOLARSHIP CAMPAIGN

Patrick Reyes
UT System Center for Enhancing Philanthropy

UTA follows strategic initiatives that promote academic excellence in a wide array of fields, stemming from nursing and health innovation to planning and public relations. In order to take a university to the next level, active donor participation is encouraged especially in our alumni community. Working at the forefront of all of the advancements that happen every day at UTA are the students. This implementation plan maps out the process of a campaign to raise for \$25,000 endowed scholarships that go to support the talent and excellence UTA seeks to uphold.

INTRODUCTION

Philanthropic engagement serves at the crux of what makes an institution for higher education excel in areas such as academics, research, and athletics. More so than this, universities work to focus impact on their surrounding communities. Driving the economic development of the North Texas region is the University of Texas at Arlington that sits at the peak of academic innovation and cutting edge research – UTA is a powerhouse in molding the best and brightest minds.

UT Arlington is built by a mosaic of students who come from all around the globe – bringing to the North Texas region an exhilarating freshness of perspective. Each and every student is a cornerstone for all that UTA seeks to promote in academic, research, innovation and athletic excellence. Any university would not stop there. We raise the bar each time we meet it, only to make for a university even more accepting of students from all financial backgrounds. Stories of students striving to become something or someone that they never thought they could, drives us to create more opportunity and more financial assistance program available.

This implementation plan has been created to show the exact steps in how to implement a large-scale comprehensive fundraising campaign through the Office of Development and Alumni Relations. In setting goals for this campaign, I recognized the need for two types of goals: my front-end goal that'll be disclosed to our audience and our back-end goals that will function for a more internal purpose.

For this campaign, my front-end goal was to raise as many \$25,000 endowed scholarships as possible and my back-end goal was to optimize our middle in order by upgrading as many people to the 1895 giving society, \$1000 threshold – doing this will pave the way for fundraising success for the future and I thought that was important – to take this campaign and turn it into something more. An endowment is a great way to funnel philanthropic support because they are invested and the only funds that are used from the endowment come from the interest that it accrues, not from the corpus of the endowment. For instance, this \$25,000 endowment would generate (as per current distribution approximations) about \$1,195 to be awarded annually to the recipient of the respective scholarship. Endowment services and intricacies will be broken down in further detail later.

I also saw this as an opportunity to create a timeline for our campaign came to the decision that it would be a 6-month campaign – with 3 months being the quiet phase and another 3 months being our public phase. This does not take into account the time it takes for the pre-planning phase which could very well prove to be another 2 to 3 months.

1. Front End Goal: Establish as many \$25,000 endowed scholarships as possible
 - a. Back End Goal: Optimize our middle by upgrading donors to our 1895 Society/\$1,000 level.
2. Front End Message: Complete the circle. Promoting Academic Excellence through enriching diversity throughout the UT Arlington community.
 - a. Back End Message: “Our Talent. Your Opportunity. Our Excellence.” (University Development message)

It is very important to be open to understanding the big picture when starting a fundraising campaign of this magnitude. A campaign is an investment and a fundraising activity that echoes a widely used mantra: we have to spend money to make money. A campaign must be set up for success from the get-go and that includes the less technical side of the equation: What are the overarching goals?

THE TIMELINE

An enormous piece of any puzzle as big as a comprehensive fundraising campaign in the setting of higher education is solidifying the timeline is crucial to its success. The timeline for a comprehensive campaign can get overwhelmingly complex, but this is more of an attempt to follow a highly revered rule that resonates in the fundraising community: Begin with the end in mind. The key to a successful campaign is to visualize the process. From here, we execute the

plan one step at a time making sure to give ourselves enough time in each phase to conduct all necessary preparations and action items. This emphasizes the importance in every building block for a campaign. The timeline starts off at a basic level mapping out the phases that are involved in the campaign, and exactly what preparations need to be made within those phases.

Pre-Campaign Planning Phase

- Assess internal readiness, timing, and conduct feasibility study
- Set front-end and back-end goals
- Create your gift tables and your prospect lists
- Develop communication plan
- Set metrics in order to avoid end-of-campaign impact evaluation fluster

Quiet Phase

- Select a date when gifts will start counting towards campaign goal
- Solicit gifts lead gifts from longtime donors
- Finalize campaign case for support
- Generate communication tools for public phase

Public Phase

- Publicly launch campaign through formal events, social media and crowdfunding platforms
- Continue accepting major gifts from longtime supporters
- Begin soliciting Future Donor segments, GOLDS, mid-level lybunts, sybunts, and pybunts.
- Tell impactful stories along the way and refresh results regularly

Late Public Phase

- Push back the campaign close deadline in order to make up for any units that have not reached goal
- Begin utilizing our crowdfunding platform as to its fullest extent in promoting the campaign and to push the units that have not met goal yet over the edge
- Begin using phonathon script language to establish urgency in our support base
- Begin soliciting Future Donor segments, GOLDS, mid-level lybunts and sybunts.
- Tell impactful stories along the way and refresh results regularly

Campaign Closing and Stewardship Phase

- Begin using phonathon script language to establish urgency in our support base
- Begin soliciting Future Donor segments, GOLDS, mid-level lybunts and sybunts.
- Tell impactful stories along the way and refresh results regularly

PRE-CAMPAIGN PLANNING PHASE: BUILDING OUR GIFT TABLES

For a campaign that signifies and represents the most integral representatives of our university, the students, it's important to structure our prospect list to accommodate to some the most integral representatives of our alumni base. Mid-Level donors serve as our past, present, and future of any nonprofit's fiscal health and community presence. Mid-Level donors are extremely valuable because this is the population that we pull from to solicit initial major gifts if giving history proves consistent, annual support and affinity for the university is apparent.

When building a gift table, it serves as not only a model from which you identify what will take you to your campaign goal, but also a baseline starting point in showing you exactly who your target audience will be. It is essential that when planning a comprehensive campaign of any magnitude that a gift table be created in order to begin understanding the constituency we will be appealing to. When dealt with the task to build and implement a comprehensive campaign that revolves around student scholarship, one must consider all the possible avenues in achieving the campaign goal: To raise ten \$25,000 endowed scholarships. This specific goal later changed when it came time to discuss implementation of the campaign to being only 8 endowed scholarships – one per college unit.

We can develop and map out as many gift tables as we want, but as we go through the entire process of creating a campaign we hit snags that force us to understand our university, our alumni, and our donors a little more. These snags need to be welcomed as they are almost directly linked to the success of a comprehensive campaign such as this one. The process of finding the best way to structure a giving campaign starts here and it is key to identify as many possibilities as every campaign goal can be achieved by driving down a number of different roads.

Blackbaud's the Raiser's Edge works as a go-to CRM database for fundraisers in many subsectors of the nonprofit industry – this is the database that was used to pull my queries that helped me identify the feasibility for each gift table.

The preliminary queries for this campaign were pulled using the following basic parameters:

1. Building Queries

a. Direct Mail (Non-renewals) (Export)

- i. Create a query that pulls constituents who have given at the leadership (1895 level) of \$1,000 consecutively three years in a row (FY 14, 15, 16) but not this FY 17. This query is being pulled as a constituent list for a direct mail appeal, so set the criterion and outputs accordingly. Include proper attributes, negate the "no valid address" check box and the "include deceased constituents" check box.

- b. Direct Mail (Non-upgrades) (Export)
 - i. Create a query that pulls constituents who have given between \$50 and \$100 consecutively three years in a row (FY 14, 15, 16) but not this FY 17. This query is being pulled as a constituent list for a direct mail appeal, so set the criterion and outputs accordingly. Include proper attributes, negate the “no valid address” check box and the “include deceased constituents” check box.
- c. email (Non-renewals) (Query – no export)
 - i. Create a query that pulls constituents who have given at the leadership (1895 level) of \$1,000 consecutively three years in a row (FY 14, 15, 16) but not this FY 17. This query is being pulled as a constituent list for an e-solicit appeal, so set the criterion and outputs accordingly. Include proper attributes, check the “no valid address” check box and negate the “include deceased constituents” check box.
- d. email (Non-upgrades) (Query – no export)
 - i. Create a query that pulls constituents who have given between \$50 and \$100 consecutively three years in a row (FY 14, 15, 16) but not this FY 17. This query is being pulled as a constituent list for an e-solicit appeal, so set the criterion and outputs accordingly. Include proper attributes, check the “no valid address” check box and negate the “include deceased constituents” check box.

The gift table below was one of the first I had created to model our campaign. The model puts most emphasis on the lower end of the spectrum as you can see in the column labeled “No. of Prospects Required.” I thought that this would be a good model to test given that it’s a model widely used for campaigns, especially of those that tend to focus on participation-like annual giving campaigns. When conducting a feasibility test, I found that a campaign like this, for each of the 8 colleges at UTA, would be very possible and a great option. The biggest issue was the fact that this structure does not support our back-end goal of optimizing our middle 1895 society level/\$1,000 level of giving. Our middle needs to strengthen, and also it is always a gamble entrusting practically the entirety of your campaign on donors who are not as engaged. This can spell out a host of problems especially when it comes to our other schools that perform less in terms of reeling in philanthropic support.

Upgrades - 10 % Lead Gift - Mini Campaign (total \$25,000)						
Query Names	Prospect Criteria*	Gift Amount	No. Gifts Requir	No. Prospects Required	Subtotal	Campaign Phase
PR - MPROP 1	\$1,000 - \$ 2,500**	\$2,500.00	1	4	\$2,500.00	Silent Phase
PR - MPROP 2	\$750 - \$1,000**	\$1,000.00	5	20	\$5,000.00	Late Silent Phase
PR - MDM (EM) 3	\$500 - \$750	\$750.00	8	32	\$6,000.00	Public Phase
PR - MDM (EM) 4	\$250-\$500	\$500.00	10	40	\$5,000.00	Public Phase
PR - MDM (EM) 5	\$100 - \$250	\$250.00	16	64	\$4,000.00	Public Phase
PR - MDM (EM) 6	<\$100	\$100.00	25	100	\$2,500.00	Public Phase
Totals		\$5,100.00	65	260	\$25,000.00	

The second gift table shown below is an example of a structure that is built around a 20% lead gift. There are positives to this structure. Say if the 20% lead gift is obtained during the silent phase of our campaign, our endowment for that scholarship can begin to be set up as there is a 20% down payment requirement for endowments established at UTA.

Granted, this endowment would not begin paying out to students until all pledges and the remainder of the endowment are paid in full – then and only then will the endowment begin to reward students. The negative was that this gift table shows little diversity of funds receivable starting our campaign on an already awkward note with that much less of an audience.

This range does not call to any participatory giving at all, making it hard to reach out to Graduates of the Last Decade (GOLDS) and other Future Donors. Diversifying our fund pool would set us up for a much better success and make us less vulnerable to campaign stall.

Renewals - 20 % Lead Gift - Mini Campaign (total \$25,000)						
Query Names	Prospect Criteria*	Gift Amount	No. Gifts Requir	No. Prospects Required	Subtotal	Campaign Phase
PR - MPROP 7	\$2,500<*	\$5,000.00	2	8	\$10,000.00	Silent Phase
PR - MDM (EM) 8	\$1,000 - \$2,499	\$2,500.00	4	16	\$10,000.00	Late silent Phase
PR - MDM (EM) 9	\$1,000.00	\$1,000.00	5	20	\$5,000.00	Public Phase
Totals		\$8,500.00	11	44	\$25,000.00	

Below are two gift tables that are very different from the previous two. These gift tables represent a total amount of \$250,000 raised divided into two parts. The reason why I wanted to dig deep into this was to see if it was a possible and efficient to plan a campaign that focuses on the central goal being a dollar amount we pulled from thin air. The good thing about this approach was that it really did make for a great deal of diversification from our expected donor pool. We were able to plan for it in both a 10% and 20% lead gift approach.

We had a lot of trouble taking this gift table approach seriously because we just could not see exactly how this would play out in the grand scheme of things. We are big proponents of “beginning with the end in mind,” and so when constructing these gift tables, we decided that it would make for very shifty implementation and our message would be hard to hone in on. Also, this does not reflect the “one at a time” approach that we have come to be so comfortable with – as this is a method that would fit well around fundraising one scholarship for each college instead of trying to meet a thermometer type dollar goal.

Upgrades - 10 % Lead Gift if parsed out to reflect \$125,000 (1/2 of total) goal.						
Query Names	Prospect Criteria*	Gift Amount	No. Gifts Requir	No. Prospects Required	Subtotal	Campaign Phase
PR - CPROP 10	\$1,000 - \$ 2,500**	\$2,500.00	5	20	\$12,500.00	Silent Phase
PR - CPROP 11	\$750 - \$1,000**	\$1,000.00	25	100	\$25,000.00	Late Silent Phase
PR - CDM (EM) 12	\$500-\$750	\$750.00	40	160	\$30,000.00	Public Phase
PR - CDM (EM) 13	\$250-\$500	\$500.00	50	200	\$25,000.00	Public Phase
PR - CDM (EM) 14	\$100 - \$250	\$250.00	80	320	\$20,000.00	Public Phase
PR - CDM (EM) 15	<\$100	\$100.00	125	500	\$12,500.00	Public Phase
Totals		\$5,100.00	325	1300	\$125,000.00	

Renewals - 20 % Lead Gift if parsed out to reflect \$125,000 (1/2 of total) goal.						
Query Names	Prospect Criteria*	Gift Amount	No. Gifts Required	No. Prospects Required	Subtotal	Campaign Phase
PR - CPROP 16	\$2,500-<**	\$5,000.00	10	40	\$50,000.00	Silent Phase
PR - CDM (EM) 17	\$1,000 - \$2,499	\$2,500.00	20	80	\$50,000.00	Public Phase
PR - CDM (EM) 18	\$1,000.00	\$1,000.00	25	100	\$25,000.00	Public Phase
Totals		\$8,500.00	55	220	\$125,000.00	

The gift table just below was a wonderful option. In fact, this option was the model that I based the entire campaign around initially. The reason being was that it focused on strengthening our middle very well and that it did a good job at also focusing on bringing in a high amount of lower-level donors into the mix as well. An issue was that it was a very major gift heavy set up – and it had no central message to build on given that this campaign model was not college unit centric, therefore it was not donor centric.

This model still followed the \$250,000 goal that we pulled from nowhere that ended up being a dead end for us when we came to the realization that during implementation it would be difficult to communicate with our base in a personalized manner. This gift table does not set ourselves up to speak to individual experiences and passions.

Upgrades - 10 % Lead Gift as it pertains to total \$250,000 goal. (Major Gift Heavy)						
Query Names	Prospect Criteria*	Gift Amount	No. Gifts Required	No. Prospects Required	Subtotal	Campaign Phase
PR - CPROP 19	>\$10,000**	\$25,000.00	3	12	\$75,000.00	Silent Phase
PR - CPROP 20	\$5,000 - \$10,000**	\$10,000.00	6	24	\$60,000.00	Silent Phase
PR - CPROP 21	\$1,000 - \$5,000	\$5,000.00	11	44	\$55,000.00	Late Silent Phase
PR - CDM (EM) 22	\$500 - \$999	\$1,000.00	40	160	\$40,000.00	Public Phase
PR - CDM (EM) 23	\$250 - \$500	\$500.00	30	120	\$15,000.00	Public Phase
PR - CDM (EM) 24	\$100 - \$250	\$250.00	20	80	\$5,000.00	Public Phase
Totals		\$41,750.00	110	440	\$250,000.00	

The gift table below is the approach that was ultimately used as a model for our campaign. It is important to note that this gift table was something that came to fruition very deep into creating this implementation plan. We had already created a gift table that was to be used for this campaign early on in the process, but as we continued looking at the feasibility of the campaign, the back-end goals, and the front-end goals, we realized that it was best to create an entirely new gift table from scratch, and this was that result.

The most interesting thing about this gift table is that it was created to focus on our mid-level donors to upgrade them to the \$1,000 (1895 Society) level. I also saw that it was important to focus on upgrading low-level donors to the \$100 level – helping us take this campaign far beyond

Upgrades - 10 % Lead Gift - Mini Campaign (total \$25,000)						
Query Names	Prospect Criteria*	Gift Amount	No. Gifts Required	No. Prospects Required	Subtotal	Campaign Phase
PR - MPROP 1	\$1,000 - \$2,500**	\$2,500.00	2	8	\$5,000.00	Silent Phase
PR - MPROP 2	\$750 - \$1,000**	\$1,000.00	10	40	\$10,000.00	Public Phase
PR - MDM (EM) 3	\$500 - \$750	\$750.00	5	20	\$3,750.00	Public Phase
PR - MDM (EM) 4	\$250-\$500	\$500.00	7	28	\$3,500.00	Public Phase
PR - MDM (EM) 5	\$100 - \$250	\$250.00	5	20	\$1,250.00	Public Phase
PR - MDM (EM) 6	<\$100	\$100.00	15	60	\$1,500.00	Public Phase
Totals		\$5,100.00	44	176	\$25,000.00	

the 6 months that it will run. A gift table and implementation plan like this will help in upgrading donors to a major mid-level society and start low-level donors on a path up the pipeline as well.

THE QUIET PHASE: OUR CASE STATEMENT

The case statement should mostly represent the why, how, where, who, and when of the campaign – giving our audience some food for thought.

COMMITTED DONORS
OUR DONORS HELP STUDENTS ACHIEVE THEIR DREAMS AND BETTER OUR COMMUNITIES

"Education changes lives, builds confidence and develops individuals with strong critical thinking skills. We wanted to make this financial commitment to help students achieve their goals."

SHIRLEE '70 AND TAYLOR GANDY
Shirlee and Taylor Gandy have been prolific supporters for our UT&A community, working to help assist our next generations through their generosity. They established the Shirlee and Taylor Gandy First Generation Scholarship, providing some of our most promising future leaders.

"International experience has helped me become a better manager by making me more appreciative of other people and their world views. I wanted the next generation of leaders to have that same passion for inclusion."

JACQUALYN FOUSE, PHD '82 '84 '12'
Dr. Jacquelyn Fouse recognizes that through the right support system and hard work, anyone can achieve success. Dr. Fouse established the Jacquelyn A. Fouse Endowed Scholarship and the Jack and Doris Fouse Scholarship for Study Abroad, emphasizing the importance of global educational exposure.

CONNECTING TALENTED STUDENTS TO COMMITTED DONORS

(NAME)
Assistant Director for Development
817-272-4818 | info@utarda.edu

(NAME)
Assistant Director for Development
817-272-4818 | info@utarda.edu

Development & Alumni Relations
705 S. Reddeman Drive
Arlington, TX 76019
817-272-7878

UNIVERSITY OF TEXAS AT ARLINGTON

TALENTED STUDENTS
OUR STUDENTS LIE AT THE HEART OF OUR UNIVERSITY AND REPRESENT OUR FUTURE LEADERS

PURSuing EXCELLENCE TOGETHER. COMPLETING THE CIRCLE

"A scholarship let me know that there were people outside my family who believed in me. It let me know that others wanted me to achieve success."

KENDAL MCKIRZIE
Electrical Engineering | Graduation Date: 2016
Kendal McKirzie is an aspiring Electrical Engineer, and through the help from Shirlee and Taylor Gandy, Kendal's vision of the fresh line has become clearer. Kendal recognizes that when he graduates and continues his success, he can one day come back to UT&A, support students like him, and complete the circle.

"This scholarship allowed me to experience another culture and led to a greater awareness of how people live around the world. It allowed me to reach beyond my goal of earning a degree."

NANCY CABRERA
International Business Administration | Graduation Date: 2017
Nancy Cabrera is a brilliant mind who has been able to take her classroom education and transfer it across seas. Nancy studies international business and has given the opportunity to study abroad – an opportunity made possible by the Jack and Doris Fouse Scholarship for Study Abroad.

THE UNIVERSITY OF TEXAS AT ARLINGTON

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UNIVERSITY OF TEXAS AT ARLINGTON

The image shown above is the look of the cover page, and the back of the case statement spread out – but if we open the case statement up and see what is on the inside, we decided to be strategic in how we incorporated the “complete the circle” theme. The circle is seen connecting our students with the donors that have played integral roles in their success, but we made sure to make the circle a little more subtle so that way when the recipient of this case statement unfolds the spread one more time – another, bolder, circle is shown with the main call to action in the center.

“Complete the circle” functions as both the name *and* the call to action for this campaign – and it works as an up-front yet subtle way to invite the prospect without them having to look even further than the title – but my goal was for the title to be open ended enough for the prospect to feel inclined to dig a little deeper into our initiative. Completing the circle means to join not just to give – to be a part of all the amazing things that UTA is doing for our community.

In this case statement, I made sure to push our campaign initiative front and center by putting both our students and donors front and center – I made sure to create a sense of linkage

"WHAT BETTER WAY TO GIVE BACK THAN BY CONTRIBUTING TO UTA IN A TANGIBLE WAY THAT DIRECTLY IMPACTS TALENTED STUDENTS?"
- VERONICA RUANO, DONOR

Our scholarship initiative is built on the idea that we are all products of our education.

OUR EXCELLENCE
OUR STUDENTS HAVE HAD TO BE A PART OF THE TOP 100 HIGHER EDUCATIONAL EXPERIENCE THAT CAN IMPROVE SO THAT THEY CAN HAVE A POSITIVE IMPACT ON OUR LOCAL, STATE, NATIONAL, AND GLOBAL COMMUNITIES.

Students come from all walks of life, each and every student brings to the University of Texas at Arlington, their perspective, their passion, their excellence in our North Texas community. UTA strives to foster the best of the best and to those amazing students who return to our community to help spark economic growth. Our students are charged and soon to continue to reach incredible progressions in healthcare, business, public affairs and policy, architecture, science, social work, education, engineering, and the liberal arts. They carry on the excitement from the classroom into the workforce. Our alumni have the skills that they are taught at UTA and are able to become successful members of our community.

OUR STUDENTS SET THE STANDARD

- U.S. NEWS & WORLD REPORT RANKS UTA 17TH AMONG NATIONAL UNIVERSITIES FOR UNDERGRADUATE STUDENT DIVERSITY.
- OUR STUDENTS HAVE THE HIGHEST AVERAGE STUDENT TEST SCORES AMONG NATIONAL UNIVERSITIES.
- U.S. NEWS & WORLD REPORT RANKS MORE THAN 30 OF OUR MAJOR PROGRAMS AMONG THE NATION'S BEST.
- OUR MAJORS RANKED FIRST IN THE TOP METRICS FOR SOCIAL MOBILITY.

YOUR OPPORTUNITY
OUR STUDENTS DON'T GET LAZIER BY FINANCIAL CIRCUMSTANCE, AND YOU'RE THE KEY TO MAKING SURE THEY CAN GET INTO THEIR FAVORITE PROGRAMS.

Getting involved is simple. There are so many ways to get back to UTA, and we welcome any showcase of support for our university and our students. Each \$25,000 commitment creates a scholarship that will give a deserving student the support they need to achieve excellence.

On top of this, every scholarship will last in perpetuity, turning a donation into an everlasting legacy in the gift that will keep giving.

You have the opportunity to complete the circle, and to come back to UTA with a new goal to help a student walk across the stage and reach their dreams, no matter their financial situation.

FIND OUT HOW YOU CAN MAKE A DIFFERENCE

ANNUAL GIFTS
Consider: annual giving is a simple way to create everlasting impact.

SOCIETY MEMBER GIFTS
Become a part of one of our giving societies such as the 1890 Society, the Carlisle Society, or the Edward E. Rankin Society.

MAJOR GIFTS
Large gifts can be used to provide and name whole endowments ensuring your impact and legacy.

CORPORATE CONTRIBUTIONS
UTA welcomes gifts and partnerships with corporations big and small and we also encourage any corporate matching gift opportunities.

STOCK GIFTS
Donating gifts of stock can result in significant impact and can yield capital gains and tax savings to a donor.

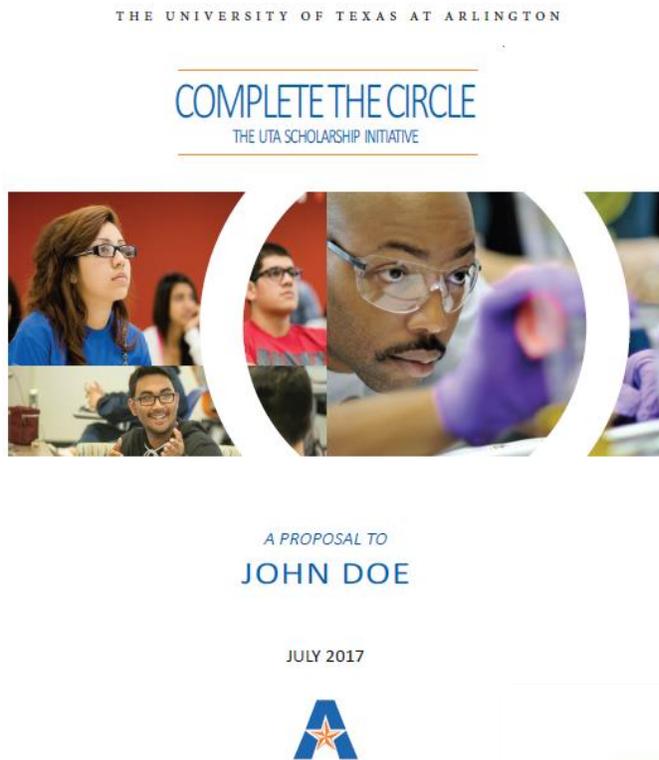
PLEDGES
Make a commitment to fulfill a gift in a specified amount of time, ensuring that a deserving student can count on your support.

"THAT'S WHAT I REMEMBER ABOUT UTA - PEOPLE WHO INVESTED IN ME."
- GUSTAVO ROBLES, STUDENT

And Education is a product of your support for future and current Mavs - making us whole again, and completing the circle.

between them in order to make the “complete the circle” dynamic translate anywhere I can. I introduce circles even in the way our audience will open the case statement – they are already completing the circle just by opening the case statement and just by being interested in this initiative. I also made sure that this case statement had just the right amount of inspiration and information. We also wanted to make sure that we could define what “completing the circle” actually means and why we were building on this idea to communicate with our base. Plain and clear, we straightforwardly defined what our initiative was: “Our scholarship initiative is built on the idea that we are all products of our education and education is a product of your support for future and current Mavs – making us whole again, and completing our circle.”

THE QUIET PHASE: MAJOR GIFT, LEAD GIFT, AND SOCIETY PROPOSALS



When it came time to launch a much more solicitation heavy phase, we knew that we wanted to keep with the theme in every which way we could, all the while not giving the proposals a DNA that is of nothing we have ever put out before. This was the biggest challenge. Making each page of this proposal a testament to our scholarship initiative with its own uniqueness and identity, all the while getting it to fall into the same realm of the design and content language that has been built on for years.

This proposal shown in particular is only one out of the six that we created. This proposal contains a full endowment ask for \$25,000. The key was to keep with the same layout. The page to the right is the very first page our prospect sees. We knew that if the reader was to only read this page that they got the full picture. We used this page as an opportunity to explain to our prospect just how much impact their gift will have on this endowment initiative, what an endowment is, and the impact that each endowment will have on our wonderful students.

ENDOWING STUDENT SUCCESS EXECUTIVE SUMMARY OF YOUR PHILANTHROPIC SUPPORT

The University of Texas at Arlington respectfully requests your **philanthropic support of \$25,000** to make the pursuit of a college degree accessible to deserving students. **Your gift to help endow a scholarship** will impact UTA's many talented students and accelerate the University's progress as a top-tier school of choice for students around the globe.



As a part of the UTA Complete the Circle scholarship initiative, your gift will create one endowed scholarship in support of deserving students a part of the **College of Social Work**. Your passion and roots run deep with the school, its students and its mission to advance the field of social work.



According to the UTA Office of Financial Aid, **63 percent of students rely on financial support** to fund their higher education. **A gift of \$25,000** will ensure that many students will have the resources needed to concentrate on their studies and graduate sooner with a more comprehensive understanding of their chosen field.

Thank you for your consideration of this proposal and for the opportunity to discuss how you can make a difference in the lives of our students.

REQUEST FOR SUPPORT

WHAT YOUR \$25,000 GIFT WILL ACHIEVE:

- FULLY FUND A \$25,000 ENDOWED SCHOLARSHIP FOR THE COLLEGE OF SOCIAL WORK THROUGH OUR COMPLETE THE CIRCLE SCHOLARSHIP INITIATIVE.
- THE \$25,000 ENDOWED SCHOLARSHIP WILL PROVIDE ANNUAL SUPPORT OF APPROXIMATELY \$6,250 FOR A DESERVING STUDENT.
- THIS ENDOWMENT WILL BE SET TO LAST IN PERPETUITY, MAKING YOUR DONATION A TRUE MARK OF LEGACY.

It is also important to note that our executive summary page uses bolded text to draw our reader's eye to the most important parts of the page such as the ask amount. For the second page to our right, we were strategic in the space we had in also incorporating our "Complete the Circle" concept. We created a timeline that chronicles our donor's relationship with our university. This not only shows the time we took to really get to know our prospect but also act as a soft ask as we incorporated in the last item, the graduation year for the first student to have received this scholarship.

YOU AND UTA

MEASURING YOUR DEVOTION TO OUR UNIVERSITY

John Doe graduates from UTA a 1989 part of the College of Social Work.

John Doe graduates from the UTA 1993 masters program in Social Work.

John Doe makes first gift to the 1998 UTA College of Social Work.

John Doe Joins the 1895 Society with a generous gift, and 2007 continues to give consistently.

The first student to have recieved your endowed scholarship 2021 graduates from UTA.



Your commitment to UTA has been inspiring. Having not one but two separate educational experiences with UTA, your clear devotion to our campus has shown through your involvement.

UTA is constantly finding ways to keep its doors wide open for our alumni because our way of thinking is once a maverick, always a maverick.

Your success underscores that we are a product of our education. You have supported UTA consistently and have shown your commitment to higher education. Now is your opportunity to invest in our students with a gift that will help build support that will span for generations.

COMPLETING THE CIRCLE

OUR INITIATIVE AND YOUR ETERNAL IMPACT

For each \$25,000 endowment, is a scholarship that will give a deserving student the support they need to achieve excellence.

Every scholarship will last in perpetuity- turning a donation into an everlasting legacy. It's the gift that will keep giving.

You have the opportunity to complete the circle, and to come back to UTA with a new goal: to help a student walk across that stage and reach their dreams, no matter financial limitations.



"Every student can be great"
Gustavo Robles

"I was accepted to UTA and several other schools, but UTA made me feel like part of the community," Gustavo said.

A Richard Greene Scholarship recipient, Gustavo made the most of his opportunities at UTA. He earned two degrees—in industrial engineering and Spanish—while also minoring in Mexican American Studies and mathematics. Gustavo is now a successful engineer at Lockheed Martin, and he credits his UTA scholarship with helping him surpass what he thought he was capable of achieving.

"Every student can be great. They just need a little push in the right direction."



"I am much more prepared"
Nancy Cabrera

"I couldn't afford time away to study internationally," Nancy said.

Nancy studied in Spain, Portugal, Italy, and Africa after receiving the Jacquelyn Fouse Travel Abroad Scholarship. She describes her experience as transformative because she was able to see how other cultures practiced business, and she gained global awareness as a result.

"There are no words big enough to thank Ms. Fouse. I am much more prepared for my career and have greater confidence in my ability to work with people."

For the page to our left, it was important for us to define what our initiative and "Complete the Circle" really means. We made sure to include student testimonial in this proposal to draw attention to the heart of our cause. It is also important to note that these students can be switched out with students from the prospects respective college unit to play on their specific affiliations with our university a little more. We also saw this as a good time to further define what an endowment is, by talking about its perpetual impact and that it is essentially "the gift that will keep giving." This is one of the only pages that would remain similar across the board for most proposals as it is important to further define the initiative we are inviting our prospect to support. The only opportunity for variable content would be the student profiles discussed.

WHY UTA?

THE MODEL 21ST-CENTURY URBAN RESEARCH UNIVERSITY

Students from around the world are making The University of Texas at Arlington a premier school of choice. Enrollment reached a record 41,932 Texas-based students for the spring 2017 semester, up 8.5 percent from a year ago, with a projected global enrollment of nearly 57,000 in 2016-17. These diverse and talented scholars pursue more than 185 bachelor's, master's, and doctoral degrees in a wide range of disciplines.

OUR STUDENTS SET THE STANDARD

- U.S. NEWS & WORLD REPORT RANKS UTA FIFTH AMONG NATIONAL UNIVERSITIES FOR UNDERGRADUATE ETHNIC DIVERSITY.
- UTA STUDENTS HAVE THE 2ND-LOWEST AVERAGE STUDENT DEBT AMONG NATIONAL UNIVERSITIES.
- U.S. NEWS & WORLD REPORT RANKS MORE THAN 20 UTA GRADUATE PROGRAMS AMONG THE NATION'S BEST.



REQUEST FOR SUPPORT

This proposal details a request to **John Doe** to fully fund an endowed scholarship to benefit remarkable students in perpetuity as a part of our Complete the Circle Scholarship Initiative in the form of **\$25,000**. Our existing endowed scholarships are aimed at our most exceptional students. This new scholarship will be used to attract and retain the world's brightest minds that come from all walks of life.

Students may apply for a Complete the Circle Endowed Scholarship provided they meet the following criteria:

- Must have a 3.0 GPA or higher from their high school or previous institution if they are a first-year student at UT Arlington.
- Must be a full-time undergraduate student.
- Has demonstrated a commitment to serving their community.

Just like in our first page, our last page that has content should revisit the ask. At this point our reader has hopefully gone through this proposal or has at least skimmed through it, so this is a great opportunity to tie it all together by mentioning the ask one more time, the impact that it will have on students, and just to mix it up – the approximate criteria for the scholarship that will be endowed. This is very important in the whole process because all of this can be translated almost directly into our gift agreement and make establishing the endowment that much easier one funds are received or a pledge is made.

Throughout this process of creating proposals for the quiet phase of our campaign, we decided to reference 5 other types of prospective gifts.

- Our 10 % lead gift (\$2,500)
- Corporate Matching gift
- 1895 Society (\$1,000)
- Carlisle Society (Cumulative giving above \$50,000)
- Rankin Society (Planned Gift; Blended gift ask)

Each of these other proposals can be seen at the end of this report. The planned giving proposal will be discussed in greater detail in our *Stewardship Phase*.

THE UNIVERSITY OF TEXAS AT ARLINGTON THANKS YOU FOR YOUR
THOUGHTFUL CONSIDERATION OF THIS PROPOSAL



701 S. Nedderman Drive, Suite 421
Arlington, Texas 76019-0198

THE PUBLIC PHASE: DIRECT MAIL SOLICITATION

Below is the direct mail piece that we culminated to help in our big public push for this campaign. Keep in mind that at this point of the campaign, we have not yet sent out any emails or put our any social media posts that indicate the start of our initiative. This is the first indicator of our initiative. The concept we like to think of is the concept of wedding invitations. Normally, we would want to get a personalized invite to our cousin's wedding in our mailbox before we see them inviting the masses on social media platforms. Therefore we scheduled this direct mail piece to hit mailboxes about 3 days before social media blasts and email follow ups.

We knew we wanted to build on the idea of pairing donors with students who just happened to receive a scholarship that they helped fund or did fund. We thought that this would be a good way to see the circle being completed in other instances, by at the same time giving the prospect the opportunity to be apart of our initiative as well. We recognized the chance to make our direct mail piece work off of the foundation that our case statement and proposal helped set by placing our call to action in the middle of our circle. Additionally, our other side of our direct mail piece is less copy heavy to give it a better breathing feel. We also wanted to incorporate the time line concept that we introduced in our proposals as the majority of recipients from our direct mail pieces will be those who do not have the capacity to give at the "proposal" level just yet.

COMPLETE THE CIRCLE The University of Texas at Arlington SCHOLARSHIP INITIATIVE

Dear John,

Nancy Cabrera is a brilliant mind who has been able to take her classroom education and try it out across seas. Nancy studies international business and was given the opportunity to study abroad- an opportunity made possible by the Jack and Doris Fouse Scholarship for Study Abroad.

Nancy Cabrera
International Business Administration

"This scholarship allowed me to reach beyond my goal of earning a degree"

Come full circle and help deserving students reach their dreams by giving to UTA.

Jacquelyn Fouse, PhD

"I wanted the next generation of leaders to have that same passion for inclusion."

Dr. Jacquelyn Fouse recognizes that through the right support system and hard work, anyone can achieve success. Dr. Fouse established the Jacquelyn A. Fouse Endowed Scholarship and the Jack and Doris Fouse Scholarship for Study Abroad, emphasizing the importance of global educational exposure.

So many student success stories start with donors who have a passion for education and who believe in investing in our future.

Yes! I/We will support UT Arlington with a gift this year. I/We would like to direct my contribution to the following college:

This gift will prepare dedicated and talented students to achieve success. I/We will make a 2017 Complete the Circle Scholarship Initiative gift of:

\$250 \$100 \$50 \$25 Other _____

Please detach this portion of the form and return it using the enclosed envelope. See reverse side for payment options.

Arlington College is established to improve availability of quality education in our newly founded rural city.

1895

The Texas legislature creates our current name, UT Arlington - making us a part of the UT System.

1967

The Complete the Circle scholarship initiative was launched to take availability of quality education to the next step.

2017

The first student to receive a Complete the Circle scholarship will graduate All because of you.

2021

Endow our future leaders. Complete the circle.

Our initiative will help fund scholarships in perpetuity for your College of Social Work

CHECK ENCLOSED MADE PAYABLE TO UT ARLINGTON
 VISA MASTERCARD AMEX DISCOVER

EXPIRATION DATE _____

CREDIT CARD NUMBER _____

NAME (PLEASE PRINT ON THE CARD) _____

PHONE NO. _____

EMAIL _____

MONTHLY GIFTS

Charge my credit card \$_____ on the _____ of each month for the next _____ months, for a total of \$_____.

MY EMPLOYER WILL MATCH MY GIFT

Company Name _____

FOR ASSISTANCE, CONTACT YOUR COMPANY'S OFFICE OF HR

I have enclosed the proper form.
 I will submit electronically.

MY EMPLOYER WILL MATCH MY GIFT

I am interested in learning more ways to include UTA in my estate plans.
 I have already included UTA in my estate plans.

To make your gift online, visit giving.uta.edu/excellence | Or by phone at 817-272-2584

We are an equal opportunity institution. The University of Texas at Arlington is an affirmative action/equal opportunity institution. For more information, contact the Office of Institutional Diversity and Inclusion at 817-272-2584.

THE PUBLIC PHASE: E-SOLICITATIONS

The University of Texas at Arlington
SCHOLARSHIP INITIATIVE

COMPLETE THE CIRCLE
Come full circle and help deserving students reach their dreams by giving to UTA.

GIVE NOW

Nancy Cabrera
International Business Administration
"This scholarship allowed me to reach beyond my goal of earning a degree"

Jacquelyn Fouse, PhD
"I wanted the next generation of leaders to have that same passion for inclusion."

The University of Texas at Arlington
SCHOLARSHIP INITIATIVE

COMPLETE THE CIRCLE
You still have time to come full circle and help deserving students reach their dreams by giving to UTA.

GIVE NOW

Nancy Cabrera
International Business Administration
"This scholarship allowed me to reach beyond my goal of earning a degree"

Jacquelyn Fouse, PhD
"I wanted the next generation of leaders to have that same passion for inclusion."

The University of Texas at Arlington
SCHOLARSHIP INITIATIVE

COMPLETE THE CIRCLE
Last chance to come full circle and help deserving students reach their dreams by giving to UTA.

GIVE NOW

Nancy Cabrera
International Business Administration
"This scholarship allowed me to reach beyond my goal of earning a degree"

Jacquelyn Fouse, PhD
"I wanted the next generation of leaders to have that same passion for inclusion."

Social media and e-solicitation integration is also a very important step in this entire process. When setting up this campaign we wanted to make sure that there was more than just one social media push and we wanted to show that each push was built on the push before further advancing our "Complete the Circle" concept. In doing this we decided to recycle the donors and students by bringing in a new student currently attending the college and a new donor who gave between the first public push and the second, or between the second and the third.

CROWDFUNDING: LATE PUBLIC PHASE (MINI-CAMPAIGN)

When discussing how crowdfunding was to be integrated into our campaign, we knew that we really wanted it to exist not so much as just a communication tool, but as a true fundraising tool. This meant that we wanted to plan to optimize its ability to rope in support and yield measurable results as opposed to just making it another funds-raised thermometer. This led us to decide that we would create a mini-campaign with our campaign, and those college units that had not yet met the goal at this point would be the only colleges displayed on our platform.

This phase is a great time to introduce the platform as to not exhaust our base too early on in the campaign. This would be a good time to also hand over more responsibility to each of the different college units and its students create the video used on the platform. It is important for this video to be of grassroots and personal quality in order to display more authenticity in the message. Each video should be student centric and help advance the message of “Completing the Circle” as it is seen from their perspective. Structuring this as more of a mini campaign will help those colleges in need of an extra push and implementing it this late into our public phase gives us time to strategize on finding key approaches for each college. The colleges who have already funded their endowed scholarships in full will be closed out on our crowdfunding platform and labeled “FUNDED,” but gifts can still be made until the very end as it will only grow our corpus and become a bigger reward or even have the possibility for having more than just one recipient if goal is exceeded by that much.

SPARK UTA Home About Apply Log In

THE UNIVERSITY OF TEXAS AT ARLINGTON

IGNITE IDEAS THAT CHANGE OUR WORLD

COMPLETE THE CIRCLE
THE COLLEGE OF SOCIAL WORK

College of Social Work
By The University of Texas at Arlington

Make your mark on the College of Social Work by helping us in raising \$25,000 for an endowed scholarship for a deserving UTA student that will last forever!

\$10,575

105% **221** **0**
Funded Donors days left

COMPLETE THE CIRCLE
THE COLLEGE OF NURSING AND HEALTH INNOVATION

College of Nursing and Health Innovation
By The University of Texas at Arlington

Make your mark on the College of Social Work by helping us in raising \$25,000 for an endowed scholarship for a deserving UTA student that will last forever!

\$10,575

105% **221** **0**
Funded Donors days left

COMPLETE THE CIRCLE
THE COLLEGE OF ARCHITECTURE, PLANNING AND PUBLIC AFFAIRS

College of Architecture, Planning, and Public Affairs
By The University of Texas at Arlington

Make your mark on the College of Social Work by helping us in raising \$25,000 for an endowed scholarship for a deserving UTA student that will last forever!

\$10,575

105% **221** **0**
Funded Donors days left

CAMPAIGN CLOSING AND STEWARDSHIP PHASE: ENDOWMENT COMPLIANCE, GIFT PROCESSING, AND SCHOLARSHIP DISBURSEMENT

The gifts are in, and let us say just for now, that everything went according to plan. What now? Closing the campaign is almost just as important as it is to launch our campaign. Now is not the time to drop the ball in respect to our donors who gave at any and all levels. There are some technical wrinkles that need to be ironed and some formalities that need to be seen to, but remember that at the beginning of this report, our discussion on beginning with the end in mind. We hope that at this point we have covered most of our bases or have at least set ourselves up for success when it comes to all of the post-campaign intricacies.

Endowment services works to ensure that the process for establishing an endowment is not only helped along but also that the process of making sure that the funds are disbursed regularly and our donors are properly stewarded for their endowment. This poses an issue, though: Not one endowment (unless an endowment was fully funded by a major gift of \$25,000) is owned by one person. It is actually owned by multiple people, all of those who gave to the campaign in favor of the endowment for each college. Therefore the process of amending an endowment can get a bit hairy as it is within our legal obligation to acquire agreement from each and every owner of the endowment.

This is where beginning with the end in mind is very important. We begin knowing that this can become an issue if our criteria for our scholarship is a bit too specific and has no wiggle room. This is why we not only disclose the criteria for the scholarship early on and in our proposals for larger gifts, but we make sure to keep them broad enough for smooth amendment. We need to keep the criteria broad enough so that way disbursement and usage of our endowment interest is consistent and smooth.

“Donor intent” is the big phrase used to describe the central dogma behind endowment services and compliance. Results of not complying with donor intent fall in line with the following:

- The possibility for legal action
- Embarrassment; Anger
- Negative impact on any future initiatives by Development and Alumni Relation including but not limited to future campaigns.

The following are all the parties that play a role in the complex world of endowments.

The Endowment Account Administrator:

- Responsible for ensuring:
 - The endowment distributions are spent
 - All expenditure adhere to the terms of the endowment agreement
 - All documents relating to the endowment and its expenditures are maintained in the department including documentation to support the qualifications of the scholarship recipients and those not selected.

- Backup documentation for expenditures is provided to endowment services upon request.
- That the ratio is 2.00 or less unless the fund balance is below \$2,500.
 - Ratio: Accumulations (previous year's funds + Annual distributions)/Annual Distributions

The Scholarship Committee Chair and Members:

- Responsible for ensuring:
 - That the scholarship committees and recipients meet all established endowment criteria.

Scholarship/Financial Aid Office:

- Responsible for ensuring:
 - The appropriate signatures are complete and valid on the Request for Disbursement form.
 - The award for the recipient is disbursed through the university via the accounting system.
 - That these documents are available for audit.

Endowment Services, Office of Development and Alumni Relations:

- Serves as a resource and guide to the department.
- Prepares endowment agreements, deposits gifts and manages the flow of gifts into the endowment corpus.
- Is the liaison to UT System and UTIMCO.
- Keeps permanent university records pertaining to endowments.
- Maintain Mav ScholarShop to make sure that all scholarships are included.

Vice President for Development:

- Responsible for endowment compliance associated with UT Arlington's endowments.
- Chair of the Endowment Compliance Committee, or his designee.
- UT System Designated Endowment Executive.

CAMPAIGN CLOSING AND STEWARDSHIP PHASE: MEASURING IMPACT

Perhaps one of the most important aspects of this phase is figuring out a game plan for sharing with donors, students, parents, and anyone interested just how much we were able to accomplish during our 6-month campaign. Just how many scholarships are going to be rewarded? How many donors contributed to this great cause? What college had the highest participation rate (steer away from overtly mentioning the college that brought in the largest dollar amount as this will raise objection with some of the smaller colleges)?

All of this can be compiled either into a one pager impact statement or a full-fledged impact report. Additionally, we always have the option where we can include results in an annual giving report that is produced by the development team. A section dedicated to the “Complete the Circle” campaign and its success can be cornered off in this annual giving report. Digital news letters are also a great resource to supply informative links or to include an infographic with the most key results that came from the campaign.

CAMPAIGN CLOSING: DONOR RECYCLE; PLANNED GIVING

After the end of a large-scale comprehensive campaign much like this initiative, it is always good to remember that even though we may feel like we just burned the candle at both ends, we set ourselves up very nicely to continue moving forward with the concept of completing the circle and the concept of perpetuity and legacy.

This translates very well into Planned Giving and gives us a nice platform to use in acquiring gifts through a will. I have included all of my compiled documents at the end of this report and amongst them, you will find a Planned Giving integrated proposal. In this proposal, I made sure to make it a blended gift, incorporating an out-right payment of \$2,500 to help us build on our endowment corpus at this very point in time, but also introduces the conversation for consideration of a testamentary gift.

We come across so many great mentors in this industry who say that they fell into philanthropy – a series of events that led them to this chance to make a difference in our world and in the world of so many students. Maybe philanthropy is not something that we fall into but something that falls on us. Something that landed on our laps and we dove into it.

In a lot of ways I tried to translate that into this campaign – an opportunity that falls into the laps of our supporters that they dive into to not only complete our circle but to complete theirs too – much like philanthropy has completed so many professionals in this industry, I believe that philanthropy has the capacity to complete every person outside of it – and it is our mission to invite them to be a part of that and to be a part of UT Arlington.

*Thank you, UT Arlington, for giving me more reason to
believe in the power of philanthropy.*

Patrick Reyes
reyespatrick@gmail.com
915-227-0993

