

B&A Minutes 2-21-24

Meeting called to order at 2:30pm

No amendments to minutes from XX meeting. Minutes approved as written

Recognition of guests: none

Old Business: Reminder that 2/24 meeting is cancelled.

New Business: Rodney M. Grabowski & Gina Sholtis: Advancement & partnerships strategic plan update.

3 goals. To have (1) \$100 million in sustainable annual funding (2) \$350 million in endowment (3) 3.3 USNWR peer evaluation rating by FY27. Presented UCF giving history, spike in 2023 driven by naming rights extension to arena. Presented funding to date for AY 24 broken down by college/unit (approx. 34.5 million of 100 million target reached) as well as AY24 performance summary and fundraiser productivity goals. Forecast of \$88-109 million for FY24 with expectation to exceed 100 million. Noted an upcoming closure of an 8 figure gift. 7 associate directors of development hired since 10/31 with a focus on building a pipeline with gifts in the 25-99k range. Two digital experience officers also hired to focus on building relationships with donors. Reported on hiring a foundation CFO (search ongoing). Endowment data presented, performance above benchmark.

Meeting Adjourned: 3:25pm



UCF ADVANCEMENT & PARTNERSHIPS STRATEGIC PLAN UPDATE

Rodney Grabowski, CFRE, SVP for Advancement & Partnerships and CEO, UCF Foundation, Inc.

and

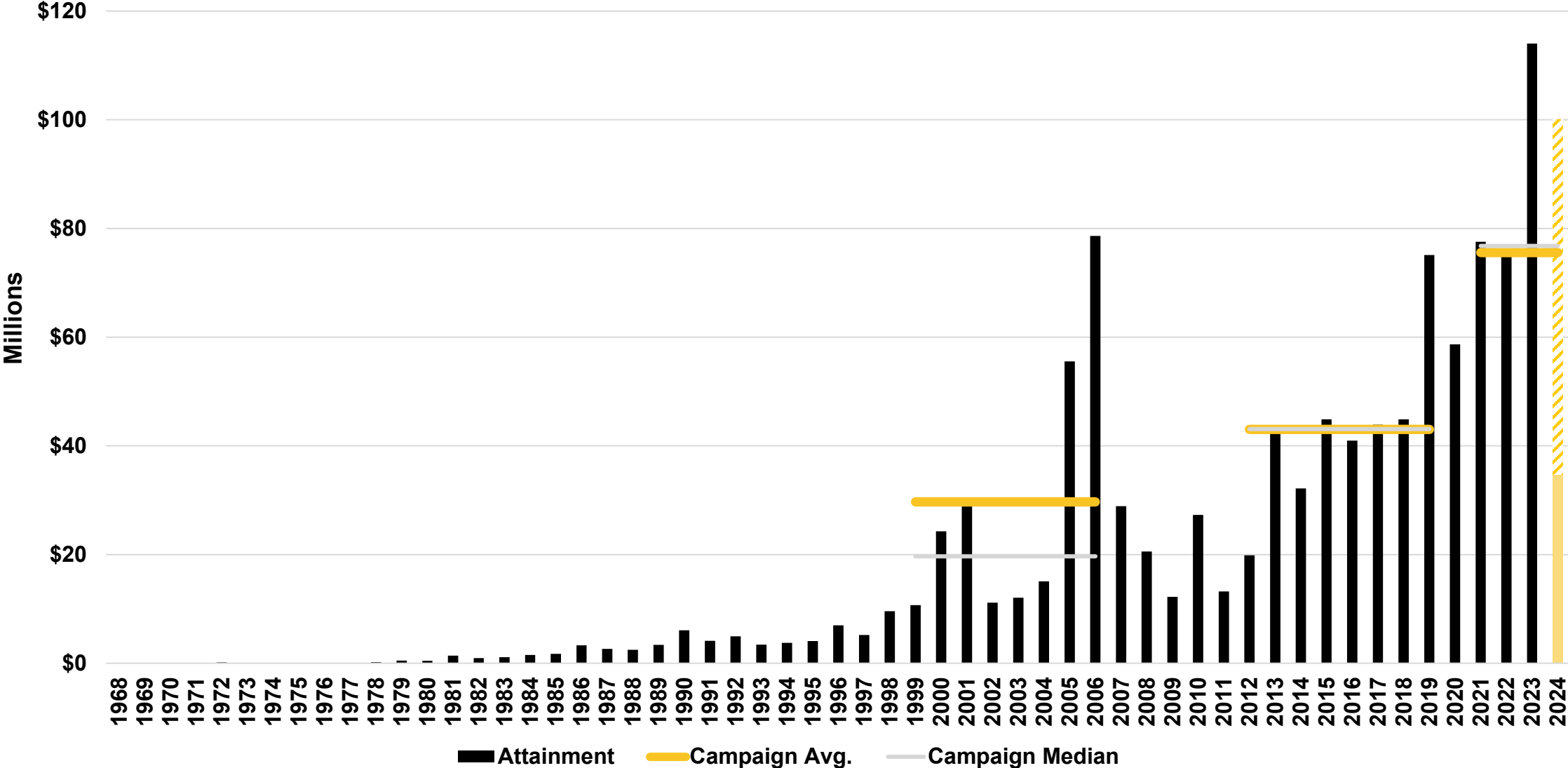
Gina Sholtis, SAVP for Development

February 21, 2024



**GOAL 1: \$100 MILLION IN
SUSTAINABLE ANNUAL FUNDRAISING
BY FY27**

UCF GIVING HISTORY



FY24 ATTAINMENT TO DATE

College/Unit	Goal	Attainment	Percentage to Goal
Arts & Humanities	\$10,000,000	\$1,072,103	11%
Athletics	\$35,000,000	\$19,171,293	55%
Burnett Honors College	\$400,000	\$84,071	21%
Business Administration	\$6,000,000	\$1,188,535	20%
Community Innovation & Education	\$1,500,000	\$67,310	4%
Engineering & Computer Science	\$3,000,000	\$849,646	28%
Health Professions & Sciences	\$600,000	\$283,258	47%
Medicine	\$5,000,000	\$1,206,201	24%
Nursing	\$4,000,000	\$1,620,982	41%
Optics, Photonics, CREOL	\$500,000	\$143,595	29%
Rosen College of Hospitality Management	\$1,000,000	\$150,517	13%
Sciences	\$4,000,000	\$508,202	15%
SSWB	\$4,000,000	\$1,434,419	36%
Undergraduate Studies	\$200,000	\$16,210	8%
WUCF	\$4,000,000	\$2,061,374	52%
Divisions/All Other	\$20,800,000	\$4,588,029	22%
Grand Total	\$100,000,000	\$34,445,745	34%

Data as of 2/15/2024.



FY24 PROPOSAL FORECAST

- **\$88M to \$109M** projected by 6/30/2024
- Closure of an **eight-figure gift** will be important

FY22-24 YTD PERFORMANCE SUMMARY

KPI	FYTD22	FYTD23	FYTD24
Total Attainment	\$26,261,810	\$58,805,311	\$34,445,745
Total Donors	30,797	31,654	38,518
Average Giving	\$853	\$1,858	\$892
Median Gift	\$60	\$60	\$50
Largest Gift	\$5,002,500	\$18,239,896	\$5,524,100

Data as of 2/15/2024

FY24 FUNDRAISER PRODUCTIVITY GOALS

CATEGORY	FY24 GOAL	FY24 PROGRESS	FY24 % TO GOAL
Proposals Submitted	811	436	48%
Proposals Funded	470	201	39%
Visits	4,885	2,274	40%
Qualifications	3,230	873	24%

Data as of 2/15/2024.



GIFT OFFICER RECRUITMENT

- 7 associate directors of development hired since 10/31
- Focused on building pipeline with gifts in the \$25k-\$99k range

DXO PROGRAM LAUNCH

- 2 new Digital Experience Officers hired in January
- Focused on building relationships with 1,000 or more donors



PARTNERSHIPS HIRING UPDATE



AVP, Partnerships to
begin 3/18



Two Executive Director
positions posted

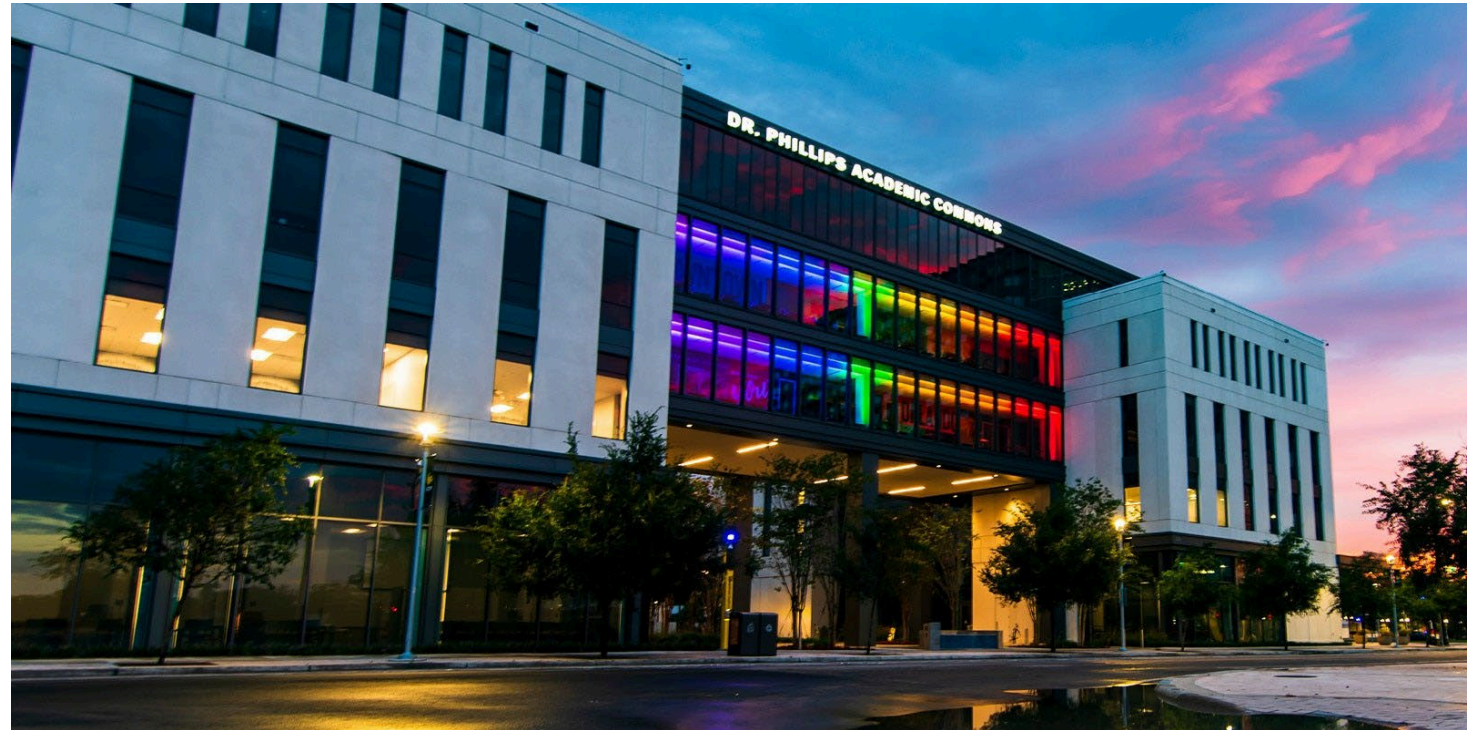


Executive Assistant
position posted

CAMPAIGN PLANNING

February 2024

- Four leadership briefings completed:
 - Atlanta, DC, West Palm Beach, Orlando
- Donor insights survey launch

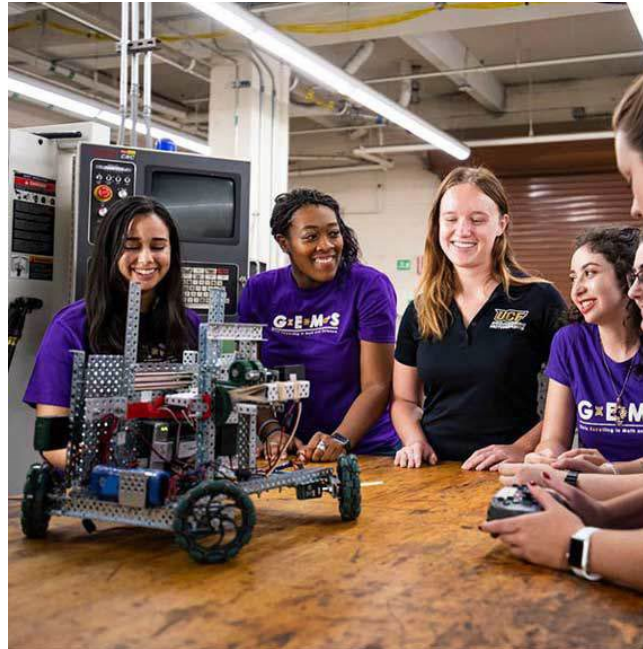




**GOAL 2: \$350 MILLION IN ENDOWMENT
BY FY27**

FOUNDATION CFO

- Executive search being driven by Boyden.
- Three candidates on-site in January.
- Search has resumed.

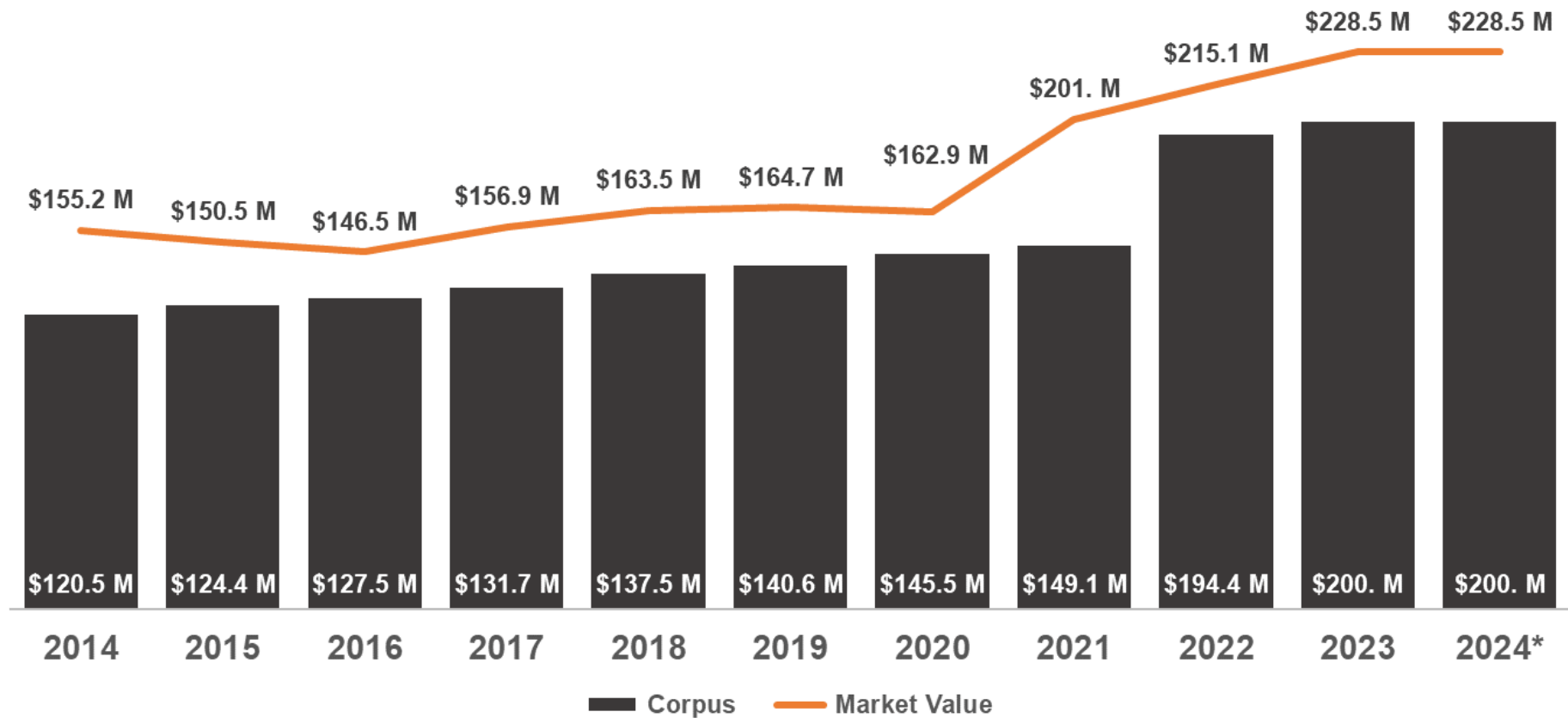


PROPERTY APPRAISAL

- New appraisal completed in December.
- Reviewing the findings in consultation with the Foundation Board and UCF's Office of Real Estate.

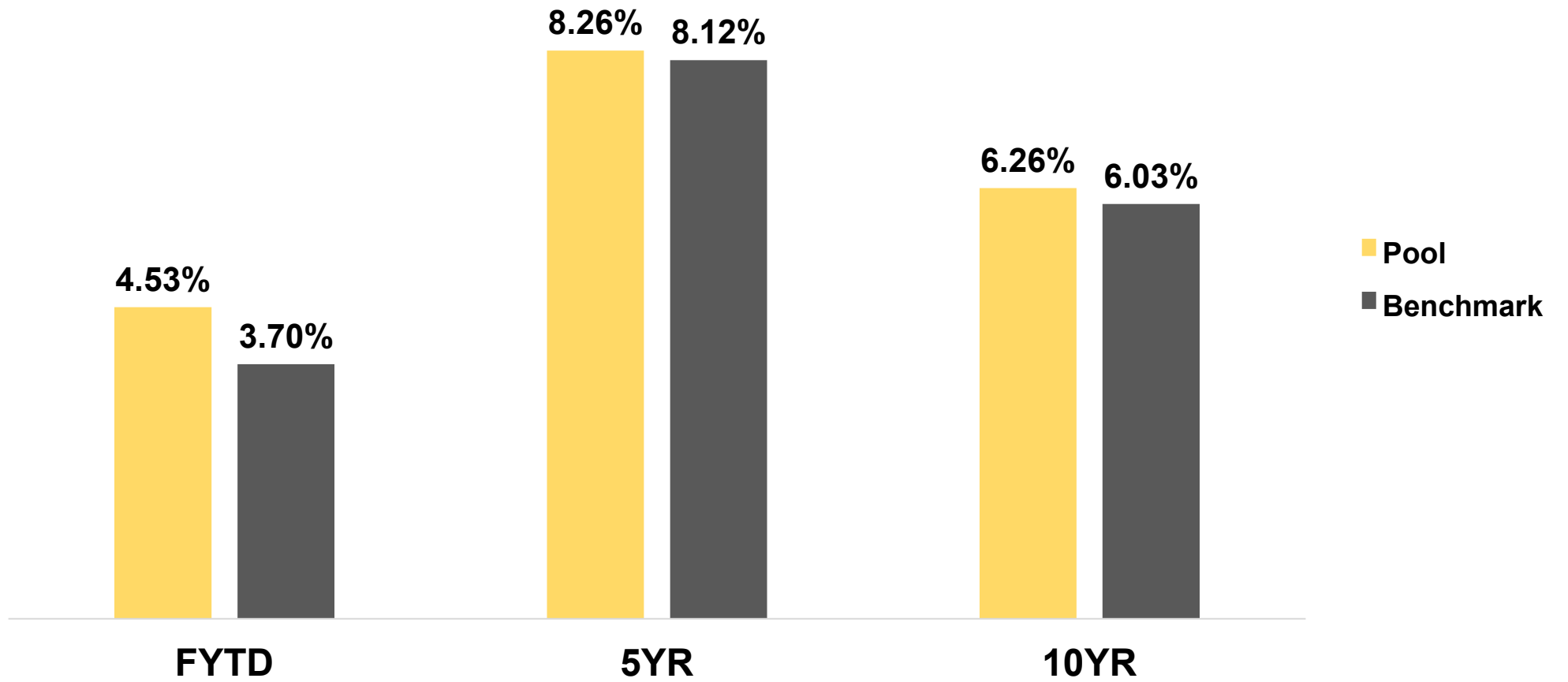


ENDOWMENT GROWTH





ENDOWMENT PERFORMANCE





ENDOWMENT BY COLLEGE OR AREA

Colleges	
College of Business Administration	\$45.68 M
Rosen College of Hospitality Management	\$30.49 M
College of Engineering & Computer Science	\$13.65 M
College of Nursing	\$12.47 M
College of Sciences	\$11.55 M
College of Optics and Photonics	\$11.18 M
College of Medicine	\$10.76 M
College of Community Innovation and Education	\$10.22 M
College of Arts and Humanities	\$9.61 M
College of Health Professions and Sciences	\$1.16 M
Burnett Honors College	\$.72 M
College of Graduate Studies	\$.46 M
College of Undergraduate Studies	\$.31 M
Total College Endowment Value	\$158.25 M

Areas	
President	\$34.37 M
Student Success and Well-Being	\$32.12 M
University of Central Florida Foundation, Inc.	\$8.36 M
WUCF TV	\$1.93 M
Athletics Sports & Administration	\$1.91 M
UCF Global	\$1.14 M
UCF Libraries	\$1.08 M
Office of Research	\$.49 M
School of Modeling, Simulation, and Training	\$.43 M
Office of the Provost	\$.21 M
Human Resources	\$.05 M
WUCF FM	\$.02 M
Total Area Endowment Value	\$82.12 M
Total Endowment Pool	\$240.36 M



GOAL 3: 3.3 USNWR PEER EVALUATION RATING BY FY27



U.S. NEWS BEST COLLEGES RANKINGS

- Increase awareness for UCF's research and academic excellence to increase votes received (unaided awareness).
- Enhance UCF's familiarity with Higher Ed Leaders
- Enhance UCF's rating among target groups who USNWR relies on for reputational rankings



GOALS WITH TARGETS

Expert opinion score is determined by the average of ratings on academic quality it receives from **presidents**, **provosts** and **deans of admissions**.

Peer Assessment Score and Rank

2022	2023	2024	2027
2.9	3.0	3.0	3.3
#142	#121	#124	#81*

*Expert opinion ranking based on 2024 data.



WHAT DO YOU KNOW ABOUT UCF?

37% **+3%**

SIZE - they use terms like big/huge/large to describe UCF. 52% of people in the South use those words as do 41% of VP/VC level people. The higher the level of familiarity with UCF the more likely those terms are used.

25% **+8%**

PROGRAMS - talk about UCF's academic programs. These descriptions are more frequently used by deans as well as respondents from the Northeast and South. They tend to occur with people that are more familiar with UCF.

13% **FLAT**

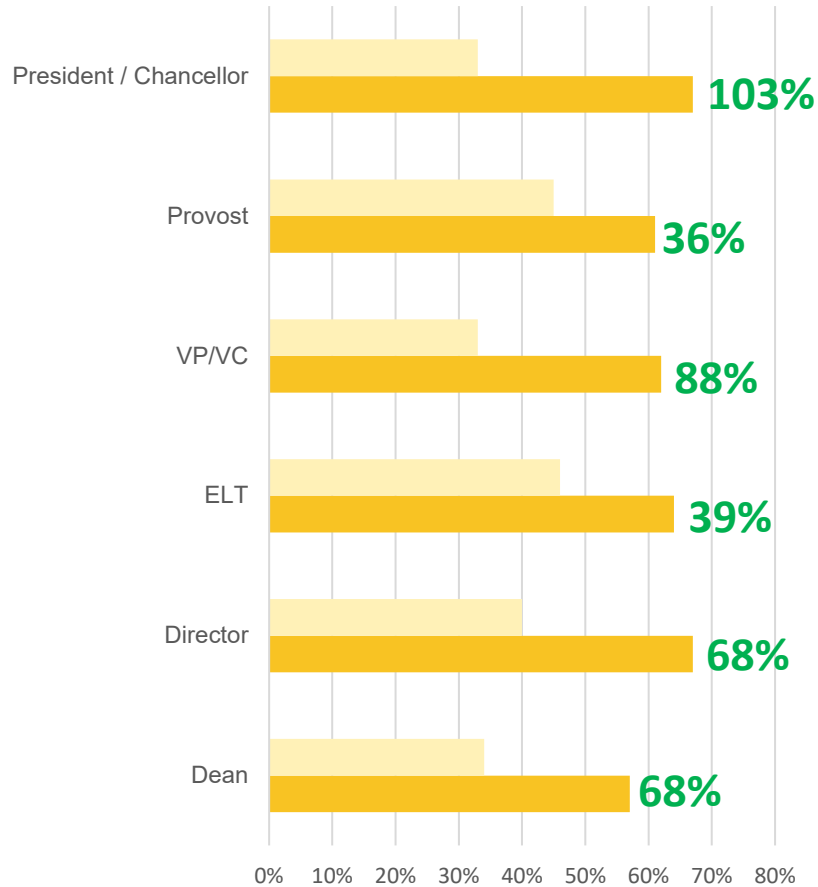
RESEARCH - mention the fact that UCF is a research university. This is more prominent for respondents that are deans or from the South. It is also correlated to higher familiarity scores.

9% **-1%**

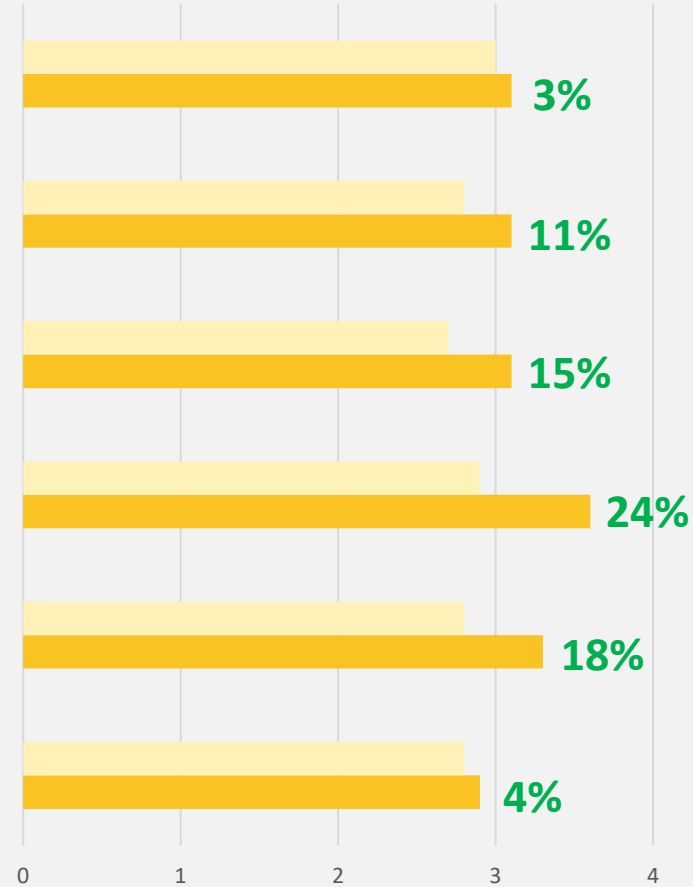
EXCELLENCE - use terms like excellent, great, outstanding and tremendous in describing their perceptions of aspects of UCF. Excellence overtook Football as the fourth highest attribute mentioned.

2022 vs 2023 BY GROUP

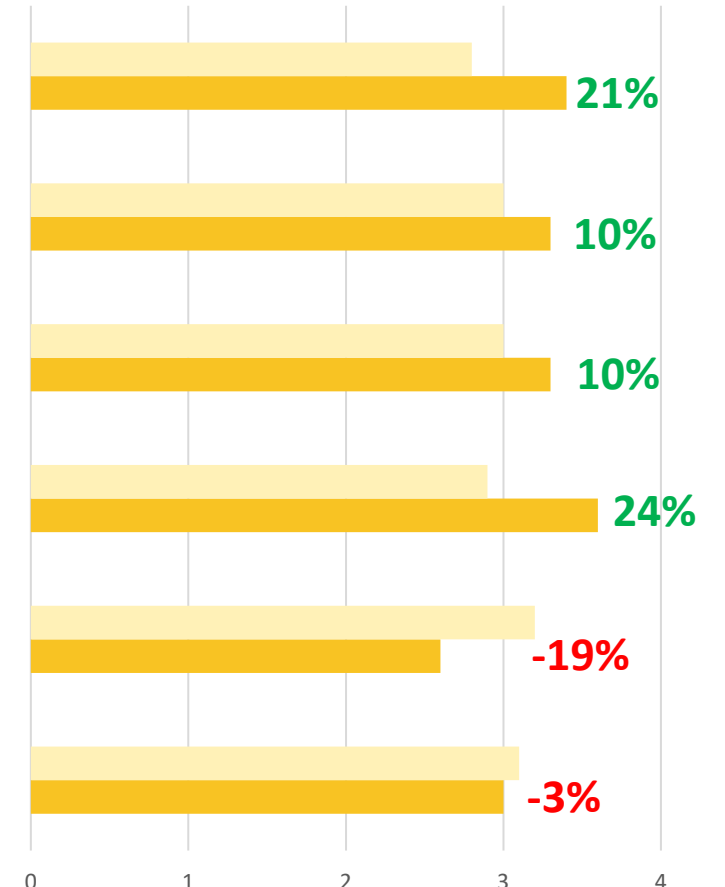
AWARENESS



FAMILIARITY



OPINION RATING





NEXT STEPS

- Continue to develop faculty and research excellence stories. Work with college communicators to identify and amplify excellence.
- Expand targeting of message to deans of specific disciplines (ex: Engineering, Computer Science, Nursing, Physics, Optics).
- Measure awareness, familiarity, rating with deans and other target groups using methodology established.



QUESTIONS?
