



Development Advisory Committee Minutes

January 11, 2022

4:00pm-5:00pm

Circulated:

Approved:

Present: Robert Ziff (Chair), Donald Freeman (SACUA Liaison), Thomas Baird (VP of Development), Todd Baily (Associate Vice President for Development), Paul Barrow, Ellen Bauerle, Karen Downing, Gintautas Grabauskas, Dorene Markel, Conor Neville, Meghan Sitar, Yaqing Zhang

Absent: Marilia Cascalho, Angelo Pitillo, Xin Tong

Guest: Sally Baker, Executive Director, Planned Giving

Chair Ziff called the meeting to order at 4:03pm.

Chair Ziff asked the committee members to introduce themselves to the guest speaker.

ODU Update

Tom Baird, Vice President for Development

VP Baird gave the committee a year-end overview of what OUD has accomplished across the university's 36 fundraising units.

VP Baird shared that OUD closed several gifts in December, and there was increased in-person donor engagement. Donors gave \$329 million in the second quarter that was a 165% increase from last year. OUD passed \$100 million in production. In fundraising terms, these are one-time gifts, new pledges and new planned gifts.

He shared that the gifts made were not by just one donor, but OUD received 16 different gifts that were \$5 million or above. VP Baird gave an example of a recent gift of \$7.6 million to support lung cancer research at Michigan Medicine.

He indicated that student support generates the most from donors and OUD received \$130-139 million in student support during that period. He shared that these outcomes have been generated by the continued efforts of the development community across 36 units. The development community has continued to really engage donors and informing them of the broad investment opportunities across campus.

Campaign Update

Todd Baily, Associate Vice President for Development

Associate Vice President Baily updated the committee on the campaign planning process and efforts by OUD.

He reminded the committee that they are approaching this campaign differently than



previous campaigns. He shared that their efforts are more collaborative with individual units, and they are discovering cross disciplinarily fundraising opportunities.

He shared with the committee that they have several working groups across campus around potential themes for the next campaign that was launched in September with work scheduled to be completed by May of 2022. The current themes are sustainability, health and wellness, democracy and civil society, the future of education and work, and living environments of tomorrow. The working groups were each charged to refine their theme and identify between one and three initiatives that the university could partner with donors to increase donor engagement.

Associate Vice President Baily shared that the scheduled completion of the working groups' efforts is scheduled for May, which will be when OUD will move into engaging donors in the further development of those themes. In the campaign planning processes there is high-level engagement with the campaign planning group which consist of a subset of deans and directors across campus that advise and work with OUD to build the campaign plan.

He shared with the committee that this month they will engage a market research firm to begin a broad stakeholder engagement process to identify the strengths of the University of Michigan brand. This second phase of the campaign process will take nine months.

Associate Vice President Baily stated that they have made progress in identifying and designing the volunteer structure for the next phase. OUD will work over the next several months to work with units and stakeholders to begin recruiting those volunteer groups to support the next campaign. He indicated that they are developing training sessions for development professional and academic leaders that have not participated in a campaign before.

He shared that the silent phase of the campaign was initiated on July 1 of 2021, and that the nucleus fund is on track to reach the 40-50% of the commitments and pledges to be reached before the launch of the public campaign effort. There currently have \$1.35 billion committed to the next campaign.

Faculty Planned Giving

Sally Baker, Executive Director, Planned Giving

Chair Ziff introduced Sally Baker, Executive Director of Planned Giving. Executive Director Baker introduced herself to the committee and gave an overview of Planned Giving and faculty planned giving.

Executive Director Baker shared with the committee how she works with donors to structure planned gifts that are beneficial for the donor and the University. She shared that during the last Victors for Michigan campaign, that \$5.28 billion was raised and that \$1.3 billion was generated from Planned Giving gifts. Of the total from Planned Giving, \$6 million was from faculty, staff and retirees.

Executive Director Baker asked the committee for feedback on the best ways to approach faculty about Planned Giving and if they have received marketing materials in the past informing faculty about the benefits for faculty in setting up a Planned Gift.



The committee members shared that they don't recall receiving this information in the past and that they would be interested in receiving further information. They asked who they should contact, their unit development officer or the planned giving office. They also suggested that a strategy for faculty engagement could be to show how the gift would benefit the faculty member's interest or how it would directly benefit their unit/school/college.

The committee also suggested creating workshops for faculty members, even for those in their 40's, to start thinking about Planned Giving and making faculty aware of these options early on. They also suggested perhaps having a centralized place or guide where faculty could refer to with questions or to set up an opportunity to discuss Planned Giving benefits for their area of interest and for the faculty member.

Executive Director Baker will provide her contact details to the committee to respond to any additional questions and the website where the committee could request more information. <https://plannedgiving.umich.edu/>

Faculty/Staff Campaign Volunteers

Conor Neville, Associate Director, Campaign Strategy and Initiatives

Associate Director Neville gave the committee an overview of the campaign volunteer structure. He gave some examples of various campaign volunteer groups, such as donors, undergraduate and graduate students and faculty, staff, and retirees.

He indicated based on the committee discussion that perhaps leveraging the volunteer group for faculty, staff, and retirees would be a way to discuss how to better engage/approach this group with a Planned Giving discussion.

Associate Director Neville indicated that he would like to consider the topic of the faculty, staff and volunteer structure at the next meeting. He would like the committee's opinion on how that structure would look, and whether it would be a unit liaison structure, a group of 10-15 people that were identified in making a difference, or leveraging the existing structure such as the Development Advisory Committee.

Meeting Adjourned at 4:51pm.

Respectfully submitted,

Elizabeth Devlin
Faculty Governance Coordinator
Faculty Senate Office