GREAT EXPECTATIONS
THE CAMPAIGN FOR MARYLAND

Campaign Plan:  Working Draft

April 2006
Campaign Plan

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I. Introduction

*Great Expectations:* The Campaign for Maryland is about teaching and discovery, about students and faculty. It is about transforming lives and making a difference. The campaign is about the future of the University of Maryland.

During the last ten years, Maryland has been the fastest rising university in the nation. Having achieved excellence, it now intends to move into the ranks of the great public research universities. Maryland’s progress and promise comes at a time of great change and challenge in higher education. Our success will depend increasingly on the broad involvement and support of alumni and friends.

The campaign is the linchpin to Maryland’s transformation from excellence to greatness. The campaign’s success will require a compelling vision for the university, able and dedicated leadership, and a professional and sophisticated fundraising program. The strategic and operating plan for the campaign is presented in the following pages.

II. *Great Expectations:* The Campaign for Maryland

A. Campaign Characteristics

- **Strategic**
  *The campaign is integral to the University’s strategic plan*

- **Inclusive**
  *The campaign “process” is inclusive and encourages broad participation and buy in. Although priorities will be clearly articulated, all gifts to the University will be considered part of the Campaign*

- **Comprehensive**
  *All schools, colleges, and programs will be part of the campaign and will establish their own goals and priorities in consultation with the President and Provost*

- **Core**
  *The fundraising emphasis will be on priorities, such as scholarships and faculty support, geared to enhancing the mission of the University*
B. Goals and Outcomes

- The University of Maryland will be among the nation’s great public research universities as judged by the quality of its students, faculty, programs, and facilities.

- The University will ensure “affordable access” by significantly reducing the unmet financial aid need of its students.

- The University will have a higher and more secure level of funding capable of sustaining excellence and maintaining access.

- The Maryland campaign will achieve all its benchmarks and will position the University for continued growth in philanthropic support and public recognition. Over the course of the campaign, the University will
  
  ✓ Achieve its campaign goal of $800 million or more.

  ✓ Through new gifts and market appreciation, build an endowment of at least $700 million.

  ✓ Build an annual donor base of at least 65,000 contributors.

  ✓ Celebrate the addition of “signature” facilities:
    - Jeong Kim Engineering Building
    - Samuel Riggs IV Alumni Center
    - Biosciences Research Building
    - Merrill School of Journalism Building
    - Van Munching Hall addition (Robert H. Smith School of Business)
    - Other projects awaiting State and Regents approval include:
      - Physical Sciences Complex
      - College of Education addition
      - The expansion of Byrd Stadium
C. Strategic Objectives

The *Great Expectations* campaign will help the University set the pace for the nation’s top public research universities in the twenty-first century. The campaign agenda will be comprehensive. All areas of the institution are expected to excel; all will require increased philanthropic support in order to succeed at the highest level.

While encompassing all parts of the institution, the campaign’s agenda is basic and concise. We seek to raise funds for:

*Great Students*

Enhancing learning and achievement by providing exceptional educational, cultural, athletic, and social experiences and ensuring affordable access for a community of diverse and talented students.

*Great Faculty*

Strengthening our ability to recruit and retain internationally distinguished faculty, leaders who have the capacity to transform lives through their research, instruction, and public service.

*Great Environment*

Supporting superior physical facilities, library resources, and technologies that enable the talents of students and faculty to grow and excel.

*Great Impact*

Supporting pioneering research and leadership in the arts and community engagement.

*Great Innovation*

Reinforcing a campus culture of initiative, innovation, and entrepreneurship that builds upon Maryland’s “unfair advantages” to advance teaching, research, and service.
The *Great Expectations* Campaign will encompass seven years, with a 27 month Silent Phase (July 1, 2004 – October 20, 2006) and nearly five year Public Phase.

### D. Campaign Timetable

<table>
<thead>
<tr>
<th>Defining Phase</th>
<th>Public Phase</th>
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<tbody>
<tr>
<td>Preparation</td>
<td>2/02—6/03</td>
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<tr>
<td>Planning</td>
<td>6/03—9/04</td>
</tr>
<tr>
<td>Leadership</td>
<td>9/04—6/06</td>
</tr>
<tr>
<td>Kick Off</td>
<td>7/06—12/07</td>
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<tr>
<td>Mid-course</td>
<td>1/08—12/09</td>
</tr>
<tr>
<td>Stretch</td>
<td>1/10—12/11</td>
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- **Scholarship Benefit**: 9/18/04
- **150th Anniversary Celebration**: 10/05 – 12/06
- **Campaign Kick-off Event**: 10/20/06
- **Market Study (Leadership Phase)**: 3/14 – 6/04
- **Campaign Goal Set**: 8/06
E. Volunteer Leadership

Board of Trustees

The University of Maryland College Park Foundation’s Board of Trustees is a highly prestigious and influential group dedicated to advancing the University to preeminence. The Board has enthusiastically accepted responsibility for the success of the Great Expectations campaign.

Campaign Co-Chairs of the Silent Phase and Public Phase

To ensure that the campaign has exemplary leadership, the UMCPF Board recruited two Co-Chairs to provide broad policy direction and fundraising power for the silent phase: A. James Clark ’50 and Robert H. Smith ’50.

Five co-chairs are being recruited to lead the campaign’s public phase. The co-chairs will...

- Lead the campaign by contributing pacesetting gifts of at least $1,000,000; setting overall campaign policy; advising on strategy; monitoring progress toward goals; recruiting other volunteer leaders; and assisting with key gift solicitations;

- Advise the President of the University on issues related to campaign management;

- Represent the campaign and University at key events and participate in campaign review meetings

The Campaign Council

To ensure that the Great Expectations campaign has broad-based working leadership representing key constituencies, the UMCPF Development Committee has voted to reconstitute itself as a Campaign Council of approximately 35 members. Council members will be donors at the $100,000+ level and will be chosen for their proven leadership and commitment to the University. It is expected that many Council members will be drawn from the ranks of fundraising committees affiliated with School, Colleges, Athletics and other units as well as regionally based fundraising committees. The Campaign Council will oversee fundraising operations; provide guidance on strategy, management, and policy issues; and assist with the solicitation of key gifts. The Council will work closely with volunteer boards and groups across the campus to ensure that the campaign is conducted effectively and efficiently and exemplifies the highest standards in every respect.

- Responsibilities of the Campaign Council include:

  - Overseeing campaign operations

  - Addressing management, policy, and strategy issues
• Advising and assisting the efforts of school, college and program advisory and fundraising volunteer groups

• Recruiting top fundraising volunteers

• Monitoring and evaluating the campaign’s performance

• Identifying, cultivating and soliciting support from key prospects

• Contributing exemplary gifts to the University

• Hosting and attending campaign and campaign-related events

The Campaign Council will meet three times each year in conjunction with Board of Trustee meetings. Council members will need to be available for individual meetings and telephone consultations.

National Volunteer Council

The National Volunteer Council (NVC) is vital to the success of the campaign. It will consist of a network of influential alumni and friends who connect us to prospective donors across the country and actively participate in the cultivation and solicitation of major and Colonnade-level gifts.

The NVC will be launched first in five primary regions: Baltimore, Florida, Washington DC, New York Metro, and the West/Southwest. Expansion of regions will evolve as markets mature and budget resources for additional staff become available. The structure of the group will include a NVC Chair, five Regional Chairs and a staff member to support each.

The NVC Chair and members are expected to contribute a major gift of at least $100,000 the University Program of their choice and make a Colonnade Society gift of at least $1,000 or more annually. In addition, they will:

• Assist with identification of regional volunteers
• Attend NVC meetings
• Identify alumni and friends capable of making gifts
• Assist in solicitation of donors by hosting small events, meetings, opening doors and when appropriate, personal solicitations
• Serve as advocates for the University
Other Fundraising Volunteer Groups

Volunteer leadership boards of all schools and colleges, and other key campus units (including the Libraries, Performing Arts and Athletics) will be mobilized in support of the campaign. Special volunteer leadership committees will be recruited for The Campaign for Scholarships and The Faculty/Staff Campaign. The Campaign Council will serve as the forum through which these efforts are assisted and coordinated.

The overall volunteer leadership organization is shown on page 8.

Once a year, all campaign volunteer leaders – the Board of Trustees, the Council, school, college, and program groups, and the National Campaign Committee – will convene to review the performance of the campaign and discuss and devise strategies and action steps for the next 12 months.
E. Volunteer Leadership

UNIVERSITY OF MARYLAND COLLEGE PARK FOUNDATION

Campaign Council
5 co-chairs
35 members

Leadership Gifts
Incentive Awards Program
Transfer Scholarships
Endowed & Current Use Scholarships

Leadership Gifts
Planned Gifts
Participation Gifts

Regional committees (National Council)

Baltimore
New York Metro
Florida
West/Southwest
DC
F. Staff Organization

During the last campaign and leading up to the Great Expectations campaign, the University’s fundraising staff has expanded and become highly professional and effective.

The nation’s great public research universities have large, talented, and experienced advancement staffs. We will continue to build up the development program and invest in excellent staff in order to support the volunteer leadership of the campaign and sustain a fundraising program of the highest standards.

The organization and deployment of staff will be guided by five primary objectives.

1. Focus intensely and creatively on the top tier of potential campaign donors: the “top 100” and all $1 million+ prospective donors

2. Strengthen and support the development efforts of the University’s schools, colleges, and programs

3. Build up our “central” fundraising capabilities to enhance school and college programs; broaden the donor base through the Maryland Fund for Excellence, the Colonnade Society, and other campus annual giving programs; and provide specialized expertise in areas such as gift planning and corporate and foundation relations.

4. Support university-wide priorities (e.g. scholarships, undergraduate education, University Libraries, performing arts, Riggs Alumni Center)

5. Provide marketing and “infrastructure” support (e.g. information systems, research, donor relations, special events, gift processing and acknowledgment; investment management) for the entire fundraising organization

During the past eighteen months, major steps have been taken to prepare for Great Expectations:

A highly experienced Campaign Director & Executive Director of Development has been brought on board to provide expert campaign management.

A Leadership Gifts group has been established to ensure that our relationship-building with the top tier of prospects is highly energetic, sophisticated, creative, and coordinated. A Senior Director has been hired to lead this important effort.

An Individual Gifts team has been assembled to focus on major gifts and work with the regional volunteer groups of the National Volunteer Council.
A National Volunteer Council (NVC), with committees in five regions across the country, is being developed. A major gifts (Individual Gifts) team of eight professional staff has been recruited to work with the NVC and extend our prospective outreach to campaign contributors.

A Scholarship Program, with three professional staff, has been established to spearhead and coordinate fundraising for the campaign’s top priority. The staff will manage a comprehensive effort, encompassing “high end” donors, major gifts prospects, and grassroots contributors, to help secure $200 million or more in new scholarship support.

More than a fourteen professional staff have been recruited to strengthen the fundraising programs in particular schools and colleges including new fulltime positions in the College of Health and Human Performance and the College of Information Studies.

Three talented professionals have been recruited to the Maryland Fund for Excellence (MFE) as part of the process of rebuilding the program, which was decimated by the budget cuts of 2002 and 2003. The MFE is key to broadening the donor base and expanding the number of Colonnade Society contributors.

Staff additions have also been made in Campaign Communications, Donor Relations, Research, Human Resources, and Financial Management.

It is essential to invest in staff development. Our Human Relations unit has been charged with the tasks of developing an ongoing staff-training program and improving our staff recruitment and hiring procedures.
G. Campaign Budget

Overview

The University of Maryland is well positioned for a breakthrough in fundraising. The last campaign, Bold Vision, Bright Future (FY1997-FY2002), secured $476 million in gifts against a goal of $350 million. Since then, annual fundraising dollar and donor totals have increased steadily. In FY2005, a record-setting amount, $121 million from more than 40,000 donors, was raised.

Just as the University has demonstrated it can fulfill its flagship mission and excel academically, it has proven that it can attract substantial philanthropic funding and build a broad base of support from alumni and friends.

But a flagship advancement program requires a parallel commitment of budgetary investment. Simply put, it takes money to make money. The University, faced with severe budget constraints and periodic cuts in state funding, has nevertheless increased support for its advancement (University Relations) program. However, there remains a gap between what is required to undertake an $800 million+ campaign and what is currently being provided.

The Campaign Budget

Over the seven year campaign period, a minimum of $129 million will be required to support University Relations, with 66% of that amount, or $86 million, devoted to fundraising and gift accounting and the balance allocated to alumni relations, marketing, and communications.

Spending $86 million to raise $800 million is too efficient. Even the most mature fundraising programs at the nation’s elite private universities would have a hard time matching this 10 cents-on-the – dollar ratio. Fundraising at large public universities is inherently more expensive, typically in the .12 to .14 range, and a greater investment is required in young programs, such as Maryland’s, where catching up in the development of a fundraising infrastructure is essential. At Maryland, given the rapidly maturing but still nascent condition of its development program, an investment of .14 to .16 per dollar raised would be consistent with industry standards.

We can, must, and will be more efficient than the industry standard. We can, must, and will be more innovative and effective. Nevertheless, we are not yet adequately budgeted for the Great Expectations campaign.

As the budget spreadsheet on page 13 indicates, the gap between the lean advancement budget of $129 million and what has been committed is $7 million, or an average $1 million a year. This gap would have been much larger, fatally larger, had not the University administration and deans stepped forward during difficult budget times to allocate more than $25 million in budget support for the campaign.
Unless the remaining budget gap is closed, we will sacrifice mid- and long-term measures vital to broadening and sustaining our fundraising capabilities. In essence, we will focus on near term opportunities, particularly the pursuit of large gifts, while drastically under funding basic major gifts work, the annual fund, and infrastructure (e.g., database management, information systems, research, donor stewardship and donor relations).

During FY2006, as we head toward the campaign kick-off, we will explore any and all ways to close this $7 million gap. The University System of Maryland request for special state funding for the campaigns of all System institutions, was successful but the manner by which the support was allocated resulted in no net additional funding for *Great Expectations*. College Park received 15% of the Governor’s special appropriation, or $566,500, and the university needed to use that funding to backstop its existing commitment of $800,000 in new base budget support (augmenting increases made in FY05 and FY06).

The adequacy of our campaign budget and the deployment of available resources will be rigorously evaluated in the spring of 2006. The outcome of this assessment will be a key factor in setting the actual public goal for the campaign. Unless the $7 million gap is closed, the difference in actual versus potential goal could vary by $50 million to $100 million.
### Great Expectations Campaign: Projected Budget

(all amounts in millions)

<table>
<thead>
<tr>
<th></th>
<th>FY05 Proj</th>
<th>FY06 Proj</th>
<th>FY07 Proj</th>
<th>FY08 Proj</th>
<th>FY09 Proj</th>
<th>FY10 Proj</th>
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<td>$14.32</td>
<td>$15.20</td>
<td>$16.45</td>
<td>$96.72</td>
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**Added Items:**

- **University (base budget)**: $0.80, $1.40, $2.00, $2.20, $2.30, $2.40, $2.50, $13.60
- **President's Budget**: $1.20, $0.40, $1.60
- **Gifts**: $0.14, $0.14, $0.14, $0.14, $0.14, $0.14, $0.84
- **Common Trust**: $0.00, $0.00, $0.00, $0.00, $0.00, $0.00, $0.00, $0.00
- **Deans cost sharing**: $0.00, $0.10, $0.15, $0.15, $0.15, $0.20, $0.20, $0.95
- **Gift Fees**: $0.00, $1.16, $1.23, $1.26, $1.54, $1.62, $2.00, $8.81
  - Reduce Holdback on Oper Funds: 4.0%, 4.0%, 3.8%, 3.8%, 3.8%, 3.8%, 3.8%, 3.8%
  - Reduce Fee on Endowments: 1.6%, 1.5%, 1.5%, 1.4%, 1.4%, 1.3%, 1.3%
- **Annual (Deficit)/Surplus**: ($0.09), ($0.76), ($1.21), ($1.35), ($1.28), ($1.37), ($0.74), ($6.80)
- **Cumulative (Deficit)/Surplus**: ($0.09), ($0.85), ($2.05), ($3.40), ($4.68), ($6.05), ($6.80)

*Note: Includes Year-End Call of $290,000 annually from Dr. Destler from FY05 through FY11. Also includes AV Williams funding of $300,000 annually from FY05 through FY08, reducing to $200,000 in FY09 and zero for FY10 through FY11.*
H. Setting the Goal

A process for the University overall and each school, college, and program

- Vision & Priorities
  - Campaign Plan & Budget
  - Leadership & Staffing
- Silent Phase
  - Set Campaign Goal
    - August 2006

- Market Study
  - Double Productivity
  - Prospect Analysis/Capacity
H. Setting the Goal

The campaign will pursue a “stretch” dollar goal, a goal that is as ambitious but reachable with supreme effort. The goal will be determined through a seven step process. This process will be applied to each school, college, and program as well as to the overall campaign.

1. Priorities

Based on the University’s strategic plan, funding priorities will be identified and articulated. Typically, funding needs exceed fundraising capacity by a factor of two or more, so campus leaders will rigorously par down the “wish lists” to objectives that will make the greatest difference to academic quality, student success, and institutional vitality.

2. Double Productivity

A double productivity calculation is a “rule of thumb” in campaigns. We take the average annual fundraising results over the last five years and double that for the number of years of the new campaign. Such a calculation suggests a possible campaign goal of $840 million.

Another version of double productivity is to project 10% annual growth during the seven years of the campaign. That calculation would suggest a possible goal of $783 million.

3. Market Study

Calculations are useful guides. More valuable is the feedback gathered through interviews with prospective donors. Between February and July, 2004, University Relations staff conducted 250 personal interviews and several focus groups. The findings were highly informative. The interview questions and a summary of the findings are provided in the Campaign Documents Section (DHS – A). The most salient findings are noted below:

- 76% of the major prospects interviewed indicated they felt connected to the University and characterized their relationship with the institution as positive. More than a third cited a personal relationship as having stimulated their connection, or reconnection, to the University.

- 45% of the respondents felt an affinity for the “University as a whole,” while 78% cited a significant affiliation with a particular school, college, or program or a combination of a part and the whole.

- A large majority, 89%, have visited campus in the last year.
• 85% feel that the University had improved substantially over the last ten years. 51% rate Maryland’s academic quality as high and 46% as good. 99% would recommend Maryland to prospective students.

• More than three quarters of the respondents, 79%, endorsed scholarships as a top priority for the campaign. Support for faculty and facilities also rated highly.

• Fewer than half, 44%, considered the University to be among their top three philanthropic priorities. Of those asked, 42% indicated they had given a gift of $50,000 to some charitable organization and most expressed a willingness to consider such a gift for Maryland.

• 48% of those asked indicated a willingness to be solicited for a campaign gift in the next 6 to 12 months.

In brief, the University has done well in recent years in connecting with alumni and friends and in enhancing their awareness of and pride in Maryland’s achievements and rising academic stature. Clearly, however, more work remains to be done in promoting a philanthropic culture and encouraging prospective donors to place Maryland high on their giving agenda.

The Great Expectations campaign will have a transforming impact on the philanthropic culture of the Maryland family. The campaign will raise giving sights and stimulate broad participation as it seeks and secures investments in academic quality and affordable access.

4. Prospect Analysis

Calculations and surveys will be for naught unless one has a sufficient number of identified and evaluated prospective donors for a projected campaign goal. Hence, the University Relations staff undertook a thorough analysis of both the quality and quantity of prospective donors in the context of standard gift tables.

This analysis suggested a planning goal of $800 million.

5. Silent Phase

The Silent Phase is crucial test. During this period, one solicits gift commitments from many of the University’s closest and most supportive friends. The actual responses compared to expectations largely determine whether the planning goal is sound or needs to be adjusted, upward or downward.

During the silent phase, at least 35% of the planning goal should be secured, if the planning goal is to be the declared public goal.
6. Priorities, Campaign Budget, Campaign Readiness

The penultimate step is an assessment of campaign readiness. Priorities will be fine-tuned, and the state of campaign operations will be evaluated. Of vital importance is the campaign budget and whether the available resources are in line with the fundraising agenda and expectations of the campaign.

7. Public Goal (September 2006)

At the Board of Trustees meeting in June 2006, the proposed public goal for the Great Expectations campaign will be discussed. The co-chairs will be delegated responsibility for determining the declared public goal not later than September 6, 2006, one month prior to kick-off.
### I. Gift Pyramid for a Planning Goal of $800 million

<table>
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<tr>
<th>Gift Size</th>
<th>Number of Prospects Needed</th>
<th>Number of Gifts</th>
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<td><strong>Total</strong></td>
<td><strong>15,270</strong></td>
<td><strong>3,054</strong></td>
<td><strong>$800M</strong></td>
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</table>
J. Campaign Communications: Guiding Principles

Campaign communications will be guided by the following principles:

**A Unified Look.** There will be an overarching identity for the family of campaign materials, which will include a name and design. “The look” will complement the University identity system and complement communications designed for the 150th Anniversary celebration.

**Core Messages.** Strategic messages, based on the results of the Campaign Marketing Study, will be incorporated in all communications. Core messages will be consistent with the University’s brand values of *quality, momentum, discovery,* and *impact.*

**Flexible Formats.** Materials will leverage the look, core messages, and broad campaign goal, but allow for customization and flexible use by all parts of the University.

**Different Phases, Different Formats.** Different phases of the campaign may emphasize or require particular formats, media, and messages.

**Segmenting Audiences.** Different types of donors may respond to different proposals, messages and formats. We will cull out the key differences, based on demographic information, and use those in development of campaign communications. Training for UR staff in key demographic differences will be provided.

**Cost Sharing.** University Relations will cover the cost of all University-wide campaign materials and the core pieces for each school, college, and program. To the extent possible, University Relations will share in the funding of specialized pieces developed by the schools, colleges, and programs.
Communications Timeline and Priorities

Silent Phase – July 2004 to September 2004
1. Create campaign identity
2. Develop core messages
3. Produce and send executive summary of market study to all participants
4. Establish priorities for silent phase need
5. Establish expectations for announcing or holding lead gifts

Silent Phase – September 2004 to November 2004
1. Gather and incorporate input from administrative leaders, volunteers, trustees, and staff
2. Meet with deans and development officers to assess needs and schedule priorities
3. Create materials including proposal covers, folder, case statements

Silent Phase – December 2004 to June 2005
1. Coordinate launch expectations with USM plans and timing
2. Set budget and priorities for public launch phase
3. Coordinate silent phase priorities with 150th Anniversary planning
4. Design and produce all donor relations material
5. Design and update campaign web materials

Silent Phase – July 2005 to October 2006
1. Develop mass and public kickoff strategies
2. Plan media strategies for public announcement
3. Leverage 150th Anniversary events for leadership phase strategies
4. Produce public phase materials for University and units
5. Plan for campaign launch in existing University vehicles

Public Launch – October 2006 to June 2007
1. Plan and implement kickoff events.
2. Produce mass communications vehicles (newsletters, honor roll, unit-focused pieces)

Mid Campaign Phase – July 2007 to June 2009
1. Focus on goals reached and value created by gifts in publications and media
2. Highlight unique gifts in publications and media
3. Adjust expectations as necessary and begin to highlight targets for success

Closing Phase – July 2009 to June 2011
1. Highlight achievements
2. Celebrate milestones: dollar and programmatic goals
3. Plan and execute closing events and media strategies
4. Compare position in 2011 with that of 2004
5. Balance claims of success with need for continued support

Post Campaign Phase – July 2011 to October 2011
1. Communicate analysis of outcomes to all donors, volunteers, trustees, and campus community
Post Campaign Phase – July 2011 to October 2011

1. Communicate analysis of outcomes to all donors, volunteers, trustees, and campus community

**Campaign Communications: Publications**

A number of new publications will be created especially for the Great Expectations Campaign. These will include:

- A University-wide *case statement* to announce the purposes, rationale and priorities for the Campaign
- *Case statements* for individual school, colleges and other units that have specific campaign goals
- *Prospectuses* for key projects and priorities (for example, Scholarships, the Physical Sciences Building)
- A *campaign newsletter* for donors, potential donors and volunteers that highlights gifts, donors, giving opportunities, and events
- Campaign *webpages*.

In addition, existing University publications will be adapted for campaign use including:

- The University *Website*. Campaign themes, messages and stories will be integrated into the website which receives 1,000,000 hits per month.
- *Terp Magazine*. *Terp* will cover campaign news and stories related to campaign priorities and messages. Each year, 445,000 magazines are mailed to alumni and friends.
- *Terp Alumni Network*.
- *Outlook*.
- *Vision*
- *School and College newsletters and magazines.*
K. Engaging Prospective Major Donors

Philanthropy is democratic but not egalitarian. Most of the dollars are contributed by a fraction of the donors. We estimate that more than 90% of the projected $800 million goal will be generated by 700 donors, less than 1% of the projected number of campaign donors.

While we constantly strive to broaden our base of annual contributors – and have increased that base from 27,000 to 41,000 during the last five years – the success of the Maryland campaign will depend on a relatively small number of donors.

What leads a person to contribute $100,000, $1,000,000, or $10,000,000 to the University of Maryland? Financial capacity is a pre-condition, of course. Many other factors may play a role, but there are three essential conditions: the donor must feel a bond with the University, possess a passion for the institution as a whole or some particular program or activity, and have a clear understanding how his or her gift will make a strategic difference. In some way, each major gift must have transforming effect, whether on the life of a particular student at a particular time, on education or research that touches many lives, or on the University’s capacity to thrive and fulfill its mission.

Pride in Maryland is growing day-by-day, in sync with our rising academic stature, our new luster in the arts, and our success on the playing field and court. We will capitalize on this growing pride and interest by reaching out to prospective donors in personalized and customized ways. Through creative outreach, we will build and sustain relationships with prospective donors. We will help more alumni and friends understand the value of Maryland and how they can make a difference in its quality and impact.

Relationships are established through personal contact. We must get to know prospective donors, understand their needs and interests, engage them in the life of the University, and enhance their understanding of how they can help shape Maryland’s future. Key engagement strategies include the following:

<table>
<thead>
<tr>
<th>Engagement Activity</th>
<th>Number of Prospect Contacts (annually)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal visits</td>
<td>current 2,600, goal 4,000</td>
</tr>
<tr>
<td>by volunteers, University officials, development staff</td>
<td></td>
</tr>
<tr>
<td>Participation on a Board</td>
<td>current 350, goal 450</td>
</tr>
<tr>
<td>Foundation/school/program</td>
<td></td>
</tr>
<tr>
<td>Volunteer Roles</td>
<td>current 100, goal 400</td>
</tr>
<tr>
<td>mentor, campus speaker, event host, etc.</td>
<td></td>
</tr>
<tr>
<td>President’s Advisory Council</td>
<td>current 60, goal 75</td>
</tr>
<tr>
<td>DC, Baltimore, NY, SF, FL</td>
<td></td>
</tr>
<tr>
<td>Task Groups</td>
<td>current 60, goal 300</td>
</tr>
<tr>
<td>focus groups, prospect screenings, etc.</td>
<td></td>
</tr>
<tr>
<td>President’s/University VIP Events</td>
<td>est. 2,000, goal 3,000</td>
</tr>
</tbody>
</table>


L. Stewardship and Donor Relations

Throughout the campaign and beyond, we will be diligent and energetic in our efforts to ensure that all donors gain satisfaction and pleasure from their philanthropic support of the University.

It is inherently important to keep donors informed and involved. Donors are philanthropic investors in the future of Maryland. We are determined to steward their support effectively and report on the “dividends” made possible by their investments.

Philanthropy is a people business. Most of our stewardship and donor relations will be conducted through personal communications and contact, but our success will depend on having a sound program in place to guide our activity.

Our stewardship and donor relations consist of the following:

- **Gift Acknowledgement**

  Currently more than 40,000 individuals and organizations contribute to the University of Maryland annually, and we expect to reach the 65,000 level before the end of the campaign. All gifts will be promptly receipted, and we have a thank you letter procedure to ensure appropriate and personal acknowledgement.

- **Donor Recognition**

  We will continue to enhance the activities, events, and communications of our giving societies.

  The **Colonnade Society** recognizes all annual donors of gifts of $1,000 or more. During the campaign we will strengthen the “brand” identity of the Colonnade Society and broaden its activities. The Colonnade is the starting point for significant giving to the University, and it must be a highly visible and valued donor recognition society. We actively seek to encourage collaboration between the Colonnade Society and unit giving clubs.

  The **Maryland Society** stewards donors for exceptional lifetime giving. The Society’s four levels recognize donors at the $100,000, $250,000, $500,000, and $1,000,000 levels. All Maryland Society members will receive personalized stewardship multiple times each year.

  The **Founders Society** acknowledges and thanks individuals who have named the University of Maryland as a beneficiary in their will. During the Great Expectation campaign, we intend to double the Society’s membership and make the Society a central feature in our stewardship of legacy donors.
• Reports and Publications

We will keep our donors informed about the importance and positive impact of philanthropic support of the University of Maryland generally and the impact of their own gifts specifically. Key communications pieces include:

**Vision**, our donor newsletter, will report on the progress of *Great Expectations* and highlight donors and how specific gifts have made a difference at Maryland. Vision will be published three times each year. The fall issue will include the donor honor roll, which recognizes all donors who have contributed $1,000 and more during the previous year.

The **Scholarship Website** is trailblazing initiative by the University. Recently launched, the website will be a complete repository for information on all scholarship endowments and many current-use scholarship accounts. Background on donors and the students who are scholarships recipients will be included. Donors from Baltimore to Singapore will be able to check in on their scholarship funds, connect electronically with scholarship recipients, and keep informed about the market value and income flow of their accounts.

**Terp**, the University’s and Alumni Associations magazine that reaches 190,000 alumni, will be an important vehicle for communicating about the campaign to a broad-based audience.

Virtually all schools and colleges publish newsletters and magazines, including Engineering’s *E & M, Smith Business*, Journalism’s *Deadline*, and Education’s *Endeavors*. On a regular basis all will highlight donors and the benefits of gifts.

• Announcement Events, Dedications, and Media Releases

For gifts that are especially significant due to their magnitude and/or distinctive purpose, we will arrange for special announcement ceremonies. These will range from large scale, media-oriented events, such as the January 2005 announcement of the $30 million gifts by A. James Clark and Robert H. Smith, to dinners at the President’s Residence.

We will use milestones, such as the dedication of new building and the reaching key campaign benchmarks, to thank donors and emphasis the value and importance of philanthropy.

• Personal Visits and Small Events

Nothing substitutes for personal contact with donors. Volunteers, campus leaders, faculty, staff, and students will be engaged to meet with donors to review and report on the impact of the gifts of the donors.
M. Research and Information Systems

Relationship-building is fundamental to fundraising. During the campaign, literally hundreds of volunteers, staff, and University administrators and faculty will be engaged in outreach to tens of thousands of alumni and friends. There is no substitute for personal contact.

And, there is no substitute for informed personal contact. Gathering and managing publicly available information on our 240,000 alumni and friends is vital to the relationship-building process. Without knowing where and how to focus our human resources and without preparing our volunteers and staff with the best available information, fundraising would be an exercise in finding the proverbial needle in a haystack.

During the last six years, we have improved our research and information systems dramatically. Thanks to a small but very talented and dedicated staff, we have “found” more than 20,000 alumni, filled out our database with information on degrees, extracurricular activity, and biographical information, and increased the number of identified major prospects from 500 to 9,000.

During the Great Expectations campaign, we will strive to invest in research and information systems in order to continue to improve our fundraising infrastructure for long-term success and to achieve the following specific goals:

- The number of identified major prospects will be increased from the current level of 9,800 at the rate of at least 5% annually: 10,500 by June 2006; 11,250 by June 2007; 12,000 by June 2008; 12,800 by June 2009; and 14,000 by June 2010.

- Both the quantity and quality of information on alumni and friends will be expanded significantly. Most importantly, we will acquire business and employment-related information on 50% of all assigned (major and non-major) prospects by June 2006, 65% by June 2007; 75% by June 2008; 82% by June 2009; and 90% by June 2010.

- All development officers will maintain their prospect tracking records on the central BSR database. This tracking is a vital tool for fundraisers, for ensuring coordinated outreach, and for performance evaluation. At all times, the right hand must know what the left is doing.

- More information and reports will be directly accessible to staff on their desktop computers. Currently, a significant number of information requests by staff, for their use and in support of volunteers, can only be fulfilled through manual research or labor-intensive computer programming. Much of this will be automated, enabling staff to quickly and efficiently find the information they need in real time, while freeing the research staff to focus on more sophisticated, value-added tasks.
• University Relations has pioneered the development of a scholarship website that enables donors to access information about their gift accounts and the students benefiting from their scholarships. This is a major step forward in donor relations. By June 2007, we will have available information on all endowments and major current use accounts and student recipients on-line, and a substantial amount of historical data will also have been recorded.

• The Research Office will develop predictive models to be used by development staff for identifying prospective donors most likely to be inclined to support the University. This will be especially useful to staff whose primary role is to make “discovery” calls.

• Endowment reports, providing pertinent financial information, are sent annually to donors. Continuous improvements will be made to these reports, and by FY2008 donors will be able to access detailed financial and programmatic information electronically, similar to the way individuals can go on-line to check their private investment portfolios.
N. The Office of Financial Affairs/UMCP Foundation

The Campaign will bring greatly increased demands on the Office of Financial Affairs. The primary campaign function of this office is to provide accurate and timely project activity and financial reports including reports on endowments operating funds, pledges receivable and other information essential for sound financial management and donor stewardship. (The best stewardship for donors is to demonstrate that their gifts are used to accomplish the intended purpose.) During the course of the Campaign, we estimate that almost 2400 major gifts and pledges will be received out of a total of approximately 350,000 gifts to the University. Not only must the Office be prepared for a much greater number of gifts, but it will also work for continued improvement in the quality of information it provides University colleagues and donors. Initiatives include:

- New project activity report.
- Combined cost, market value, and spendable income reports.
- Refined endowment donor reports.
- Continued budget management services.

In addition, the UMCP Foundation derives income from charges for its services and assessments on certain kinds of gifts and funds. A review is underway to identify new income streams that reduce the assessments made on gift income.

Information Services

The Information Services Office maintains the database of all alumni and donors to the University. It also generates management reports for schools, colleges, and other units and for the leadership of the Campaign. It provides access to the BSR database and training for staff. Campaign priorities for this office include:

- Providing more ‘desktop’ reporting capabilities to staff.
- Creating new reports that monitor progress in meeting campaign financial goals.
- Developing tools and systems for improved efficiency and prospect management.

Gift Acceptance

The Gift Acceptance staff processes and enters all new gifts, pledges and pledge payments into the database. As noted above, we expect 350,000 gifts during the
campaign. Many of these events will require multiple transactions as pledge payments are made and processed. An explicit goal of the campaign is to increase the number of donors from 40,000/year to 65,000/year. To meet these challenges the Gift Acceptance Office will:

- Provide ongoing training to Development staff.
- Add additional gift processing staff.
- Streamlining processes and procedures.

**Human Resources**

As noted early in this document, the campaign will require increased staffing to meet its goals. New positions are being created in the units as well as in the central University Development Office. It is also true that, as universities and other not-for-profits focus more and more on philanthropy, there is a corresponding increase in the demand for seasoned fundraisers that has put upward pressure on salaries and created a ‘sellers market’ for development professionals. The national average stay for fundraisers in a position is now less than three years. Applying this to Maryland’s current staffing levels would suggest that we would need to hire approximately 20 staff each year just to replace turnover. The burden created by this would be enormous. Each time an experienced person leaves, we lose time, institutional memory and most importantly the relationships we have with donors are disrupted and set back. Therefore the main goal of the Human Resources staff in the campaign will be to:

- Streamline and enhance the hiring and ‘intake’ process for new employees.
- Continue to place greater emphasis on marketing to and recruitment of new employees. Explore feasibility of hiring a recruiter for the Division.
- Develop and implement a Division-wide new employee orientation program.
O. The Silent Phase: Action Steps FY 2006

We will use the success and momentum of the past year to achieve even greater results. Our key tasks during the next twelve months…

- Raise at least $60 million more in campaign commitments to reach or exceed the $300 million Silent Phase goal *(As of April 11, 2006, the campaign total stands at approximately $240,000,000)*.

- Recruit 2 more Co-chairs, in addition to John Brophy, Alma Gildenhorn, and Bill Mayer, for the Public Phase of the campaign.

- Prepare the co-chairs of the Scholarship component of the campaign (Connie Chung, Buno Pati, and Gary Williams) for their role in the public phase.

- Conduct 3,000 visits with major prospective donors *(1,900 major prospect visits had been conducted as of the end of February)*.

- Recruit at least eight members to the Campaign Council, the volunteer leadership group responsible for campaign strategy and operations.

- Implement the major gifts national program with eight development officers and a regional network of volunteers *(Mark Turner has agreed to chair this network – the National Volunteer Council)*.

- Increase the number of rated major prospects to 9,000 *(As of April 2006, there are 9884 identified major prospects)*.

- Fill the following senior development positions: Director; Director of Development, College of Information Systems; Director of Gift Planning; Senior Director, Director of Development, College of Agricultural and Natural Resources *(Among the positions filled this year are: Senior Director, Leadership Gifts; Associate Campaign Director; Senior Director of Development, BSOS; and Senior and Associate Directors for Development for Scholarships)*.

- Continue the University’s 150th Anniversary Celebration

- Complete campaign plans for all schools, colleges, and programs

- Complete campaign publications and promotional materials
III. Appendices

A. Timetable and Action Steps

January 2004 June

Campaign planning and communications
• Campaign Plan full draft (5/04)
• Market Study leadership phase (6/04)
• Campaign policies
  Prospect management (3/04)
  Named gift levels (4/04)
  Communications (5/04)
  Counting standards (6/04)
• Staffing and budget plan (5/04)
• School readiness audit, 1st phase (6/04)

Campaign leadership
• Recruit chair of executive committee (4/04)
• Identify campaign co-chair candidates (4/04)

Leadership gifts
• Plan (4/04)
• Pre silent phase gifts of $10M (6/04)

Signature events
• Scholarship Benefit
  Sponsors secured (5/04)
  600 invites secured (6/04)

Major prospect events
• President's Advisory Council
  NY, LA meetings (5/04)

Prospect research
• Six screening sessions (6/04)
• Target of 7,200 major prospects (5/04)

July 2004 December

Campaign planning and communications
• Campaign Plan update (11/04)
• Market Study 2nd phase (11/04)
• Campaign policies & procedures
  Reports and reporting plan (11/04)
  School readiness audit, 2nd phase (12/04)
  School campaign plans (12/04)

Campaign leadership
• Foundation board planning session (10/04)
• Recruit campaign co-chairs (12/04)
• Deans solicitation training (12/04)

Leadership gifts
• Complete strategies (7/04)
• Six solicitations (12/04)
• Lead gifts target of $50M (12/04)

Signature events
• Scholarship Benefit (9/18/04)
  800 invites secured (9/1/04)

Major prospect events
• President's Advisory Council
  NY, SF, DC, Baltimore meetings (11/04)
• University Advisory Council
  Philadelphia, Chicago, Northern NJ meetings (12/04)

Prospect research
• Six screening sessions (12/04)
• Target of 7,500 major prospects (12/04)
• Upgrade 300 major prospects (12/04)
# A. Timetable and Action Steps (continued)

## January 2005 to June 2005

<table>
<thead>
<tr>
<th>Campaign planning and communications</th>
<th>• Campaign Plan final draft (5/05)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership gifts</td>
<td>• Lead gifts target of $130M (6/05)</td>
</tr>
<tr>
<td>Signature events</td>
<td>• Alumni Hall of Fame (6/05)</td>
</tr>
<tr>
<td>Major Prospect events</td>
<td>• President’s Advisory Council NY, SF, DC, Baltimore meetings (5/05)</td>
</tr>
<tr>
<td>Prospect Research</td>
<td>• Target of 7,800 major prospects (5/05)</td>
</tr>
<tr>
<td></td>
<td>• Upgrade 600 major prospects (6/05)</td>
</tr>
</tbody>
</table>

## July 2005 to December 2005

<table>
<thead>
<tr>
<th>Campaign planning and communications</th>
<th>• Campaign plan finalized (9/05)</th>
</tr>
</thead>
<tbody>
<tr>
<td>School campaign plans finalized (10/05)</td>
<td>• Core campaign materials (12/05)</td>
</tr>
<tr>
<td>Campaign leadership</td>
<td>• Silent phase leadership meeting (10/05)</td>
</tr>
<tr>
<td></td>
<td>• Recruit six members of the Campaign Council</td>
</tr>
<tr>
<td>Leadership gifts</td>
<td>• Lead gifts target of $160M (9/05)</td>
</tr>
<tr>
<td>Signature events</td>
<td>• 150th Anniversary kick-off (9/05)</td>
</tr>
<tr>
<td>Major prospect events</td>
<td>• President’s Advisory Council NY, LA, SF, DC, Baltimore meetings (12/05)</td>
</tr>
<tr>
<td>Prospect Research</td>
<td>• Target of 9,000 major prospects (12/05)</td>
</tr>
<tr>
<td></td>
<td>• Upgrade 400 major prospects (12/05)</td>
</tr>
</tbody>
</table>

## January 2006 to June 2006

<table>
<thead>
<tr>
<th>Campaign planning and communications</th>
<th>• Unit and specialized campaign materials (6/06)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign leadership</td>
<td>• Campaign leadership meeting (6/06)</td>
</tr>
<tr>
<td>Leadership gifts</td>
<td>• Lead gifts target of $275M (6/06)</td>
</tr>
<tr>
<td>Signature events</td>
<td>• Maryland Day/150th Anniversary (4/06)</td>
</tr>
<tr>
<td></td>
<td>• Inside Maryland (4/06)</td>
</tr>
<tr>
<td>Major Prospect events</td>
<td>• President’s Advisory Council NY, LA, SF, DC, Baltimore meetings (6/06)</td>
</tr>
<tr>
<td>Prospect Research</td>
<td>• Upgrade 400 major prospects (6/06)</td>
</tr>
<tr>
<td></td>
<td>• Electronic screening program (606)</td>
</tr>
</tbody>
</table>

## July 2006 to December 2006

| Goal setting                          | • Establish unit goals (7/06) |
| Campaign planning and communications | • Kick-off promotion and publicity (10/06) |
| Campaign leadership                   | • Campaign leadership meeting (10/06) |
| Leadership gifts                      | • Campaign Kick-off $ total of $300M (9/06) |
| Signature events                      | • Campaign Kick-off (10/20/06) |
| Major prospect events                 | • Regional kick-offs New York, SF (12/06) |
| Prospect Research                     | • Electronic screening data assessment (12/06) |
|                                     | • Upgrade 500 major prospects (12/06) |
## B. Campaign Gift Counting

<table>
<thead>
<tr>
<th>GIFT</th>
<th>UMCP PUBLIC COUNT</th>
<th>REGENTS COUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Payments (non-pledge)</td>
<td>full amount</td>
<td>full amount</td>
</tr>
<tr>
<td>Written Pledges</td>
<td>full amount</td>
<td>first five years</td>
</tr>
<tr>
<td>Oral Pledges (telethon/phonathon)</td>
<td>full amount</td>
<td>full amount</td>
</tr>
<tr>
<td>Other Oral Pledges</td>
<td>none</td>
<td>none</td>
</tr>
<tr>
<td>Marketable Securities</td>
<td>mean market value</td>
<td>mean market value</td>
</tr>
<tr>
<td></td>
<td>on date of receipt</td>
<td>on date of receipt</td>
</tr>
<tr>
<td>Closely Held Securities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$10,000 or less</td>
<td>per share purchase price</td>
<td>per share purchase price</td>
</tr>
<tr>
<td></td>
<td>most recent transaction</td>
<td>most recent transaction</td>
</tr>
<tr>
<td>Over $10,000</td>
<td>FMV by independent</td>
<td>FMV by independent</td>
</tr>
<tr>
<td></td>
<td>appraiser as required by IRS</td>
<td>appraiser as required by IRS</td>
</tr>
<tr>
<td>Property</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $5,000</td>
<td>FMV established by donor</td>
<td>FMV established by donor</td>
</tr>
<tr>
<td>$5,000 or greater</td>
<td>FMV est. by qualified</td>
<td>FMV est. by qualified</td>
</tr>
<tr>
<td></td>
<td>independent appraiser</td>
<td>independent appraiser</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institution as irrevocable bene.</td>
<td>Face Value of Trust</td>
<td>Report face value and amt</td>
</tr>
<tr>
<td></td>
<td></td>
<td>allowable as deduction</td>
</tr>
<tr>
<td>Revocable</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SEE REVOCABLE GIFTS</td>
<td></td>
</tr>
<tr>
<td>Charitable Gift Annuities</td>
<td>Face Value</td>
<td>Report face value and amt</td>
</tr>
<tr>
<td></td>
<td></td>
<td>allowable as deduction</td>
</tr>
<tr>
<td>Remainder Interest in a Residence</td>
<td>Face Value</td>
<td>Report face value and amt</td>
</tr>
</tbody>
</table>
### B. Campaign Gift Counting (continued)

<table>
<thead>
<tr>
<th>Gift</th>
<th>UMCP Public Count</th>
<th>Regents Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charitable Lead Trusts</td>
<td>Face value of estimated payments for term of trust.</td>
<td>Report face value of income as current gift (pledge) during and for five years after campaign.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Beyond 5 years after campaign, report at discounted present value.</td>
</tr>
<tr>
<td>Wholly Charitable Trusts</td>
<td>FMV of assets in year trust established</td>
<td>FMV of assets in year trust established</td>
</tr>
<tr>
<td>Administered by Others</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited Partnerships, Mortgages &amp;</td>
<td>FMV after review &amp; approval.</td>
<td>FMV after review &amp; approval.</td>
</tr>
<tr>
<td>Notes, Patents &amp; Copyrights</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Government Grants &amp; Contracts</td>
<td>Grant Income as received.</td>
<td>Grant Income as received.</td>
</tr>
<tr>
<td></td>
<td>Contract revenue excluded.</td>
<td>Contract revenue excluded.</td>
</tr>
<tr>
<td>Matching Gifts</td>
<td>Included as received.</td>
<td>Included as received.</td>
</tr>
<tr>
<td>Revocable Gifts</td>
<td>Separate category at face value, providing evidence of gift is obtained</td>
<td>Separate category at face value, providing evidence of gift is obtained</td>
</tr>
<tr>
<td></td>
<td>Donor must be 65 years of age.</td>
<td>Donor must be 65 years of age.</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>Cash surrender value if owned by Institution. If not, see REVOCABLE</td>
<td>Cash surrender value if owned by Institution. If not, see REVOCABLE</td>
</tr>
<tr>
<td></td>
<td>Additional premiums counted as gift</td>
<td>Additional premiums counted as gift</td>
</tr>
<tr>
<td>Realized Bequests &amp; Other Distributions</td>
<td>Amounts received in excess of prior amount counted, if any.</td>
<td>Amounts received in excess of prior amount counted, if any.</td>
</tr>
<tr>
<td>Gifts to Athletics</td>
<td>Full face value of the gift.</td>
<td>Full face value of the gift.</td>
</tr>
</tbody>
</table>
C. Named Gift Requirements

Provided below are the minimum gift amounts required for an endowment fund to be named by a donor. It is assumed that naming gifts will be paid within a five-year pledge period. The minimum amount required to establish a separate endowment account is $25,000, payable within a five-year period.

**Faculty Development, Recruitment, and Retention**

<table>
<thead>
<tr>
<th>Position</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distinguished Chair</td>
<td>$2,000,000</td>
</tr>
<tr>
<td>Chair</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Distinguished Professorship</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Professorship</td>
<td>500,000</td>
</tr>
<tr>
<td>Distinguished Faculty Fellowship</td>
<td>300,000</td>
</tr>
<tr>
<td>Faculty Research Fellowship</td>
<td>200,000</td>
</tr>
<tr>
<td>Junior Faculty Fellowship</td>
<td>100,000</td>
</tr>
</tbody>
</table>

**Student Awards and Student Financial Assistance**

**Graduate Students**

<table>
<thead>
<tr>
<th>Position</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distinguished Graduate Fellowship</td>
<td>500,000</td>
</tr>
<tr>
<td>Graduate Fellowship</td>
<td>250,000</td>
</tr>
<tr>
<td>Graduate Student Award</td>
<td>100,000</td>
</tr>
</tbody>
</table>

**Undergraduate Students**

<table>
<thead>
<tr>
<th>Scholarship</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visionary Scholarship</td>
<td>400,000</td>
</tr>
<tr>
<td>Gateway Scholarship</td>
<td>200,000</td>
</tr>
<tr>
<td>Pathway Scholarship</td>
<td>100,000</td>
</tr>
<tr>
<td>Scholarship Award</td>
<td>25,000</td>
</tr>
</tbody>
</table>

**Programs**

The named gift levels for schools, colleges, departments centers, institutes and academic programs will be established on a case-by-case basis. Generally, the endowment will need to generate 10% to 20% of the unit’s operating budget, depending on the size of the unit.

**Facilities**

A. Buildings

The naming level for buildings will be established on a case-by-case basis. Preferably the naming gift will represent 50% of the estimated total but should not be less than 20%.

B. Interior Spaces

The naming level for classrooms and laboratories and other interior spaces will be established on a case-by-case basis. Generally, the naming gift will be expected to represent at least 50% of the estimated cost of the space.

**Note:** Based on the policy of the University of Maryland College Park Foundation, approximately 5% of the market value of an endowment fund is available each year to support the purposes (s) of the fund.
D. Prospect Management Policy

Outreach to donors and prospective donors will be coherent, coordinated, and professional, governed by the imperative of high quality “customer relations.” If we want to be recognized as a first-class institution, we must manage our relations with prospects in a first-class manner.

Our policy for managing relations with prospects and donors is known as PEG (Prospect Evaluation Group). It acknowledges that, while the relations formed by our alumni and friends are ultimately determined by their own interests and preferences, the activities of our staff must be coordinated. Until the potential donor or donors makes his or her interests clear, we make educated guesses concerning where their philanthropic interests might lie.

Hence, PEG will remain as the policy for the campaign. Its essential elements are as follows:

**Major Prospects (rating of $50,000 and greater) will be assigned to a unit based on three factors:**

1. Known interest or interests
2. Giving history and record of interaction with Maryland
3. The number of prospects currently assigned to the requesting development officer

Assignments must be requested and justified by the unit and will be determined by a committee of development staff (at least half of whom will be from schools and colleges.) In practice, if sufficient documentation by the requesting unit is provided and no other unit contests the case, the assignment will be automatic.

**An assignment means that:**

- No other unit may solicit the prospect for a major gift
- The unit with the assignment has the obligation to advance the relationship toward a solicitation.
- Normal annual appeals, such as those by the Maryland Fund for Excellence, the Terrapin Club, and the Spotlight Society (Clarice Smith Performing Arts Center), are allowed. A stop on annual appeals may be granted under special circumstances, upon request by the assigned unit to the Campaign Director.
- If after one year, there is no record of substantive interaction with an assigned prospect, that prospect will automatically be designated for the Open Pool, by allowing cultivation activity by any part of the University and possible reassignment.
- Joint and secondary assignments may be granted by the PEG committee. In such cases the assigned units are required to work together and keep each other fully informed in advance of significant interaction with a prospect.