



UNIVERSITY OF HAWAII FOUNDATION

## OVERVIEW OF PRIVATE FUNDRAISING AT UH HILO

### UH Hilo Office of Development

The UH Hilo Office of Development is staffed by five employees of the University of Hawai'i Foundation, who are tasked with raising major gifts for UH Hilo and its six colleges, the Vulcan Athletics program, the 'Imiloa Astronomy Center, the Mookini Library, the Performing Arts Center, and the North Hawaii Education and Research Center.

### UH Hilo Recent Fundraising History

Year	Total Private Funds Raised	
FY 2010 to date	\$2,471,396	(partial year)
FY2009	\$5,978,322	<b>UH System Centennial Campaign FY2003-2009</b> Goal: \$15,000,000 Raised: \$15,374,905
FY2008	\$3,324,789	
FY2007	\$1,109,232	
FY2006	\$1,230,443	
FY2005	\$498,728	
FY2004	\$2,773,244	
FY2003	\$460,147	
FY2002	\$810,600	
FY2001	\$385,000	
FY2000	\$312,069	
1990's	\$150,000-\$200,000 per year	

### UH Hilo Development Staffing

Year	Development Staffing
FY2010	4 staff, expanded to 5 staff
FY2009	5 staff; reduced to 4 staff
FY2008	4 staff; expanded to 5 staff
FY2007	2 staff; expanded to 3 staff
FY2006	2 staff
FY2005	1 staff
FY2004	1 staff
FY2003	1 staff
FY2002	1 staff
FY2001	1 staff
FY2000	1 staff
1990's	1988-1990 – 1 staff 1990-1994 – 2 staff 1994-1999 – No staff!

## UH Hilo Endowment Growth

	Dollars Invested	Market Value
31-Dec-09	\$3,374,672	\$3,503,599
30-Jun-09	\$3,010,323	\$2,867,015
30-Jun-08	\$2,970,608	\$3,586,425
30-Jun-07	\$2,444,833	\$3,249,129
30-Jun-06	\$2,265,024	\$2,824,594
30-Jun-05	\$2,148,825	\$2,522,748
30-Jun-04	\$1,981,893	\$2,297,067
30-Jun-03	\$1,182,780	\$1,355,615
30-Jun-02	\$1,189,375	\$1,433,188
30-Jun-01	\$1,107,607	\$1,643,004
30-Jun-00	\$1,018,512	\$1,727,454
30-Jun-99	\$1,004,672	\$1,527,698

## What campus priorities did private donations fund in FY2009?

Funds Raised	Percentage	Campus Priority
\$1,590,119	26.6%	Program/Enrichment
\$1,564,104	26.2%	Student scholarships
\$1,194,186	20.0%	Research
\$679,820	11.4%	Library
\$500,000	8.4%	Unrestricted
\$167,376	2.8%	'Imiloa Astronomy Center
\$144,506	2.4%	Athletics
\$65,235	1.1%	Faculty support
\$51,720	0.9%	Performing Arts Center
\$20,025	0.3%	Facilities

## Where did the private donations come from in FY2009?

Breakdown	Source
69% (Note: 88% was 2009 national average)	Individuals
29.9%	"Friends"
21.1%	Family Foundations
16.9%	Alumni
.4%	Clubs/Associations
.5%	Parents
.2%	Faculty/Staff
28% (Note: 4% was 2009 national average)	Corporations
3% (Note: 12% was 2009 national average)	Foundations

## Overview of the UH Foundation

The University of Hawai‘i Foundation is the private, not-for-profit 501(c)(3) organization which is exclusively charged with raising private funds on behalf of the University of Hawai‘i System. The Foundation conducts fundraising campaigns around university priorities and provide central services to raise funds, manage assets, and administer gift accounts for all ten UH campuses.

The operations of the UH Foundation are funded from four sources: (1) a contracted amount paid by UH for fundraising and alumni relations services, (2) an annual assessment of the market value of the endowment, (3) interest on short-term investments, and (4) a one-time administrative assessment of 3.5% on all incoming donations.

## Additional Support from the UH Foundation to UH Hilo

In addition to deploying five foundation employees on the UH Hilo campus, the UH Foundation provides support to UH Hilo through a variety of specialized services. One of the important responsibilities of the Development Office at UH Hilo is to ensure that this UH Foundation support is drawn upon and effectively utilized across the UH Hilo campus.

Several UH Foundation units offer services which are directly available to faculty and staff at UH Hilo:

- Annual Giving: This unit at the Foundation manages all of UH Hilo’s annual appeal mechanisms, including:
  - direct mail
  - telephone solicitations
  - on-line giving, and
  - matching gifts

Currently this unit conducts four mail solicitations for UH Hilo each year (UH Hilo-wide, Vulcan Athletics, UH Hilo Parents, and UH Hilo Performing Arts Center), but on request additional mailings may be done (e.g., North Hawaii Education and Research Center, the ‘Imiloa Astronomy Center, etc.). Three telephone calling campaigns are conducted for UH Hilo each year (UH Hilo-wide, Vulcan Athletics and UHH Parents). The UH Hilo Office of Development works with the Foundation on the text of each appeal, and the Foundation arranges for all the mechanics, including the printing of special stationery and UH Hilo return envelopes. Annual Giving also offers on-line giving options for UH Hilo through links to the UH Foundation’s secure website (<https://www.uhf.hawaii.edu/giving-gift.aspx>).

- Alumni Relations: This unit at the UH Foundation functions as the central alumni resource for the entire UH system. Alumni Relations is able to provide alumni mailing lists on request to individual departments. Staff in this unit also assist Yu Yok Pearring on the implementation and funding of her activities involving the “UH Hilo Alumni and Friends Association.”

- Corporate and Foundation Relations: This is a unit at the UH Foundation which is available to mentor UH faculty and staff with private (non-government) grant research and writing. UH personnel who have ideas for grant-fundable projects can find more information about creating grant proposals and researching private foundation funders—and can contact the Corporate and Foundation Relations team—through the UH Foundation website (<http://www.uhf.hawaii.edu/cfr/index.aspx>).

Other units at the UH Foundation function behind the scenes, working directly with our five onsite development staff to extend our reach and support our work:

- Communications and Marketing: Professional staff at the UH Foundation currently assist us with the writing and production of materials such as our Case for Support. They also help publicize our fundraising successes, prepare press releases, and write up our local donors for inclusion in the UH Foundation Annual Report and other publications.
- Research: Staff in this UH Foundation unit assist us in all aspects of donor research, searching public information sources to prepare net worth analyses, research on property/stock holdings, and biographical information.
- Estate and Gift Planning: This UH Foundation unit specializes in the technical aspects of setting up bequests, real estate donations, trusts, and other deferred gift vehicles. When local donors express an interest in these types of gifts, we are able to call upon planned giving specialists who can assist us in negotiating terms and agreements.
- Data and Technology: This unit at the UH Foundation manages a central database of over 300,000 contacts, including alumni, donors and donor prospects.
- Scholarships: This unit works with both the UH Hilo Development Office and Jeff Scofield in UH Hilo's Financial Aid Office to document scholarship agreements with private donors, process financial payments to students, and notify donors when their scholarships are awarded. Once a year they come to Hilo to co-host (and share the cost of) a scholarship reception to thank local donors and honor student recipients. The 2009 Scholarship Reception will take place at UH Hilo on Monday, November 2, 2009.
- Special Events: On request, this unit at the UH Foundation assists us with the planning and implementation of high-level donor-focused events, such as those which were organized in August 2007 to kick off the public phase of the UH System Centennial Campaign on the Big Island.
- Fiscal Office: This unit at the UH Foundation oversees all of UH Hilo's 240 Foundation accounts, depositing new donations, issuing IRS-auditable tax receipts to donors, reporting to account administrators, and processing payments upon request. This unit also assists in managing the university's endowment (currently \$180 million).
- International Engagement: The UH Foundation's Director of International Engagement advises the UH Hilo Chancellor and development office on strategies for extending UH Hilo's overseas outreach, through reconnection with international alumni and identification/cultivation of overseas prospects and donors.

## How Can UH Hilo Faculty and Staff Help with Private Fundraising?

Fundraising does not take place in a vacuum, nor is it the exclusive responsibility of development professionals. UH Hilo faculty and staff are encouraged to participate in several ways, the most important of which is to identify and describe:

- *What are the most significant departmental and college priorities?*
- *What initiatives will have the most impact on the mission of each College and the university in moving UH Hilo forward in years to come?*
- *What is the case for private support of these priorities?*

Here are some other ways in which faculty and staff can support the work on the Development Office and assist us in raising more private funds for UH Hilo:

1. Monitor your existing UH Foundation accounts and make sure you expend the funds so that we can report back to donors with success stories...and re-solicit them for new gifts!
2. Introduce friends/contacts in the community to UH Hilo by inviting them to visit the campus, meet with students or faculty, or attend events. The Development Office regularly arranges events such as “Rubber Slipper Tours,” theater events, receptions, Chancellor’s Advisory Board meetings, or “Breakfast with the Chancellor” gatherings, and we’re always looking for new prospects to invite.
3. Share your latest departmental materials, upcoming events, and successful accomplishments with the Development Office so that we know what you’re doing and can help spread the word to the donor community.
4. Offer to make a presentation on your department or area of research at a donor gathering. We are often looking for faculty who can make informal presentations at such gatherings or who can host site visits to labs or other facilities.
5. Assist in the stewardship of donors who have contributed to your department by writing thank you notes, sending invitations “to see your gift in action,” or making arrangements to accompany your Dean or development staff on follow up visits, etc. The Development Office can supply contact information and assist with logistics.
6. Share rosters, names/addresses of former students so that we can capture more UH Hilo alumni in the UH Foundation database (including those who attended, but did not graduate).
7. Route all ideas for fundraising appeals through our office (and make sure that your students do the same) to assure that UH Hilo speaks with “one fundraising voice” and coordinates our approaches to individual donors and businesses in our small community.
8. Last, but not least, lead by example and become a donor to UH Hilo yourself. Payroll deduction can make this painless and easy.

## UH Foundation Staff at UH Hilo

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