

UVA ADVANCEMENT

WEEK OF LEARNING

SCALING NEW HEIGHTS

JANUARY 16 – 19, 2024



Fundraising Lead Identification Program (FLIP)

PRESENTED BY:
Alison Freeman, Chris Hubert & Sarah Robinson

Agenda

- What is FLIP?
- Current Lead Program
- FLIP – Next Level
- FLIP – Monthly Engagement Pool
- FLIP – Serving All Levels
- FLIP – Next Steps
- FLIP – Impact
- Questions

Prospect Management, Research & Analytics (PMR&A)

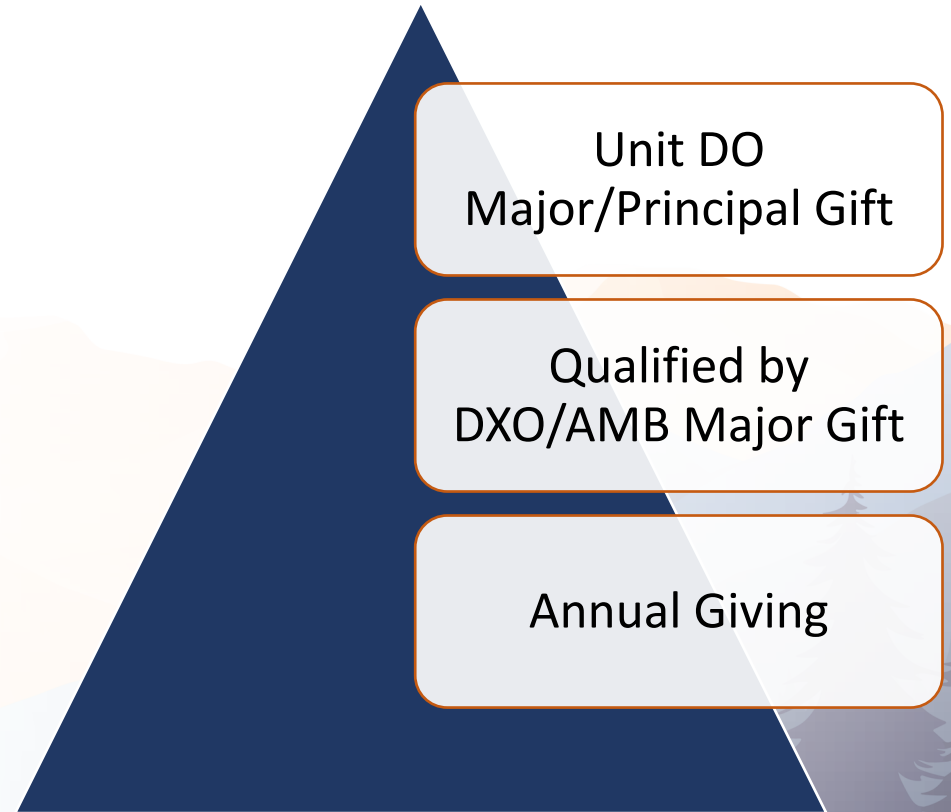
- Team goal is to support frontline efforts and amplify the donor pipeline via a liaison model
- Structure built to provide proactive and personalized service
- Six pods, each working with focused group of schools/units

<p>Pod 1</p> <ul style="list-style-type: none">• Medical School Foundation• UVA Health <p>Prospect Manager: Chelsea Laxer Researcher: Megan Randall Analyst: Lilly Suwinski</p> <p>Meet the Team ></p>	<p>Pod 2</p> <ul style="list-style-type: none">• Alumni Association• Athletics• Continuing and Professional Studies• DEI• DXOs and the Virginia Fund• Jefferson Scholars• Reunion Giving• University Priorities <p>Prospect Manager: David Ornelas Researcher: Rima Masters Analyst: Ryan Collins</p> <p>Meet the Team ></p>	<p>Pod 3</p> <ul style="list-style-type: none">• Corporate and Foundation Relations• Darden• Gift Planning• Law• Parents• Principal Gifts• School of Data Science• Student Affairs• University Enrichment <p>Prospect Manager: Deb Darling Researcher: Akilah Blakey Analyst: Becky Collier</p> <p>Meet the Team ></p>
<p>Pod 4</p> <ul style="list-style-type: none">• Arts & Sciences• Batten• Center for Politics• College at Wise• Engineering and Applied Science• McIntire• Miller Center• Weldon Cooper <p>Prospect Manager: Alison Freeman Researcher: Amelia Kelly Analyst: Alyssa Champa</p> <p>Meet the Team ></p>	<p>Pod 5</p> <ul style="list-style-type: none">• Architecture• Arts and Museums• Blandy Experimental Farm• Brody Jewish Center• Contemplative Sciences• Education and Human Development• Madison House• Osher Lifelong Learning• Rare Book School• University Library• Virginia Humanities• Women's Center• WTJU <p>Prospect Manager: Delia Kloh Researcher: Chris Hubert Analyst: Teresa Liu</p> <p>Meet the Team ></p>	<p>Pod 6</p> <ul style="list-style-type: none">• University Engagement and Annual Giving <p>Assistant Director for Pipeline Analytics: Sarah Robinson</p> <p>Meet Sarah ></p>

Fundraising Lead Identification Program (FLIP)

What is FLIP?

The Fundraising Lead Identification Program is a holistic prospecting approach that provides and tracks prospects across grounds. Creating a pipeline from annual gifts into major gift, planned gift, and principal. PMR&A will identify prospects through a variety of prospect pools. Each pool will be filtered and vetted by the PMR&A team where major gift prospects will be identified and referred to the appropriate unit for qualification.



Current Lead Program

Prospect Research Lead Program

- Established July 2022 (FY23)
- Identify MG prospects
- Track proactive projects

Results

- 1K+ leads identified since start of FY23
- ~\$600M in capacity wealth added to database (most in \$500K)
- \$800K+ in cash to date; \$1.6M in portfolio activity

Feedback

- Broaden criteria for smaller units
- Look at repeat/total giving
- Coordinate pod squad prospecting with other work in area

FLIP – Next Level

Pools

- Monthly engagement
- Parent Program
- Suspect Pool
- Company Stock
- Ad Hoc – Board recruitment, capital projects

Broader Criteria

- Widen prospecting pools
- More vetting from PMR&A

Coordination

- Annual Giving, DXO, & Ambassador
- PMR&A Team

Accountability

- Outreach timeline
- PM follow up with DOs

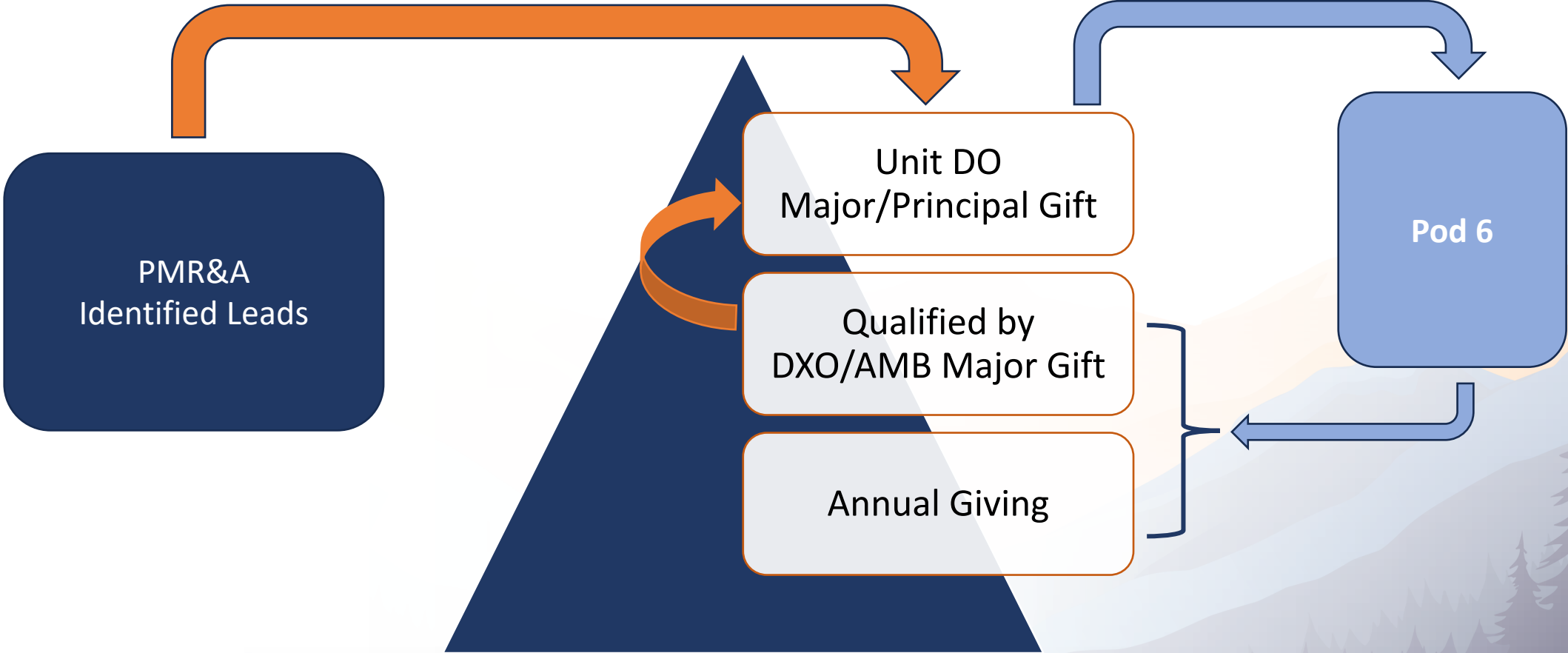
New Indicators

- Stickiness
- Velocity

FLIP - Monthly Engagement Pool

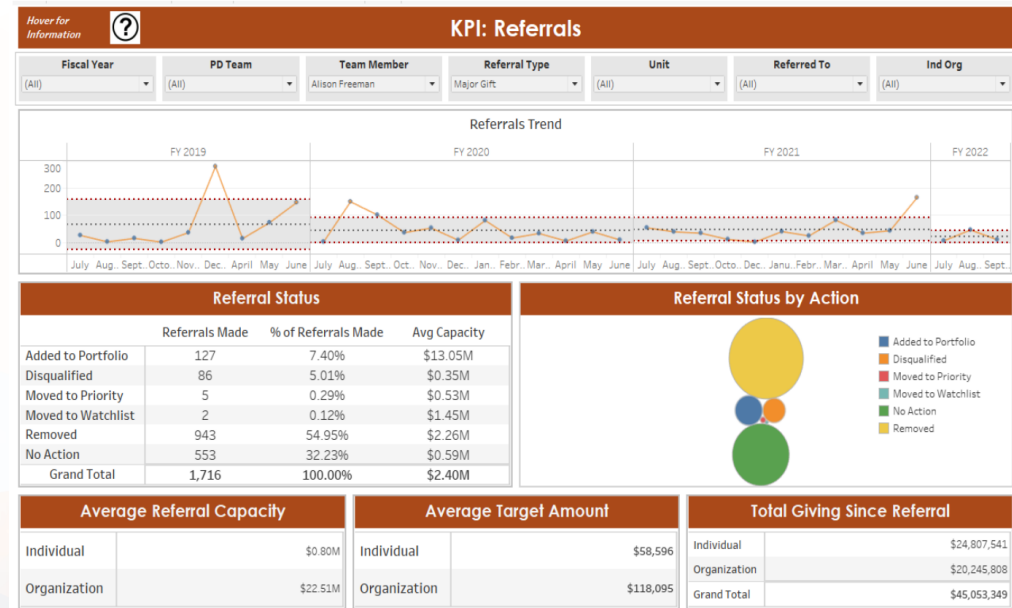
- Pools based on recent giving specific to unit criteria
- Reports sent to research team at beginning of month for review
- Reviewed for capacity/propensity with strategic recommendation
- Sent through our pod PMs to major gift DOs for discovery
- Other tracks
 - University Ambassadors
 - DXOs & Annual Giving

FLIP – Serving All Levels



FLIP - Next Steps

- Exploration of additional pools
- Build out full process flow
- Pod 6 integration
- Partner feedback
- Tracking and reporting dashboard



FLIP - Impact

- Impact for Development officer
- Serving the entire university
- Building pipeline with high quality opportunities
- Coordination with Ambassadors/DXOs/Annual Giving



Success Stories

Ambassadors Program Win

- The UA Ambassador program has resulted in nearly \$50 million in gifts since establishment in 2015
- There is a six-fold increase in the average annual gift for a donor referred to a DO from an Ambassador
- For those not referred, there is still at least double in giving on average

DXO Win: Abby Simmerman, University of Virginia



Alumni

Class of 2005

\$980

Lifetime Giving

\$10

First Gift

\$100

Last Gift

- ✓ DXO contacted donor for first time in 3 years in December of 2022.
- ✓ DXO conducted meeting in February 2023 and renewed \$100 gift to Cancer Center. Donor was thrilled to be reconnected with UVA.
- ✓ During meeting, DXO uncovered donor's desire to leave UVA in their estate plan to further support medical research at UVA. Donor was elevated to a major gift officer.
- ✓ Major gift officer met with donor in New York in October 2023 to finalize gift.



\$25,000,000 expectancy closed with designation towards the Medical School

▲evertrue

Questions

