



## **September 27, 2023 Strategic Partnerships and Advancement Committee**

Board of Trustees

FAIRWINDS Alumni Center

Sep 27, 2023 2:45 PM - 3:15 PM EDT

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## **September 27, 2023 Strategic Partnerships and Advancement Committee**

Board of Trustees

Sep 27, 2023 at 2:45 PM EDT to Sep 27, 2023 at 3:15 PM EDT

FAIRWINDS Alumni Center

**Meeting Details:** [https://youtube.com/live/BKrij\\_5\\_b\\_sA](https://youtube.com/live/BKrij_5_b_sA)

**Conference Call Number:** +1 929 205 6099

**Meeting ID:** 916 9962 4851

**Passcode:** 586734

## **Agenda**

### **I. Agenda**

#### **Call to Order and Welcome**

Presenter: John Miklos, Chair, Strategic Partnerships & Advancement Committee

#### **Roll Call**

Presenter: Janelle Hom '10MA, Director, Foundation Board Relations

### **II. Minutes of the February 23, 2023, meeting**

Presenter: Chair Miklos

### **III. Discussion**

#### **A. DISC - 1: Fiscal Year 2022-2023 Attainment Review**

Presenter: Rodney Grabowski, Senior Vice President for Advancement & Partnerships and CEO, UCF Foundation, Inc.

#### **B. DISC - 2: Fiscal Year 2023-2024 Attainment and Divisional Goals**

Presenter: Rodney Grabowski, Senior Vice President for Advancement and Partnerships and CEO, UCF Foundation, Inc.

#### **C. DISC - 3: Partnerships Review and Strategic Direction**

Presenter: Rodney Grabowski, Senior Vice President for Advancement and Partnerships and CEO, UCF Foundation, Inc.

### **IV. Information**

#### **A. INFO - 1: UCF Specialty License Plate Sales Update**

Presenter: Patrick Burt, Chief Marketing and Communications Officer

#### **B. INFO - 2: Fiscal Year 2023-2024 Feasibility Study**

Presenter: Rodney Grabowski, Senior Vice President for Advancement and Partnerships and CEO, UCF Foundation, Inc.

### **V. New Business**

Presenter: Chair Miklos

### **VI. Adjournment**



UNIVERSITY OF CENTRAL FLORIDA

Board of Trustees  
Strategic Partnerships and Advancement Committee Meeting  
February 23, 2023  
Live Oak Center

MINUTES

**CALL TO ORDER**

Chair Joseph Conte (Zoom), Chair of the Strategic Partnerships and Advancement Committee, called the meeting to order at 4:00 p.m. and stated that the meeting was covered by the Florida Sunshine Law and the public and press were invited to attend. Strategic Partnerships and Advancement Committee members in attendance were Vice Chair Harold Mills, and Trustees Cardenas, Condello and McAlpin. Trustee Lopez was not in attendance. Chair Martins and Trustees Christy, Altizer, King and Okaty attended as guests.

**MINUTES**

The minutes from the February 22, 2022, meeting were unanimously approved as written.

**NEW BUSINESS**

No items of new business were brought forward.

**DISCUSSION**

Trustee Conte invited Rodney (Rod) Grabowski, Senior Vice President for Advancement and Partnerships and CEO, UCF Foundation Inc. to share an update about current attainment and progress made towards the fiscal year goal. Grabowski shared reporting related to fundraising forecasting and current attainment. It was projected that Advancement and Partnerships will surpass their FY23 fundraising goal by June 30, 2023.

Grabowski shared work being done to improve the infrastructure to allow Advancement fundraisers to concentrate on fundraising. Grabowski noted several highlights, including a philanthropic training session scheduled for March 21, 2023, to assist academic leadership with preparing for a future comprehensive fundraising campaign.

Grabowski concluded his remarks by sharing information on the forthcoming corporate partnerships program (Pegasus Partners). It was noted that the program remained in the development stage and additional information would be shared with the Board in the future.

Chair Conte shared information about UCF Day of Giving on April 13, 2023. He requested the Board of Trustees to lead by example and challenged his fellow Trustees with achieving 100% participation on Day of Giving.

### **INFORMATION**

Chair Conte asked if there were any questions concerning the specialty license plate update. There were no questions.

### **ADJOURNMENT**

In response to Chair Conte's call for 100% Trustee participation in UCF Day of Giving, Chair Martins encouraged his fellow Trustees to make a philanthropic contribution in support of UCF.

Chair Martins adjourned the meeting at 4:38p.m.

Reviewed by: \_\_\_\_\_  
Joseph Conte, Chair, Strategic Partnerships and  
Advancement Committee

Date: \_\_\_\_\_

Submitted by: \_\_\_\_\_  
Michael Kilbride, Associate Corporate Secretary

Date: \_\_\_\_\_



# Board of Trustees

*Strategic Partnerships & Advancement Committee*

*September 27, 2023*

## **Agenda Item**

DISC-1: Fiscal Year 2022-2023 Attainment Review

## **Proposed Committee Action**

This report is intended to engage Trustees in a discussion on positive outcomes and areas of opportunity around attainment achievements from Fiscal Year 2022-2023.

## **Authority for Board of Trustees Action**

N/A

### **Supporting Documentation Included**

Attachment A: Attainment Presentation

### **Facilitators/Presenters**

Rod Grabowski, Senior Vice President, UCF Advancement & Partnerships, CEO, UCF Foundation, Inc.



# **DISC-1: Fiscal Year 2022-2023 Attainment Review**

## **EXECUTIVE SUMMARY**

### **Objective**

This report is intended to engage Trustees in a discussion on positive outcomes and areas of opportunity around attainment achievements from fiscal year 2022-2023.

### **Summary of Key Observations/Recommendations**

- Advancement & Partnerships achieved 135% (\$114.3 million) of goal (\$85 million).
- The fiscal year 2022-2023 attainment figures represent a 50% increase from the prior fiscal year actuals.
- The most recent attainment figures are robust in principal gifts, corporate, and foundation activity.

### **Additional Background**

The Strategic Partnerships and Advancement Committee provides oversight and strategic direction to the University's advancement, economic and business development activities while monitoring key performance indicator results, including fundraising targets.

### **Rationale**

The Board of Trustees' oversight of strategic partnerships and advancement communications aligns with the UCF Strategic Plan, which includes an annual attainment goal of \$100 million (to be achieved by 2027).

### **Implementation Plan**

The Advancement and Partnerships team is actively pursuing fiscal year 2023-2024 fundraising goals and enhancing the existing donor pipeline utilizing industry best practices in prospect management.

### **Resource Considerations**

The impact of successful fundraising will expand access to higher education and help to make it affordable through scholarships and resources. This informational item will not result in any additional costs to the University.

## Conclusion

Fiscal Year 2022-2023 saw record attainment figures, coming in at \$114.3 million, or 135% of goal. Advancement and Partnerships experienced a robust year for corporate and foundation activity, accounting for almost \$68 million in attainment.

Staff encourages the Board of Trustees to consider the attainment figures of both success and areas for opportunity, and how they might engage in the attainment activities for the coming fiscal year through personal philanthropy and introductions to potential donors and partners to the university.



# **UCF ADVANCEMENT & PARTNERSHIPS**

## **Fiscal Year 2022-2023**

### **Attainment Review**

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Rodney Grabowski, CFRE

Senior Vice President for Advancement & Partnerships and CEO, UCF Foundation, Inc.

August 2023



# FY2022-2023 ATTAINMENT RESULTS

College/Unit	Goal	Attainment	Percentage to Goal
Arts & Humanities	\$5,000,000	\$1,300,219	26%
Athletics	\$35,000,000	\$49,812,415	142%
Burnett Honors College	\$600,000	\$145,301	24%
Business Administration	\$5,000,000	\$4,656,825	93%
Community Innovation & Education	\$1,500,000	\$345,350	23%
Engineering & Computer Science	\$3,000,000	\$1,800,075	60%
Health Professions & Sciences	\$500,000	\$367,901	74%
Medicine	\$2,500,000	\$4,023,728	161%
Nursing	\$10,500,000	\$27,352,377	260%
Optics, Photonics, CREOL	\$500,000	\$455,084	91%
Rosen College of Hospitality Management	\$1,000,000	\$623,770	62%
Sciences	\$1,500,000	\$10,067,734	671%
SSWB	\$3,000,000	\$3,716,898	124%
Undergraduate Studies	\$100,000	\$132,016	132%
WUCF	\$3,800,000	\$4,702,647	124%
Divisions/All Other	\$11,500,000	\$4,829,238	42%
<b>Grand Total</b>	<b>\$85,000,000</b>	<b>\$114,331,578</b>	<b>135%</b>

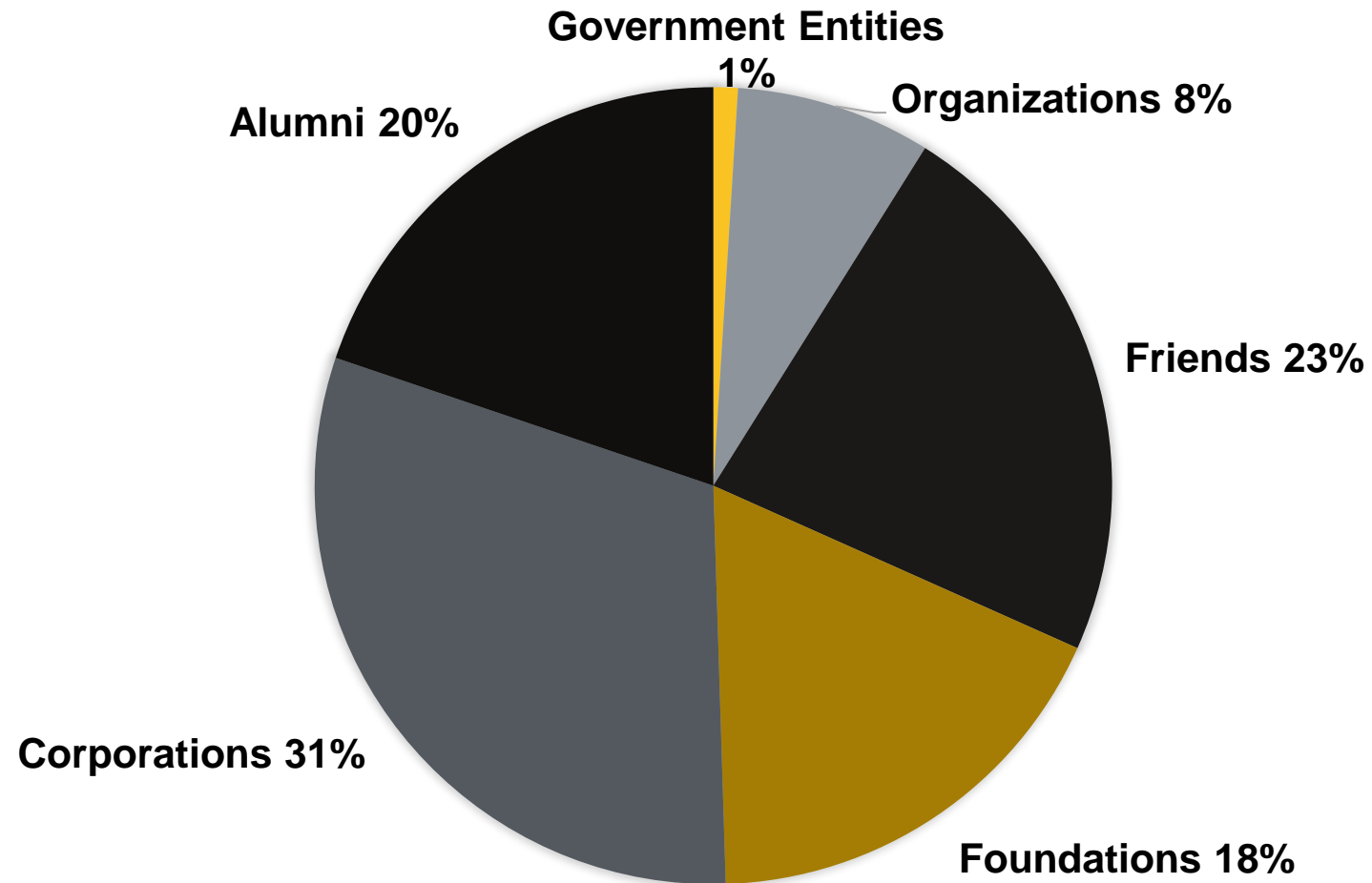
## FY2022-2023 FUNDS BY GIFT TYPE

Category	2021	2022	2023
Outright Gifts	\$55,252,840	\$23,966,780	\$32,979,305
Gifts-in-kind	\$471,565	\$1,929,814	\$341,636
Planned Gifts	\$8,878,227	\$2,533,951	\$8,132,683
Pledges	\$12,816,662	\$47,465,093	\$72,877,956
Real Estate	\$92,000	\$0	\$0
<b>Grand Total</b>	<b>\$77,511,294</b>	<b>\$75,895,638</b>	<b>\$114,331,578</b>

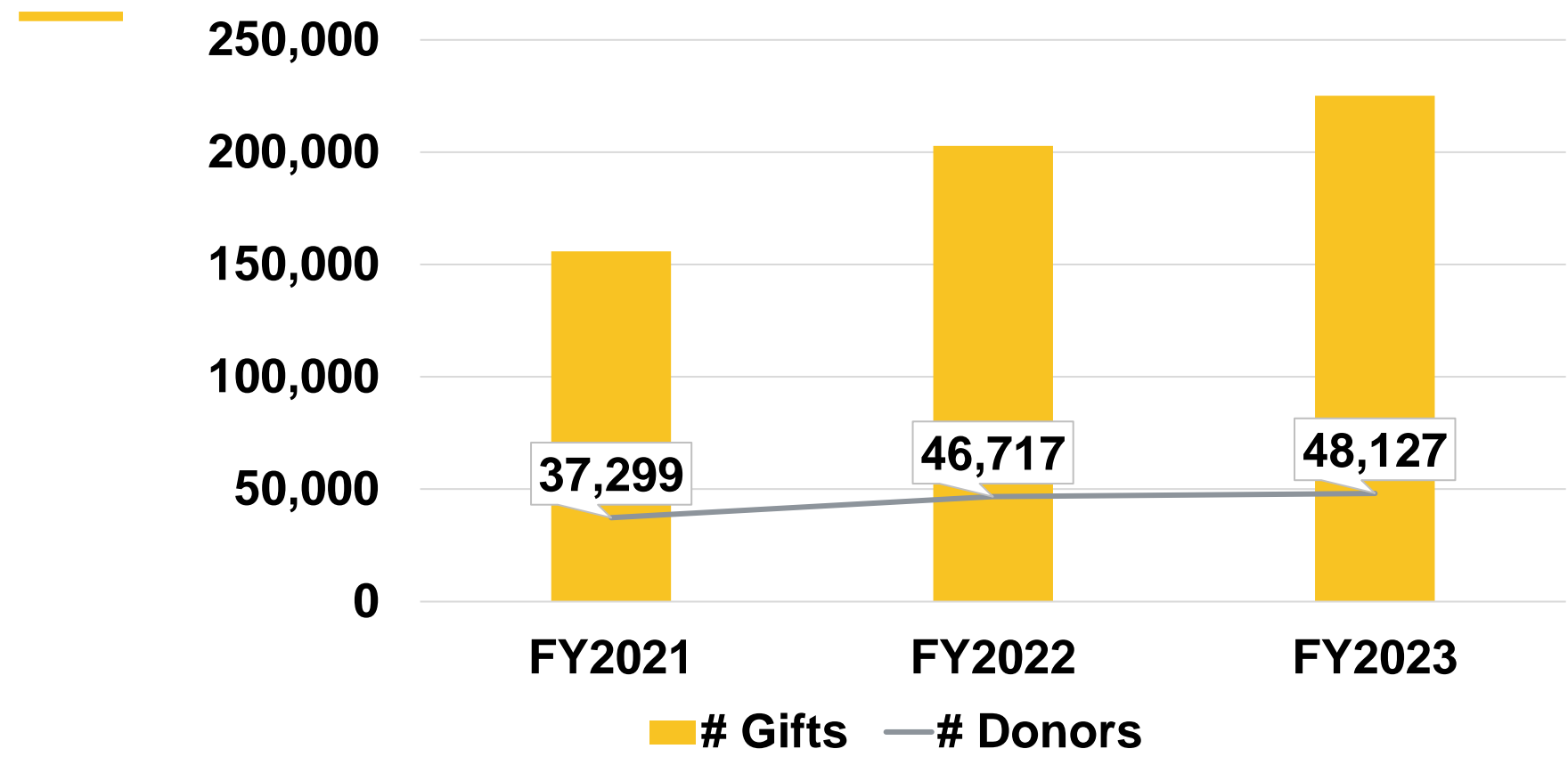
# FY2022-2023 FUNDS BY USE

Use Category	Revenue
Current Operations	\$70,238,516
Facilities and Equipment (Capital)	\$32,980,058
Endowment	\$9,639,477
TBD (Donor to Finalize Designation)	\$1,473,527
Grand Total	\$114,331,578

# FY2022-2023 FUNDS BY SOURCE



# FY 2021-2023 GIFT AND DONOR COUNTS





# QUESTIONS?

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# Board of Trustees

*Strategic Partnerships & Advancement Committee*

*September 27, 2023*

## **Agenda Item**

DISC-2: Fiscal Year 2023-2024 Attainment and Divisional Goals

## **Proposed Committee Action**

This report will provide the committee with a high-level strategy overview toward ensuring UCF's revenue sustainability. This report will include attainment, alumni engagement, and endowment performance metrics.

Trustees are encouraged to consider how they can engage as philanthropic advocates utilizing their networks to assist in achieving sustainable university support.

## **Authority for Board of Trustees Action**

N/A

### **Supporting Documentation Included**

Attachment A: Fiscal Year 2023-2024 Fundraising and Divisional Goals Presentation

Attachment B: Board Philanthropic Referral Form

### **Facilitators/Presenters**

Rod Grabowski, Senior Vice President, UCF Advancement & Partnerships, CEO, UCF Foundation, Inc.



## **DISC-2: Fiscal Year 2023-2024 Attainment & Divisional Goals**

### **EXECUTIVE SUMMARY**

#### **Objective**

This report will provide the committee with a high-level strategy overview toward ensuring UCF's revenue sustainability. This report will include attainment, alumni engagement, and endowment performance metrics.

#### **Summary of Key Observations/Recommendations**

- Advancement and Partnerships is actively working to achieve the 2027 Strategic Plan goal of \$100 million in annual attainment, setting the current fiscal year's goal at that amount.
- Current attainment as of September 14, 2023, sits at \$6.3 million. \$12 million is projected to close by September 30, 2023.
- Advancement and Partnerships is actively focused on endowment growth from \$215 million (current) to \$350 million by 2027.
- Advancement and Partnerships recently developed divisional goals to focus efforts in eight key areas:
  - Strengthening philanthropy
  - Strengthening and expanding alumni engagement
  - Strengthening donor connection
  - Creating, aligning, and strengthening partnerships
  - Being the organization of choice
  - Creating a culture of operational excellence
  - Driving financial stability
  - Optimizing communication and marketing effectiveness

#### **Additional Background**

Overall attainment figures historically include \$77.5 million in 2021, \$75.8 million in 2022, and \$114.3 million in 2023.

Outright gifts saw a 37% increase from 2022 (achieving \$32.9 million); pledges saw a 153% increase from the prior year (achieving \$72.8 million).

#### **Rationale**

The Board of Trustees oversight of strategic partnerships and advancement communications aligns with the UCF Strategic Plan, which includes an annual attainment goal of \$100 million (achieved by 2027).



## **Implementation Plan**

Advancement & Partnerships is working toward \$100 million in annual, sustained attainment as well as growth of the endowment. The attainment goal for the current fiscal year is \$100 million.

## **Resource Considerations**

The impact of successful fundraising will expand access to higher education and help to make it affordable through scholarships and resources. This informational item will not result in any additional costs to the University.

## **Conclusion**

Trustees are encouraged to engage in discussion with leadership regarding UCF's philanthropic goals for FY 2023-2024, including how they can engage as philanthropic advocates utilizing their networks to assist in achieving sustainable university support.



# **UCF ADVANCEMENT & PARTNERSHIPS**

## **Fiscal Year 2023-2024**

### **Fundraising and Divisional Goals**

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Rodney Grabowski, CFRE

Senior Vice President for Advancement & Partnerships and CEO, UCF Foundation, Inc.

August 2023

# **FISCAL YEAR 2023-2024 GOALS AND OBJECTIVES**

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# FY2023-2024 ATTAINMENT GOALS

College/Unit	Goal
Arts & Humanities	\$10,000,000
Athletics	\$35,000,000
Burnett Honors College	\$400,000
Business Administration	\$6,000,000
Community Innovation & Education	\$1,500,000
Engineering & Computer Science	\$3,000,000
Health Professions & Sciences	\$600,000
Medicine	\$5,000,000
Nursing	\$4,000,000
Optics, Photonics, CREOL	\$500,000
Rosen College of Hospitality Management	\$1,000,000
Sciences	\$4,000,000
SSWB	\$4,000,000
Undergraduate Studies	\$200,000
WUCF	\$4,000,000
Divisions/All Other	\$20,800,000
<b>Grand Total</b>	<b>\$100,000,000</b>

# FY2023-2024 PROPOSAL FORECAST

## Expected Asks Q1 (Raw Data)

Quarter	Sum
July	\$0
August	\$17,891,200
September	\$47,128,498
Total	\$65,019,698

## Expected Closes Q1 (Raw Data)

Quarter	Sum
July	\$15,000
August	\$5,365,200
September	\$22,903,451
Total	\$28,283,651

## UCF Projection End of Q1

\$3.6M YTD Attainment

\$6.2M Forecast From Expected Closes\*

\$2.2M Estimated Annual + Other Giving

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**\$12M Projected by  
9/30/2023**

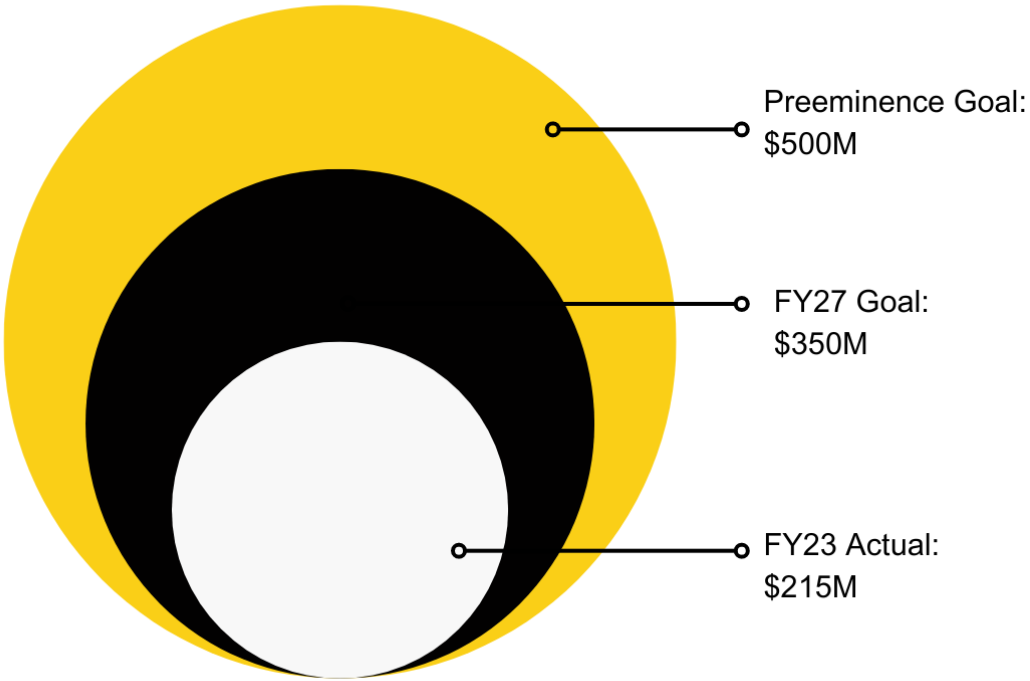
# UCF ENDOWMENT: CURRENT SNAPSHOT

SUS Peers	Endowment Size
<b>UCF</b>	<b>\$215 million</b>
FSU	\$898 million
UF	\$2,276 billion
USF	\$605 million
FIU	\$284 million

UCF Historical Annual Endowment Contributions	
CTOF Campaign (State Match Included - 1998-2006)	\$6.8M
IGNITE Campaign (No State Match - 2012-2018)	\$3.6M
5 Year Average w/ McKenzie Scott Gift	\$12.5M
5 Year Average w/o McKenzie Scott Gift	\$5.5M

*Note: Data as of 6/29/2023*

# UCF ENDOWMENT: LOOKING AHEAD



# MISCELLANEOUS UPDATES

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# GOST MODEL FRAMEWORK

**Planning exercise** undertaken by Advancement & Partnerships’ **Executive and Leadership Teams** to determine **FY24 Divisional Goals and Objectives**:

	What	How
High-Level	Goals	Strategies
Detail-Level	Objectives	Tactics

# FY24 DIVISIONAL GOALS

**1** Strengthen Philanthropy

**2** Strengthen and Expand Alumni Engagement

**3** Strengthen Donor Connection

**4** Create, Align and Strengthen Partnerships

**5** Be an Organization of Choice

**6** Build a Culture of Operational Excellence

**7** Drive Financial Stability

**8** Optimize Communication and Marketing Effectiveness

# SAMPLING OF FY24 OBJECTIVES

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- Sustain \$100 million in attainment.
- Engage 105,000 unique alumni.
- Increase fund utilization by 20%.
- Establish a corporate leadership council.
- Successfully fill at least 75% of vacant positions.
- Engage the Leadership Team in a review/update of Advancement & Partnerships' mission, vision and values.
- Identify at least one new source of revenue.
- Increase the aggregate average open rates and click-through rates of alumni emails by 20%.

## EXECUTIVE SEARCHES

**Boyden** selected as the **executive search firm** for two key vacancies, expected to go live by Labor Day:

- **CFO**
- **AVP, Partnerships**

## LEADERSHIP DEVELOPMENT

**Bryant Group** engaged to help build stronger leaders and teams:

- **1:1 coaching** and full-day workshops for Executive Team.
- **Small-group discussion** and full-day workshops for Leadership Team.

## VOLUNTEER SUMMIT

**Advancement Resources** will be onsite for a half-day **Volunteer Summit** this Fall:

- Interactive **working session**
- **October 26** at the Celeste Hotel

# FUNDRAISER PERFORMANCE MANAGEMENT (FPM)

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## Key Features:

- On demand self-service prospecting tool
- Interactive and interchangeable dashboards
- Donor and prospect activity notifications via email
- Custom models for Annual Giving and Major Giving likelihood to give
- Integrates with Apollo
- Provides a mobile app experience





# QUESTIONS?

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# Board of Trustees

## *Strategic Partnerships & Advancement Committee*

### Philanthropic Referral Form

Noting the Board of Trustees' oversight of philanthropic strategies and the monitoring of key performance indicators around fundraising targets, the following form has been developed to provide Trustees with an outlet to engage as philanthropic advocates by utilizing their own network to assist in achieving sustainable university support.

Please complete this form and return to Rod Grabowski, Senior Vice President, UCF Advancement & Partnerships at [Rodney.Grabowski@ucf.edu](mailto:Rodney.Grabowski@ucf.edu).

**Name of Referrer (Your Name)**

**Name of Referral (Their Name, Company)**

**Referral Contact Information (A&P staff will connect with you before conducting outreach)**

Phone:

Email:

**UCF Affiliations (if any) Examples: alumni, parent, etc.**

**Why do you feel this individual/company should be considered as a potential philanthropic partner?**

**Additional Information**



# Board of Trustees

## *Strategic Partnerships & Advancement Committee*

*September 27, 2023*

### **Agenda Item**

DISC-3: Partnerships Review and Strategic Direction

### **Proposed Committee Action**

This report will provide the committee with an update on Pegasus Partners and their alignment with talent development, discovery and innovation, collaborations, and philanthropy.

### **Authority for Board of Trustees Action**

N/A

#### **Supporting Documentation Included**

Attachment A: Partnerships Review and Strategic Direction

#### **Facilitators/Presenters**

Rod Grabowski, Senior Vice President, UCF Advancement & Partnerships, CEO, UCF Foundation, Inc.





## **DISC-3: Partnerships Review and Strategic Direction**

### **EXECUTIVE SUMMARY**

#### **Objective**

This report will provide the committee with an update on Pegasus Partners and their alignment with talent development, discovery and innovation, collaborations, and philanthropy.

#### **Summary of Key Observations/Recommendations**

- The Pegasus Partnership Program is a comprehensive approach to enterprise-level partnerships with corporations in strategic alignment with UCF. This program will develop new partners and revenue streams benefitting faculty, staff, and facilities.
- A Pegasus Partner involves a multi-pronged approach, including cash contributions (a five-year average of \$1M per year) as well as alignment in four key categories:
  - Talent development
  - Discovery and innovation
  - Collaborations
  - Philanthropy

#### **Additional Background**

This committee's oversight includes philanthropic strategies, which encompass Pegasus Partnerships. Acquiring strategic partners to amplify the university's impact falls under the Strategic Partnerships and Advancement Committee's key objectives.

#### **Rationale**

Per the 2022-2027 Strategic Plan, the goal was set to establish comprehensive partnerships that integrate education, research, the arts, service, workforce development, and philanthropic engagement. The Pegasus Partners Program brings together community-facing functions to streamline connections between the university and its industry, community, and public partners.

#### **Implementation Plan**

The Strategic Plan outlines a goal of five Pegasus Partnerships by 2027. The current phase has involved establishing the criteria for "Pegasus Partnerships." Advancement and Partnerships has outlined a timeframe for the next steps as this program is in active development. December 2023 is the target date for a permanent staff person to lead Pegasus Partnerships operations.

### **Resource Considerations**

This informational item will not result in any additional costs to the University. The success of the Pegasus Partnership program will integrate community-facing functions to streamline connections between the university and its industry, community, and public partners. Revenue from this program will directly impact the university's community and culture by adding financial resources for innovation and collaboration.

### **Conclusion**

This agenda item is provided as an informational update as the foundation for Pegasus Partnerships is established. Trustees are encouraged to share their feedback and pose questions to university leadership.



# **PARTNERSHIPS REVIEW AND STRATEGIC DIRECTION**

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Rod Grabowski, Senior Vice President

UCF Advancement & Partnerships

# WHAT IS THE PEGASUS PARTNERSHIP PROGRAM?

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**Comprehensive Approach to Enterprise-Level Partnerships  
with Corporations in Strategic Alignment with UCF**

## **VISION**

- Establish Multi-Year Pathways to Growth in Collaborations with Partners
- Navigation to Campus-Wide Corporate Engagement Activities
- Alignment of Partnerships with University's Areas of Strategic Focus
- Development of New Partners and Revenue Streams Benefitting Faculty, Staff and Facilities

# PEGASUS PARTNERS

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- Actively or committed to engagement in **all four categories** of partnership.
- Minimum \$ revenue to UCF.
  - 5-year average of **\$1 Million** per year.
- Invitation (expectation) for the appropriate most senior corporate leader to be a member of the **President's Industry Advisory Council**.



# CATALOG OF PARTNERSHIP OPPORTUNITIES



## TALENT DEVELOPMENT

- Curriculum development
- Continuing + Executive Ed
- Internship Programs
- Mentorship
- Advisory Boards
- Event participation
- Corporate Scholarship Programs



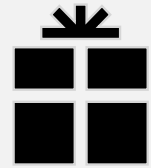
## DISCOVERY & INNOVATION

- Sponsored research
- Fellowships
- Applied and Sponsored research
- Industry affinity programs
- Patent licensing
- Intellectual Property
- Tech Transfer
- Commercialization
- Faculty Consulting



## COLLABORATIONS

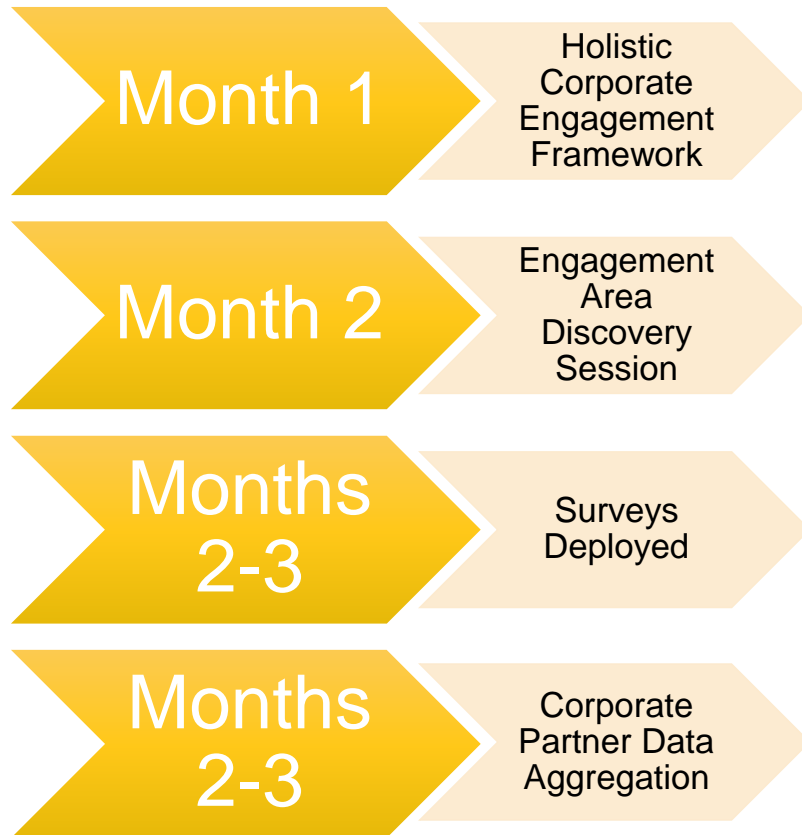
- Lobbying and advocacy
- Joint grant applications
- Business Services
- Shared Facilities
- Joint Ventures
- Business Incubators
- Joint R&D Contracts



## PHILANTHROPY

- Gifts
- Grants
- Sponsorships
- Matching Gifts
- Hardware/Goods
- Software
- Services

# UNITE: NEXT STEPS





# QUESTIONS?

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# Board of Trustees

*Strategic Partnerships & Advancement Committee*

*September 27, 2023*

## **Agenda Item**

INFO-1: UCF Specialty License Plate Sales Update

## **Proposed Committee Action**

This report is intended to provide Trustees with an update of current marketing activities and the status of current UCF license plate registrations (with a goal of 40,000) and revenues.

## **Authority for Board of Trustees Action**

N/A

### **Supporting Documentation Included**

None

### **Facilitators/Presenters**

Patrick Burt, Chief Communications & Marketing Officer, UCF Advancement & Partnerships



## **INFO-1: UCF Specialty License Plate Sales Update**

### **EXECUTIVE SUMMARY**

#### **Objective**

This report is intended to provide Trustees with an update of the current marketing activities and the status of current UCF specialty license plate registrations (with a goal of 40,000) and revenues.

#### **Summary of Key Observations/Recommendations**

UCF continues to see growth in UCF specialty license plate registrations. UCF specialty license plate registrations total 36,542 as of August 1, 2023. In Fiscal Year 2022-2023, sales averaged 396 new plates and 2,114 renewals per month. Additionally, two-year registrations averaged 590 per month.

Revenue trends show an increase year over year for the UCF specialty license plate program. As of Fiscal Year 2022-2023, license plate revenue received from the state totaled \$971,781, an increase of \$57,705 over the previous fiscal year.

Compared to our SUS peers, UCF continues to increase active registered plates faster than its peers. UCF ranks third among SUS universities for active license plate registrations (Table 1). Additionally, UCF is No. 16 overall for state issued specialty license plates as of July 2023.

#### **Additional Background**

In 2016, UCF redesigned its State of Florida specialty license plate with the stacked UCF logo and began marketing to increase sales and renewals to increase revenue used for academic enhancement and scholarship, and drive brand awareness in Central Florida and the state. Each active UCF license plate registration generates \$25 annually and is paid to the UCF Foundation, Inc.

#### **Rationale**

Increasing specialty license plate registrations raises the awareness and brand of UCF within Central Florida and the state. Each registration returns \$25 back to the university in operational support. Additionally, captured registrations may also help to achieve 9 percent alumni participation by 2027.

## Implementation Plan

UCF Communications and Marketing will continue to promote UCF License Plates to target audiences and work with campus partners for promotion opportunities to continue growth towards 40,000 registrations and \$1M in annual revenue. To reach the target active registrations, the team will retain plate holders by encouraging them to renew, generating revenues over multiple years. To help promote renewals and new registrations, strategies to strengthen plate retention and boost new plate sales will be implemented.

## Resource Considerations

This informational item will not result in any additional costs to the university. Each registration returns \$25 back to the university in operational support.

## Conclusion

UCF specialty license plate registrations continues to grow, increasing annual revenue and brand visibility within Florida. With increased competition from new specialty plates created by local organizations, UCF Communications and Marketing continue to find ways to encourage sales of UCF plates to reach 40,000 active registrations generating \$1M in annual review.

**Table 1: State University Plates by Active Registrations**

State University License Plates – August 2023		Active Plates
1	University of Florida	92,597
2	Florida State University	69,643
3	University of Central Florida	36,542
4	Florida A&M University	16,336
5	University of South Florida	14,535
6	Florida International University	3,314
7	Florida Atlantic University	2,520
8	Florida Gulf Coast University	1,633
9	University of West Florida	1,589
10	University of North Florida	1,586
11	New College of Florida	588



# Board of Trustees

*Strategic Partnerships & Advancement Committee*

*September 27, 2023*

## **Agenda Item**

INFO-2: Fiscal Year 2023-2024 Feasibility Study

## **Proposed Committee Action**

This item will provide an overview to the committee on UCF Advancement & Partnerships' campaign feasibility study which will encompass data and opinions from key donors and community leaders. The data from this study is anticipated to be available in Spring 2024.

## **Authority for Board of Trustees Action**

N/A

### **Supporting Documentation Included**

Attachment A: Feasibility Study Overview

### **Facilitators/Presenters**

Rod Grabowski, Senior Vice President, UCF Advancement & Partnerships



## **INFO-2: Fiscal Year 2023-2024 Feasibility Study**

### **EXECUTIVE SUMMARY**

#### **Objective**

This item will provide an overview to the committee on UCF Advancement & Partnerships' campaign feasibility study, which will encompass data and opinions from key donors and community leaders.

#### **Summary of Key Observations/Recommendations**

- UCF Advancement & Partnerships is currently focused heavily on infrastructure building, including hiring, cultivating the internal culture and policy reviews.
- UCF Advancement & Partnerships is working with GG+A (Grenzebach Glier and Associates) on the case for support, visioning process, and donor insights.
- Feasibility study data is anticipated to be available in Spring 2024.

#### **Additional Background**

The campaign themes are in development and will be derived from UCF's Strategic Plan priorities and areas of focus.

#### **Rationale**

The UCF Strategic Plan's fourth pillar of Innovation and Sustainability includes the goal of diversifying the university's revenue and resource base to reduce financial vulnerability and provide flexible funds for strategic investment. The annual fundraising (attainment) metric is \$100M by 2027, and to increase the endowment value to \$250M.

A comprehensive fundraising campaign is critical to supporting this objective to increase resources and visibility. The feasibility study is an essential step to set priorities and assess readiness so that optimal results will be achieved. Advancement and Partnerships is actively engaged in ensuring infrastructure is in place, building the case for support, and ensuring the potential themes for the campaign align with the strategic plan.

#### **Implementation Plan**

The draft timeline includes campaign planning, lead gift development, and infrastructure building through early Fiscal Year 2025-2026. The public phase of a campaign would tentatively launch in early Fiscal Year 2025-2026; however, this is highly dependent upon dollars raised and pipeline to-date.

### **Resource Considerations**

This informational item will not result in any additional costs to the University. A successful campaign will inspire donors to give at more significant levels, share UCF's remarkable accomplishments and vision for the future.

### **Conclusion**

The Board of Trustees is encouraged to participate in scheduled volunteer trainings and engage in dialogue with Advancement and Partnerships staff throughout the progression of the campaign planning period.



# **Fiscal Year 2023-2024 Feasibility Study Overview**

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Rodney Grabowski, CFRE

Senior Vice President for Advancement & Partnerships and CEO, UCF Foundation, Inc.

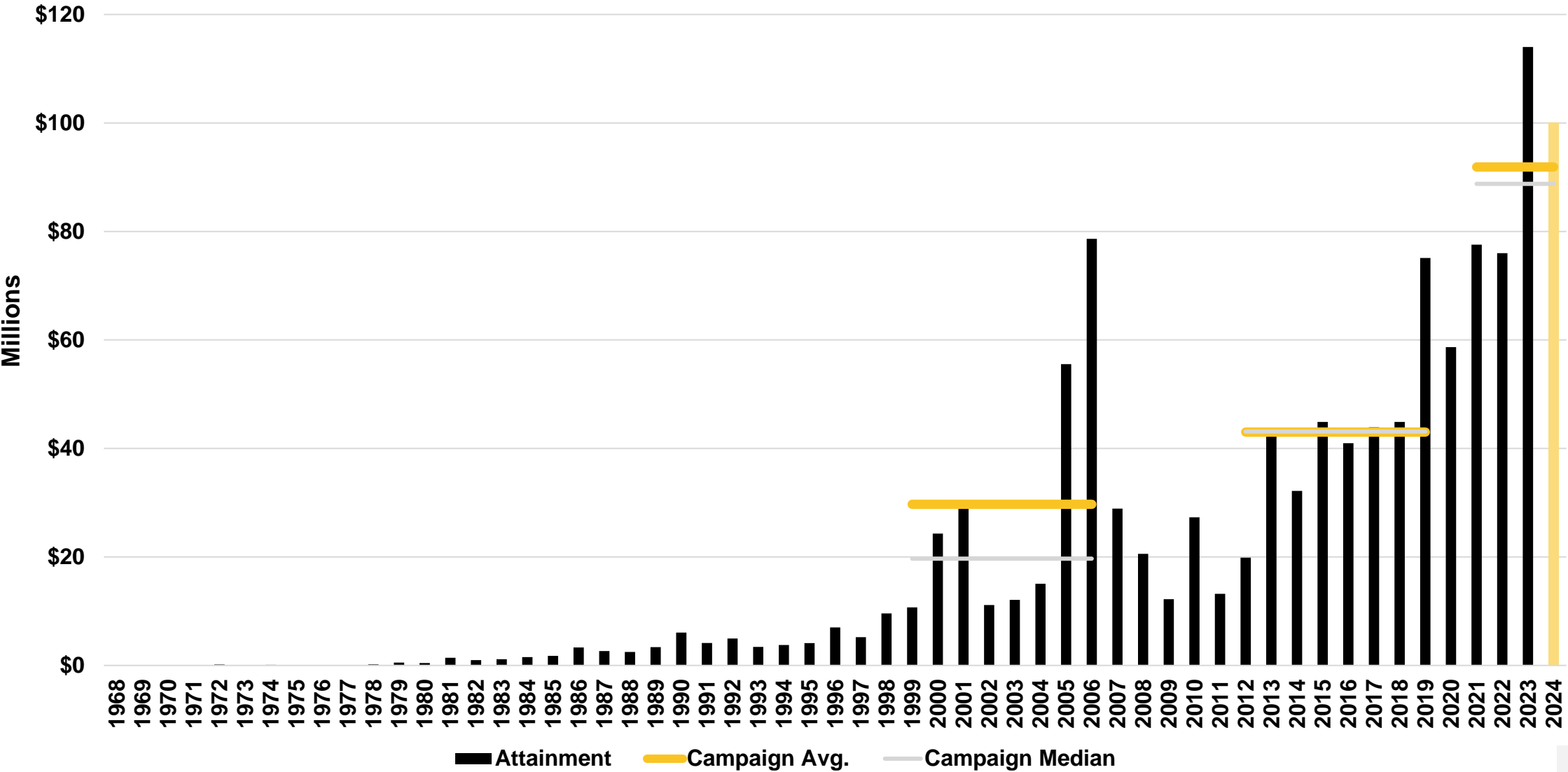
September 2023

# **CAMPAIGN PLANNING**

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# UCF GIVING HISTORY



# CAMPAIGN TIMELINE (DRAFT)



Campaign Phase	FY21	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Campaign Planning and Lead Gift Development									
Infrastructure Building									
Public Phase*									

*\*Target public launch timeframe highly dependent upon dollars raised and pipeline to-date.*

# FY24 INFRASTRUCTURE BUILDING

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- Hiring (43 open positions)
- Internal culture
- Policy review
- Stewardship programs
- Regional market development
- Major/principal gift pipeline building
- Philanthropy training programs



# CAMPAIGN FEASIBILITY STUDY

**Timeline: August 2023 through March/April 2024**

*Components Include:*

- Case for Support and Visioning Process
- Donor Interviews and Small Group Discussions
- Donor Insights Survey



# **BUILDING A CASE FOR SUPPORT**

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# STRATEGIC PLAN ALIGNMENT

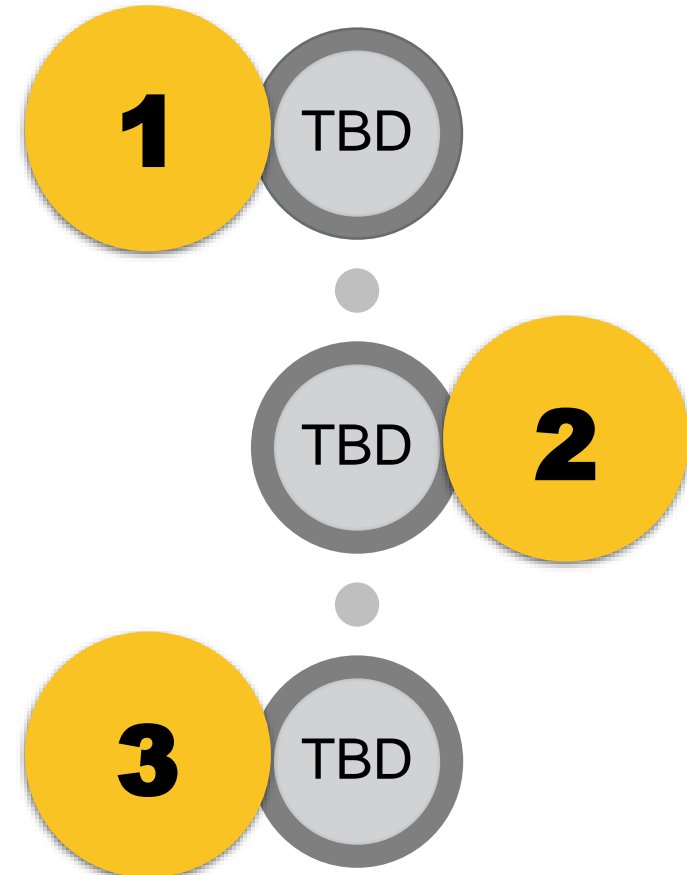
## PLAN PRIORITIES

- 1** Student Success & Well Being
- 2** Discovery & Exploration
- 3** Community & Culture
- 4** Innovation & Sustainability

## PLAN AREAS OF FOCUS

- 1** Space Technologies and Systems
- 2** Entertainment and Immersive Experiences
- 3** Health and Human Performance
- 4** Energy and Sustainability
- 5** Transformative Technologies and National Security

## CAMPAIGN THEME



# FOCUSED TRAINING FOR UNIVERSITY AND ACADEMIC LEADERS

- Begin **to change the culture of ownership and philanthropy** at the University of Central Florida.
- **Immediate Training** that will develop a common language with gift officers, senior administration and faculty, and volunteers on **how to talk about philanthropy** and an understanding on what role each plays in the philanthropic process.
- **March 21, 2023: Insight into Philanthropy**
- **June 8, 2023: Envisioning & Articulation**
- **September 14, 2023: Advanced Philanthropy Skills**



# NEXT STEPS

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## AUGUST – SEPTEMBER 2023

### Campaign Visioning and Institutional Case for Support Development:

- Internal, 1:1 and group meetings with campus leaders to gather visioning insights.
- Finalize working draft of the Institutional Case for Support (campaign vision) to be shared at small group experiences for feedback.

## OCTOBER 2023 – FEBRUARY 2024

### Small Group Discussions and Donor Interviews:

- 6-8 small group experiences for high-capacity donors and prospects to dialogue with President Cartwright on institutional vision and to offer feedback.
- 45 individual donor/prospect interviews conducted by GG+A.
- Electronic donor insights survey deployed.





# QUESTIONS?

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