

External Relations/Fund Development
Unit Annual Report
2002-2003

Personnel

Madeline Maxeiner, associate vice chancellor for external relations
and director of fund development

Vivian Heltemes, associate director of fund development

Kevin Brustuen, associate development officer

Judy Korn, public relations representative, communications

Laura Thielke, principal accounts specialist (50%)

Janell Kolden, senior administrative specialist

Intern:

Liana Aube, student phonathon coordinator

Work study students:

Lonnie Bradford, Theresa R. Johnson, Jennifer Mages, Kevin Peterson, Seth Flynn, Katherine Melgaard

Phonathon callers:

Vanessa Gravin, Nora Mogck, Megan McLennan, Dan Coursolle, Emily Tracy, Allison Jordahl, Diane Herold

Purpose:

To maximize private philanthropic support for the University of Minnesota, Morris, fostering the interest, involvement and commitment of alumni and friends for the benefit and advancement of UMM and its academic programs.

Function

The director of the office of fund development serves as a liaison between the University of Minnesota Foundation and the UMM campus. Primary responsibilities include planning, developing and implementing a comprehensive fund raising program at UMM. Duties include identifying, cultivating and soliciting prospective donors for annual, major and planned gifts, and stewarding donors and their gifts to the University.

Narrative and Statistics

A. Capital Campaign

UMM has completed its first comprehensive capital campaign, conducted in concert with the entire University of Minnesota system, and covering the period July 1, 1996-June 30, 2003. During Campaign Minnesota, UMM achieved a fundraising total of almost \$9.6 million as compared with its formal goal of \$6 million. Campaign ending as of June 30, 2003, is \$9,593,676 in commitments, including gifts, pledges and bequests. The total includes \$1 million in grants and foundation gifts in support of UMM programs.

Highlights include:

- Surpassed UMM's Campaign Minnesota goal by over 60%.
- Campaign Minnesota gifts included over \$3.6 million for scholarships, over \$2.5 million for academic program support, and nearly \$1.4 million for faculty and staff support.
- Increased the total balance in UMM's endowment funds by 314%.
- Increased average yearly giving to UMM by 400%.
- Membership in the UMM Presidents Club has grown 220% during the Campaign.
- Tripled the number of scholarship funds and the dollars available to UMM students in the form of scholarships, honors and awards.
- Created a Rural Students Scholarship Fund, launched with gifts, pledges, and testamentary commitments of over \$1.3 million.
- Funded UMM's first endowed professorship, the UMM Distinguished Visiting Professorship in the Liberal Arts, with \$1 million contributed through gifts from Elizabeth Blake and matching funds from the Permanent University Fund endowment.
- In partnership with our community and the legislature, built a \$5 million Regional Fitness Center which is supported in part by continued yearly giving to the RFC Partnership Fund.
- Established the annual Barber Lecture with a gift from Laird Barber and Dorothy Barber in memoriam.
- Received LaFave House from Edward and Patricia Paul LaFave.

Major gifts and pledges received during campaign counting period:

1 at \$750,000
3 at \$500,000
2 at \$300,000
1 at \$250,000
1 at \$222,000
1 at \$190,000
1 at \$163,000
2 at \$150,000
1 at \$106,000
9 at \$100,000

1 at \$93,000
1 at \$82,000
1 at \$79,000
1 at \$75,000
5 at \$50,000
2 at \$45,000
3 at \$28,000
1 at \$27,000
7 at \$25,000
1 at \$24,000
1 at \$21,000
6 at \$20,000
1 at \$17,000
2 at \$16,000
2 at \$15,500
3 at \$15,000
1 at \$12,000
1 at \$10,500
27 at \$10,000

The UMM Campaign Minnesota volunteer executive committee members were:

John Dayton, co-chair
Robert Gandrud, co-chair
Ed Caillier, alumni leadership committee co-chair
Ron Jost, alumni leadership committee co-chair
Linda Oslund, alumni leadership committee co-chair
Les Bensch, WCSA leadership committee chair
Warren Anderson, Morris and regional leadership committee co-chair
Bud Rentz (deceased), Morris and regional leadership committee co-chair
Glen Robinson, parent leadership committee co-chair
Oree Robinson, parent leadership committee co-chair
Jane Kill, campus leadership committee co-chair
Jooinn Lee, campus leadership committee co-chair

On Earth Day, April 22, University of Minnesota faculty and staff were recognized for their contributions to the University and their private financial giving through Campaign Minnesota. Each campus hosted their own gathering under one common theme: "You are the roots that help us grow." UMM faculty, staff and retirees attended a tree planting ceremony on the campus mall. A plaque commemorating the significant contributions faculty, staff and retirees have made to UMM through their private Campaign Minnesota gifts was placed near the tree. The program also included comments by Faculty and Staff Volunteer Committee Co-chairs Jane Kill and Jooinn Lee, Chancellor Sam Schuman and Maddy Maxeiner.

B. Alumni Annual Giving Program

The UMM Annual Giving program kicked off with a direct mailing piece done in conjunction with the University of Minnesota Foundation. It was unique in that it was sent to all UMM alumni and friends, nearly 11,000 addresses.

Phonathon calling to UMM alums began by calling Lybunts (donors who gave last year) on October 1, using a new computerized system called Dialvision. About 2500 UMM alums were contacted through our phonathon, resulting in 670 pledges and \$37,000 in pledges. This is down from the previous year and could be attributed to learning and using Dialvision. Also these numbers do not include gifts made by “Will Consider” alums, who asked that pledge forms be sent to them, and they’d decide later what their gift will be. Dialvision is licensed by the University of Minnesota Foundation, which allows UMM to use the Foundation license to establish four calling stations at UMM.

The Annual Giving program received \$93,020 in gifts from 1285 donors.

It’s difficult to compare from fiscal year 2003 to previous years, since we are using DMS database system from the University of Minnesota Foundation this year when in previous years we reported numbers from our in house database system. Numbers cannot be compared accurately from this year to past years, since in the past we used different measurements than the Foundation.

C. Major gifts and pledges received for fiscal year 2003

- 1 at \$500,000
- 1 at \$150,000
- 1 at \$100,000
- 1 at \$30,000
- 1 at \$28,000
- 2 at \$25,000
- 1 at \$20,000

D. Planned Giving

Three new members were enrolled in the Heritage Society recognizing future gift commitments to UMM.

Selected donors received a letter and brochure outlining the benefits of charitable gift annuities.

UMM hosted a Crescendo gift planning teleconference for planned giving professionals in the life insurance, banking, and investment business on May 1.

E. Scholarship and Award Support

Significant support was received for the Morris Endowed Scholarship.

Significant support was received for the Rural Students Scholarship.

Two new scholarships were established. The Stacy Polzin McIntyre Memorial Scholarship will be awarded to freshmen who are active in community, school and church activities. The Florence Eystad Gahm Memorial Scholarship will be awarded to UMM juniors majoring in English with preference given to secondary education teachers.

One new award was established. The Minge Internship Award provides financial support for educational opportunities at the federal level. Preference is given to internship participants who integrate the study of peace, justice, conservation, the environment, rural affairs or similar issues.

F. Special Fundraising Projects

A new award was established with gifts given in Mimi Frenier's honor by friends, colleagues, alumni and students. The Mimi Frenier Award in Women's Studies recognizes Frenier's contributions to the University of Minnesota, Morris. It will be awarded annually beginning in the spring of 2004 to a women's studies major in recognition for high academic achievement and civic activism.

Friends, family, colleagues, alumni and students joined together to surprise Dr. Jim "Doc" Carlson with a special thank you on the occasion of Jazz Fest's 25th anniversary. A total of \$5,000 was raised and donated in Doc's honor to the Humanities Fine Arts Phase III Fund.

The Rodney A. Briggs Library Associates group was organized as a friend-raising and fundraising association. The UMM Fund Development Office will assist the group with their fundraising and communication projects. A brochure and solicitation material drafts have been prepared.

Friends of LaFave House was organized and twenty-two volunteers have agreed to serve as honorary and advisory committee members. The friendship group's purpose is to promote LaFave House use, and through financial support, contribute to its enhancement. LaFave House materials including letterhead, solicitation materials, invitations, notecards and brochures were created.

UMM Phi Mu Delta alumni are raising funds for the establishment of a new scholarship, the Phi Mu Delta, Gamma Epsilon Chapter Scholarship. The scholarship recipient will be chosen in regard to service, scholarship and social contributions. Recipients will be juniors or seniors with priority given to students whose parents or grandparents attended UMM.

Friends and family of Clyde Johnson and UMM music alumni were included in a fund raising effort for the Clyde Johnson Music Scholarship Fund.

Fundraising efforts to raise the balance of the William "Bill" Stewart Scholarship continued during fiscal year 2003. The goal is raise enough funds to award four scholarships to minority students who meet the scholarship criteria.

A historical bench, designed by David Poppe based on a WCSA photo, is now available as a memorial giving opportunity. The memorial benches will be built by Dan Payne. The lumber for the first memorial benches, was harvested and donated by Peter Orr.

All science and mathematics alumni received a solicitation letter and brochure introducing a new giving opportunity. The Latterell Memorial Visiting Alumnus Program was established in memory of Professor Latterell, who was a chemistry professor at UMM from 1967 until his retirement in 1998. The program creates opportunities for current science and mathematics students to interact with alumni and learn more about the enormous breadth of career options that will be available after graduation.

Area alumni and retirees were invited, via a postcard designed and printed by Jim Gremmels, to the 2003 Spring Dance Fundraiser at the Lakeside Ballroom in Glenwood on March 29, 2003. The event serves as a fundraiser for the John Q. Imholte Endowed Scholarship and the Humanities Phase III Project.

G. Donor Stewardship/cultivation events

The second annual UMM Garden Party was held on August 12, 2002, to celebrate the continuing success of Campaign Minnesota and to thank UMM donors and supporters. The festive occasion served as the inaugural major event for LaFave House.

On August 13, 2002, Stahler family and friends, and representatives of the UMM community gathered to dedicate a parcel of land gifted to UMM by Bonita Giberson Stahler '72 and the late Judge Thomas Stahler '41 (U of M) to be used as an environmental learning laboratory.

Scholarship donors and recipients were honored at a scholarship banquet held October 8, 2002, in Oyate Hall.

Donors of privately funded awards were invited to the 2003 Honors and Awards Ceremony held May 9, 2003, in the HFA Recital Hall.

UMM Presidents Club members were included in all University of Minnesota Foundation giving society events.

A faculty, staff, retiree Campaign Minnesota donor thank you event that included a tree planting ceremony was held at April 22, 2003, on the campus.

H. Regional Fitness Center

Gift and pledge payments for the Regional Fitness Center totaled \$44,205 for FY03.

I. Communications

Jane Eaves, partner, and Mark Gambaiana, consultant, of Gonser Gerber Tinker Stuhr conducted a UMM Communications Audit.

Three issues of *Profile* were sent to all parents, alumni, donors, faculty, staff, retirees and friends of UMM.

The 2001-2002 Annual Honor Roll of Donors was mailed to all UMM alumni, friends, faculty, staff and retirees in October 2002.

External Relations web pages were redesigned and updated. News release and weekly bulletin upload technical features were incorporated. LaFave House, Special Events and Media Assistance pages were added to the earlier information that includes: Alumni Relations, Donor Relations, University Relations, and External Relations personnel.

Information sheets on fund development topics were created.

Campaign Minnesota related news releases were written by Fund Development and distributed by University Relations.

All UMM donors and supporters received a holiday card that featured a photograph of the Herman Iron Pour taken by Humanities Division Chair and Professor of Studio Art Jenny Nellis.

J. Several fund development projects and people received U-wide media attention:

Elizabeth Blake, professor emeritus of French and former vice chancellor for academic affairs and dean, was featured in the 2002 U of M Foundation Annual Report. The article highlighted the Campaign Minnesota gift and bequest she has given to fund a visiting professorship.

The Otter Tail Power Company's TailWinds program and UMM scholarship were highlighted in the 2002 summer issue of *Campaign Legacy*.

Andy and Dian Lopez, faculty donors, were featured in Campaign Minnesota articles in both *M* and *Kiosk*.

Jill Evans '02 and Amelia Chouravong '04, scholarship recipients, were featured in the U of M Foundation's "thank you" wraps.

K. Other Activities

1. Legislative Relations: A sample legislative letter, talking points information sheet regarding the U of M budget, tips for communicating information sheet and a return postcard were created and sent to UMM alumni who had participated in lobbying efforts in previous years. The information was also shared with the MCSA lobbying group.

UMM celebrated the final stage of the Morris Science Project with the dedication of the Science Building— West Wing during Homecoming 2002. Special campus guests included: Representatives Dallas Sams, Connie Bernardy and Torrey Westrom; Senator George Cassell and Mayor Carol Wilcox.

2. The Integrated Marketing committee completed a “facts and figures” project that identified and defined the information that needed to be consistently and correctly communicated to our external audience. The finalized “facts and figures” document was uploaded to the UMM web site as both a downloadable document and online resource, and promoted to the campus community.
3. The UMM External Relations office completed the process of merging UMM database information with the University of Minnesota Foundation DMS system.
4. Maddy Maxeiner presented a video, produced by UMM Media Services, at the West Central School of Agriculture All-School Reunion banquet that featured UMM students from the area and highlighted their UMM accomplishments and activities.

L. Fiscal Year 2003 Contributions

Total production activity for fiscal year 2003 including gifts, pledges and future gifts was \$1,212,522.

Plans for 2003-2004

- A. Continue strong major gift fund raising
- B. Increase visibility
- C. Celebrate our continued success