Gift Sources

Individuals
- Alumni
- Friends
- Parents
- Grateful Patients & Clients

Corporations & Foundations
Associations
Prospect Management

• Prospect Management

• Driven by Development Cycles

• Fundraising Initiatives Linked to Development Strategies

1. Qualify
2. Plan
3. Cultivate
4. Ask
5. Close
6. Thank
Who are Penn Alumni?

- 289,000 alumni - 63% men, 37% women
- 52% undergraduate alumni
- 62% of alumni reside in 10 U.S. cities, 8% outside the U.S.
- 62% have Arts & Sciences and/or Wharton degrees
- 51% graduated in last 20 years
- Over next ten years, most demographics will change slowly; growth in minority representation
Non-Financial and Engagement Goals

• Strengthen **campus and regional activities** that engage alumni, students, parents, and friends and provide increased access to Penn’s vast **academic resources**.

• Build on the success of **alumni class and affinity group programming**, creating new ways for alumni to connect with each other.

• Expand **career networking opportunities** for alumni and students.

• Grow the number of alumni who support Penn’s commitment to educational excellence through their **annual gifts**.

• Increase the number of individuals who create lasting legacies at Penn through their planned gifts and **Harrison Society participation**.

• Deepen **student awareness and involvement** in the full range of development and alumni relations activities.
Campaign Non-Financial Goals: Major Program Launches

- yPenn
- Office Hours
- Salon Series
- Quaker Exchange
- Penn Spectrum
- Engaging Minds
- Excellence to Eminence Tour
- Penn To You
- Penn Traditions
- Penn Cares
- Penn Quotient
- PRLC/FACTS
- Alumni Weekend

- Homecoming & Arts
- Penn Alumni Winter Meeting
- GAN Clubs Conference
- Penn Alumni Blog
- Family Programs
- SIGs
- Class Elections
- Alumni Yellow Pages
- TCPW Networking Receptions
- Social Media
- Gazette Circulation
- Alumni Directory
- Alumni Relations Group
Regional

- Currently 129 Clubs
- 54 International Clubs
- Club Leadership Training
- Operating Manuals

- Secondary School Committees
- Greater assistance and support for on-line tools
Impact of the Making History Campaign

• Campaign Total: $4.3 billion (326,000+ donors)
  – Undergraduate Financial Aid: $366 million
  – Graduate and Professional Financial Aid: $286 million (788 scholarships)
  – Faculty, Directors, Curators, Coaches: $573 million
  – Programs and Research: $2.02 billion
  – Buildings and Renovations: $753 million

• Increased Engagement of Penn Community:
  – Attendance for major alumni events and programs has risen by 66%
  – Young alumni participation increased by 89% over five years
# Making History Giving Stratification

<table>
<thead>
<tr>
<th>Level</th>
<th>Donors Required</th>
<th>Total Required</th>
<th>Gifts (Individual Gifts)</th>
<th>Donors* (cumulative gifts)</th>
<th>Donors Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100,000,000 and above</td>
<td>3</td>
<td>$300,000,000</td>
<td>2</td>
<td>2</td>
<td>$439,157,955</td>
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<tr>
<td>$75,000,000 - $100,000,000</td>
<td>3</td>
<td>$225,000,000</td>
<td>0</td>
<td>2</td>
<td>$161,248,078</td>
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<tr>
<td>$50,000,000 - 75,000,000</td>
<td>10</td>
<td>$500,000,000</td>
<td>1</td>
<td>2</td>
<td>$107,871,454</td>
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<tr>
<td>$25,000,000 - 50,000,000</td>
<td>16</td>
<td>$400,000,000</td>
<td>8</td>
<td>7</td>
<td>$213,347,069</td>
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<tr>
<td>$10,000,000 - 25,000,000</td>
<td>40</td>
<td>$400,000,000</td>
<td>41</td>
<td>44</td>
<td>$651,980,695</td>
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<td>$5,000,000 - 10,000,000</td>
<td>60</td>
<td>$300,000,000</td>
<td>69</td>
<td>77</td>
<td>$494,891,969</td>
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<tr>
<td>$2,500,000 - 5,000,000</td>
<td>100</td>
<td>$250,000,000</td>
<td>99</td>
<td>130</td>
<td>$435,186,915</td>
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<tr>
<td>$1,000,000 - 2,500,000</td>
<td>250</td>
<td>$250,000,000</td>
<td>497</td>
<td>449</td>
<td>$651,736,117</td>
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<td>$500,000 - 1,000,000</td>
<td>350</td>
<td>$175,000,000</td>
<td>419</td>
<td>426</td>
<td>$284,186,931</td>
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<td>$250,000 - 500,000</td>
<td>700</td>
<td>$175,000,000</td>
<td>865</td>
<td>700</td>
<td>$233,697,278</td>
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<tr>
<td>$100,000 - 250,000</td>
<td>1,500</td>
<td>$150,000,000</td>
<td>2,773</td>
<td>1,594</td>
<td>$231,604,463</td>
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<td>$50,000 - 100,000</td>
<td>1,800</td>
<td>$90,000,000</td>
<td>3,655</td>
<td>1,511</td>
<td>$100,749,171</td>
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<td>$25,000 - 50,000</td>
<td>3,500</td>
<td>$87,500,000</td>
<td>5,842</td>
<td>2,239</td>
<td>$73,397,860</td>
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<tr>
<td>$0 - 25,000</td>
<td>MANY</td>
<td>$197,500,000</td>
<td>981,065</td>
<td>301,798</td>
<td>$223,834,750</td>
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<tr>
<td>All Donors</td>
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<td>$3,500,000,000</td>
<td>995,336</td>
<td>308,981</td>
<td>$4,302,890,707</td>
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</tbody>
</table>

*Hard-credit donor only
## Development Growth

### Core Priorities

<table>
<thead>
<tr>
<th>Priority</th>
<th>Annual Average Total</th>
<th>Pre-Campaign</th>
<th>Campaign</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Student Aid</td>
<td></td>
<td>$25.0</td>
<td>$46.1</td>
<td>84.4%</td>
</tr>
<tr>
<td>Buildings &amp; Renovations</td>
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<td>$43.7</td>
<td>$76.7</td>
<td>75.5%</td>
</tr>
<tr>
<td>Graduate &amp; Professional Student Aid</td>
<td></td>
<td>$22.0</td>
<td>$32.2</td>
<td>46.4%</td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
<td>$47.7</td>
<td>$67.4</td>
<td>41.3%</td>
</tr>
<tr>
<td>Programs &amp; Research</td>
<td></td>
<td>$166.7</td>
<td>$235.0</td>
<td>41.0%</td>
</tr>
</tbody>
</table>
There were 2,178 individuals who gave $250K or more cumulatively to the campaign

- Over 75% of these gave to at least two of the six campaign priority areas and 48% gave to three or more
- Over 57% of these donors supported at least two different Schools and Centers

### Priority Giving

<table>
<thead>
<tr>
<th>Donors to</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Priority</td>
<td>24%</td>
</tr>
<tr>
<td>2 Priorities</td>
<td>27%</td>
</tr>
<tr>
<td>3 Priorities</td>
<td>26%</td>
</tr>
<tr>
<td>4 Priorities</td>
<td>15%</td>
</tr>
<tr>
<td>5 Priorities</td>
<td>6%</td>
</tr>
<tr>
<td>6 Priorities</td>
<td>1%</td>
</tr>
<tr>
<td>Total Donors</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Area Giving

<table>
<thead>
<tr>
<th>Donors to</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Area</td>
<td>42.9%</td>
</tr>
<tr>
<td>2 Areas</td>
<td>25.3%</td>
</tr>
<tr>
<td>3 Areas</td>
<td>15.6%</td>
</tr>
<tr>
<td>4 Areas</td>
<td>8.5%</td>
</tr>
<tr>
<td>5 Areas</td>
<td>3.8%</td>
</tr>
<tr>
<td>6 Areas</td>
<td>2.2%</td>
</tr>
<tr>
<td>7 or more Areas</td>
<td>1.7%</td>
</tr>
<tr>
<td>Total Donors</td>
<td>100%</td>
</tr>
</tbody>
</table>
Commitment Stratification
FY 2014

$ Millions

- 2007: 450
  - <$100k: 116.2
  - $100k+: 120.2
  - $1 million+: 107.9
  - $5 million+: 105.5
- 2008: 557
  - <$100k: 120.7
  - $100k+: 128.6
  - $1 million+: 119.4
  - $5 million+: 98.1
- 2009: 398
  - <$100k: 105.4
  - $100k+: 124.1
  - $1 million+: 98.1
  - $5 million+: 107.9
- 2010: 403
  - <$100k: 107.4
  - $100k+: 124.1
  - $1 million+: 119.4
  - $5 million+: 107.9
- 2011: 627
  - <$100k: 116.2
  - $100k+: 120.2
  - $1 million+: 107.9
  - $5 million+: 105.5
- 2012: 482
  - <$100k: 110.9
  - $100k+: 121.9
  - $1 million+: 110.0
  - $5 million+: 115.7
- 2013: 580
  - <$100k: 114.9
  - $100k+: 130.6
  - $1 million+: 195.4
  - $5 million+: 110.0
- 2014: 469
  - <$100k: 82.0
  - $100k+: 126.3
  - $1 million+: 141.7
  - $5 million+: 118.8

As of 6/30/14
PENN Compact 2020

Inclusion is created through Increasing Access

Innovation is driven by Integrating Knowledge

Impact is realized by Engaging Globally, Nationally & Locally
Three PENN Compact 2020 University Initiatives that span FY15 - FY19, build on the foundation begun with the Making History Campaign, and represent our highest priorities.
Raise $300 million in the next 5 years for faculty support that will bring our total to over $900 million to attract and retain one of the world’s best assembly of faculty and staff.
Faculty Initiative
Fundraising Target

Faculty Commitments

$573.4

$657.9*

*Post-campaign through 6/30/2014

Campaign 
Post-Campaign 
Projections
Presidential Initiative Professorships

- Donor-Named PIK Professorships ($5M)
  - $3.75 million new gift commitment + $1.25 million match from the challenge fund

- Donor-Named Distinguished Professorships ($3M)
  - $2.25 million new gift commitment + $750,000 match from the challenge fund

- Donor-Named Presidential Professorships ($1.5M)
  - $1 million new gift commitment + $500,000 match from the challenge fund
Raise $350 million in the next 5 years for student aid that will bring our total to over $1 billion to support the world’s brightest and most talented financially deserving students.
Student Aid
Undergraduate Focus

• Raise $240 million in 5 years to bring our total to over $600 million for Undergraduate Financial Aid

• Critical to supporting PENN’s commitment to no-loan financial aid support of undergraduate students

• Began with the Presidential Initiative in 2014

• Builds on the momentum of the campaign
Graduate & Professional Student Aid Focus

- Raise $110 million in 5 years to bring our total over $400 million for Graduate & Professional Student Aid

- Critical to supporting PENN’s ability to attract and support the brightest graduate and professional students

- Supports research, teaching, and service

- Builds on the momentum of the campaign
Graduate & Professional Student Aid Fundraising Target


Millions

Graduate & Professional Aid Commitments

- $0
- $50
- $100
- $150
- $200
- $250
- $300
- $350
- $400

- 285.8
- 322.1*

*Post-campaign through 6/30/2014
A university-wide initiative linking the engagement strategies of every school and center will create a powerful illustration of Penn’s commitment to building the value and increasing the connection of our community.
Alumni & Community Engagement Initiative.

Engagement:
- Reunions
- Event Attendance
- Volunteers
- Young Alumni
- Affinity/ Diversity
- Active Penn Clubs
- Harrison Society
- Alumni Education
- Student Leaders
- Online Connection
- Alumni Interview
- Program
Penn Compact 2020
Initiatives

Programs & Research
Unrestricted
Student
Faculty
Engagement
Capital
Moving Forward

- University Vision/Agenda
- School & Center Priorities
- Case for Support & Gift Opportunities
- Donor Capacity
- Platform for Engagement
Penn Students
Ongoing Capital Projects
New College House site
New College House
The Henry A. Jordan Medical Education Center
The Henry A. Jordan Medical Education Center Lobby
Neural and Behavioral Sciences Building
Penn Wharton China Center
Development and Alumni Relations
The Past, The Present, The Future

John H. Zeller
Vice President, Development and Alumni Relations

December 9, 2014