CREATIVE STRATEGIES FOR UNRESTRICTED GIVING

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Definitions

- **Restricted Gifts**: Donations given for a particular project or area, i.e., research program, endowed chair in leukemia research.

- **Unrestricted Gifts**: Donations given for the broad goals of the institution, not a specific project or program.
FY09 Average of Unrestricted to Restricted Gifts by Center Type

- **Matrix (University)**
  - Average of Restricted: $3,943,924
  - Average of Unrestricted: $11,688,382

- **Free Standing**
  - Average of Restricted: $47,079,789
  - Average of Unrestricted: $20,119,335

- **CHS/Hospital**
  - Average of Restricted: $14,258,283
  - Average of Unrestricted: $2,596,134

- **Basic**
  - Average of Restricted: $26,750,000
  - Average of Unrestricted: $2,783,955
FY09 Average of Unrestricted to Restricted Gifts by Total Raised

<table>
<thead>
<tr>
<th>Category</th>
<th>Average of Unrestricted</th>
<th>Average of Restricted</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$5 million</td>
<td>$55,672,017</td>
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<tr>
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Three-Year Comparison of Restricted to Unrestricted Gifts

2008
- Average Restricted: $24,870,457 (79%)
- Average Unrestricted: $6,553,538 (21%)

2009
- Average Restricted: $25,847,199 (79%)
- Average Unrestricted: $6,837,672 (21%)

2010
- Average Restricted: $7,841,144 (29%)
- Average Unrestricted: $19,087,476 (71%)

Comparison:
- 2008: 79% restricted, 21% unrestricted
- 2009: 79% restricted, 21% unrestricted
- 2010: 29% restricted, 71% unrestricted
Challenges to Getting Unrestricted Gifts

- Most donors like to give for specific projects – restricted funds, capital projects, endowed chairs and postdoctoral fellowships.

- Donors want to see specific results of their gifts.

- Donors often want to get recognition through named facilities – buildings, lecture halls, conference rooms – and they want to support the project involved.
Sources of Unrestricted Gifts

- Direct Mail
- Annual Funds for general support
- Board Giving for Highest Institutional Priorities as determined by the Director or President
- President’s Advisory Council gifts and Leadership Society support
Sources of Unrestricted Gifts (cont.)

- Challenge gifts for Institutional Priorities
- Events sponsored by the institution for general support
- Venture Funds for broad institutional goals
- Estate Gifts
  -- often resulting from a history of support for direct mail and annual giving goals
Why are Unrestricted Funds so Valuable?

- They provide greater flexibility for Institutional leadership
- They sustain the infrastructure of the institution
- They enable leadership to initiate new projects that donors may not support at first
Unrestricted Funds (cont)

- They can help support fundraising costs and public outreach initiatives.

- More and more institutions measure fundraising performance on growth in percent of giving from unrestricted sources.
Examples of Innovative Initiatives to Raise Unrestricted Support

- Prostate cancer Grateful Patient Program as window to support basic science and translational research.

- Board fundraising challenge initiatives to donors closest to institution with highest capabilities.
Initiatives to Raise Unrestricted Support (cont)

- Direct Mail Initiatives that focus on Planned Giving and Estate Gifts
  -- Gift Annuities
  -- Trusts
  -- Bequests

- Auto Donation Programs with vendors
Initiatives to Raise Unrestricted Support (cont)

- Special Events that raise Unrestricted Funds
- “Pilot Research Fund” supports competing research initiatives
- Donations solicited by Faculty Senate and funded through Payroll deductions
Future Initiatives

- Utilization of Social Media to raise support for unrestricted gifts
- Linked to institutional website
- Emails to Grateful Former Patients
- Special Funding Initiatives solicited online