FACULTY SENATE PRESENTATION

LIL O’ROURKE, President, URIFAE
Claire Gadrow, Vice President For Development, URIFAE
Adam Quinlan, Chief Financial Officer, URIFAE

April 16, 2020
Advance URI Through Raising Funds and Connecting with Key Stakeholders
• URIFAE Chairman of the Board of Directors
Alfred Verrecchia '67, M.B.A.'72, H'04

• Retired Hasbro Chairman & CEO
URIFAE
Governance

Executive Committee
Board of Directors

Alumni Engagement Council
Audit Committee
Development/Campaign Committee
Finance Committee
Governance & Nominating Committee
Investment Committee
Marketing & Communications Committee

Young Alumni Council
Alumni of Color Network
Women’s Council

The UNIVERSITY of RHODE ISLAND
FOUNDATION & ALUMNI ENGAGEMENT
VOLUNTEER LEADERS DAY
ENDOWMENT

PORTFOLIO VALUE

IN MILLIONS

$175
$150
$125
$100
$75
$50
$25
$0

2016  2017  2018  2019  2020

106  119  139  145  157

FY 2020 market value of $157.3 million as of 12/31/19.

ANNUAL ENDOWMENT PAYOUT

IN MILLIONS

$5.0
$4.0
$3.0
$2.0
$1.0
$0

2016  2017  2018  2019  2020

3.7  3.7  3.8  4.2  4.6

The annual payout figure is based on a rolling 3-year average using 12/31 values.
Campaign for URI:

Planning & Due Diligence phase: 7.1.16-12.31.17

Launched Leadership Phase: January 2018

Launch Public Phase: Fall 2020
SETTING CAMPAIGN PRIORITIES:

IDENTIFICATION PROCESS:
- October 2017: Campaign Prospectus
- Fall 2017-Summer 2018: Deans and unit heads formulate development priorities
- September 2018: Preliminary campaign themes and priorities discussed with campaign committee
- October 2018: UIRF meetings with deans and unit heads
- November-December 2018: UIRF meetings with president and provost
- Early January 2019: Campaign priorities working document reviewed by campaign co-chairs and Richard Harrington
- January 25, 2019: Campaign priorities working document to be reviewed by campaign committee

THE UNIVERSITY OF RHODE ISLAND FOUNDATION & ALUMNI ENGAGEMENT
CAMPAIGN PRIORITIES

Transformative Faculty Leadership
- Endowed Faculty Professorships and Chairs
- Cluster Hires of Faculty in High Profile Areas

The URI Learning Experience
- Internships and Experiential Learning
- Student Leadership Development and Co-Curricular Opportunities
- Athletics
- Student Health and Wellness
- Discovery Infrastructure

Student Access
- Undergraduate Scholarships
- Graduate Scholarships and Fellowships

Innovative and Distinctive Programs
- Academic Health Collaborative
- Global Opportunities
- International Programs
- Centers and Institutes

Strategic Opportunities
- Annual Fund
- Business Partnerships and the Innovation Campus
- Critical Immediate Opportunities
- Future Opportunities
Working Goal: $250M

Raised to Date: $172.8M
Goals of Campaign:

• Exceed Fundraising Goal
• Engage Volunteers
• Prepare URI for next Campaign
CAMPAIGN LAUNCH: anticipated Fall 2020

ANTICIPATED FALL 2020

- All-inclusive celebratory event on the Quad- exclamation point on Public Campaign!
- To Celebrate Rhody Spirit, Inspire, Engage
- Alumni Family Weekend (and DAA weekend) to leverage best time on campus built-in audience and infrastructure
- Include campus experiences
- Opportunity to steward major gift and annual fund donors more personally
- Engage Faculty and staff
CAMPAIGN PROGRESS AS OF April 13, 2020

THE UNIVERSITY OF RHODE ISLAND
FOUNDATION & ALUMNI ENGAGEMENT

The Planning Phase of the "The Campaign for the University of Rhode Island" covered July 1, 2010 through December 31, 2014. The Leadership Phase began on January 1, 2015. The Campaign has an anticipated end date of June 30, 2024. Matching gifts are included in Outright Gifts.

$250M Goal
$172.81M Raised to Date

Campaign Commitments by Gift Type
as of April 13, 2020

Outright Gifts $57,051,410
Deferred $46,051,475
Pledges $98,932,513
Overall Summary $172,856,406

Gift Type
Total
Pledges $98,932,513
Outright Gifts $57,051,410
Deferred $46,051,475
Overall Summary $172,856,406

**CONFIDENTIAL**
The Planning Phase of the "The Campaign for the University of Rhode Island" covered July 1, 2015 through December 31, 2017. The Leadership Phase began on January 1, 2018. The Campaign has an anticipated end date of June 30, 2024. Gift Purpose is as reported to the Council for Aid to Education (CAE) for their annual Voluntary Survey for Education (VSE), and as reported in the URI Foundation annual report.

*** CONFIDENTIAL ***
**Campaign Progress As of April 13, 2020**

The University of Rhode Island Foundation & Alumni Engagement

### Campaign Commitments by Donor Type

<table>
<thead>
<tr>
<th>Donor Type</th>
<th>Donors</th>
<th>Current Gifts</th>
<th>Pledges</th>
<th>Deferred Gifts</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Alumni</td>
<td>11,624</td>
<td>$17,092,900</td>
<td>$34,353,305</td>
<td>$27,333,314</td>
<td>$78,849,079</td>
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<tr>
<td>Graduate Alumni</td>
<td>2,073</td>
<td>$886,929</td>
<td>$1,190,090</td>
<td>$2,447,541</td>
<td>$4,469,556</td>
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<tr>
<td>Non-Degree Alumni</td>
<td>94</td>
<td>$288,111</td>
<td>$110,042</td>
<td>$22,015</td>
<td>$420,208</td>
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<tr>
<td>Spouse of Alumni</td>
<td>1,051</td>
<td>$24,245,475</td>
<td>$21,590,195</td>
<td>$11,723,894</td>
<td>$38,920,575</td>
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<tr>
<td><strong>Total Alumni</strong></td>
<td>14,898</td>
<td>$24,473,372</td>
<td>$37,173,393</td>
<td>$41,743,766</td>
<td>$123,390,832</td>
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<tr>
<td>Students</td>
<td>738</td>
<td>$12,949</td>
<td>$156</td>
<td>$72,000</td>
<td>$75,705</td>
</tr>
<tr>
<td>Parents</td>
<td>2,497</td>
<td>$749,527</td>
<td>$190,042</td>
<td>$383,000</td>
<td>$1,222,969</td>
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<tr>
<td>Faculty/Staff</td>
<td>905</td>
<td>$770,384</td>
<td>$313,145</td>
<td>$84,430</td>
<td>$1,173,131</td>
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<tr>
<td>Other Individuals</td>
<td>3,927</td>
<td>$3,373,387</td>
<td>$4,470,441</td>
<td>$2,023,024</td>
<td>$10,877,852</td>
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<tr>
<td><strong>Total Non-Alumni</strong></td>
<td>7,926</td>
<td>$8,366,259</td>
<td>$4,962,734</td>
<td>$2,000,261</td>
<td>$17,679,145</td>
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<tr>
<td>Foundations</td>
<td>82</td>
<td>$10,154,028</td>
<td>$5,027,735</td>
<td>$0</td>
<td>$15,181,763</td>
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<td>Corporations</td>
<td>985</td>
<td>$13,720,205</td>
<td>$1,017,500</td>
<td>$0</td>
<td>$14,737,705</td>
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<td>Other Organizations</td>
<td>105</td>
<td>$1,281,304</td>
<td>$575,060</td>
<td>$469,446</td>
<td>$2,359,752</td>
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<tr>
<td><strong>Total Organizations</strong></td>
<td>1,232</td>
<td>$25,171,596</td>
<td>$6,065,285</td>
<td>$493,448</td>
<td>$32,330,330</td>
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<td><strong>Grand Total</strong></td>
<td>23,136</td>
<td>$57,901,418</td>
<td>$68,892,513</td>
<td>$86,021,475</td>
<td>$172,803,406</td>
</tr>
</tbody>
</table>

The Planning Phase of the “The Campaign for the University of Rhode Island” occurred July 1, 2016 through December 31, 2017. The Leadership Phase began on January 1, 2018. The Campaign has an anticipated end date of June 30, 2024.

***CONFIDENTIAL***
2019 Day of Giving
• Total Dollar Amount Raised: $879,111
• 3,156 Unique Gift Count
• 2,963 unique donor count
• Athletic based challenges
  • Athletics goal: 425 gifts
  • Athletics Secured: more than 1,500 gifts

2020 Day of Giving
• Challenge Driven
  • Annual Fund
    • “The Rhody Challenge”
      “Double Your Impact Today! James Masterson ’49, will make a $100,000 gift to student scholarships in recognition of the first 1,000 donors to the URI Annual Fund.”
  • College based challenges
  • Athletics
  • Leaderboards
    • Colleges
    • Annual Fund
    • Men’s Varsity Sports
    • Women’s Varsity Sports
    • Club Sports
Big Ideas. Bold Plans.
The Campaign for the University of Rhode Island