



**Advancement Committee Meeting
March 10, 2022**

Agenda

1. Campaign update
 - Davis Family
2. Campaign Anatomy
3. Committee Recruiting Update

Campaign Updates

Shelby Cullom Davis Charitable Fund

Report requested by Andrew Davis on behalf of the Shelby Cullom Davis Charitable Fund delivered in January 2022.

Outline of the aspirational goals of the transformational opportunity to make UWC-USA a Basecamp for the World. Per the request of Andrew Davis on behalf of the Fund, the report included:

- Overview of the Davis Support for UWC: the last 10 years (report included difference between Forever Fund and UWC-USA)
- Philanthropy at UWC-USA and demographics of students who benefit
- Board giving over the last 10 years
- Transformation: UWC-USA as a Basecamp for the World

Campaign Updates

In mid-February, Andrew informed us that we would not be considered for support in 2022—standard procedure. He emphasized Shelby’s focus on scholarships and SCDCF’s biggest investment UWC. He praised our progress to date.

Takeaways:

- Clarifying in terms of the campaign timeline, current scope and next steps in the campaign.
- Demonstrates the need for continued cultivation of the Davis family which is on-going on a number of different levels across two generations.
- Provides an opportunity to focus on alternative strategies.

Next Steps...

1. Focus on the kickoff 40th anniversary celebrations in fall 2022 to begin “socializing” key themes of the campaign and strategic messaging to envision the future of UWC-USA.
2. Formalize a “white paper” for use with lead donors for conversation regarding the campaign. With input (and commitments!) from lead donors, the white paper will become the basis for communication for the public phase to follow.
3. Continued focused travel to meet with quiet phase big donors, including alumni, to socialize the UWC-USA vision and strategy.
4. Continued development of the campaign committee.
5. Repurposing of all current advancement communications efforts to celebrate the 40th anniversary (e.g., Distinguished alumni series, Kaleidoscope, monthly communications, etc.).

Campaign Anatomy

- **Major Gifts/Bequests - \$20 - 25 million**
 - Solicited from top 30-50 prospects
- **Mid-level donors - \$3 - 5 million**
 - Five to six-figure gifts from alumni, parents and friends of the school
- **Women's Leadership Initiative - \$5 million**
 - Fifty prospects each committing \$100,000 (or \$20,000/year over five years)
- **New Mexico Leadership Initiative - \$5 million**
 - Fifty prospects each committing \$100,000 (or \$20,000/year over five years)
- **Annual Fund - \$11 - 12.5 million**
 - Increase to \$2.5 million annually over next five years
 - Based on modeling done as part of strategic planning process

UWC-USA Comprehensive Campaign

Donor Pyramid

Gift Range	# Gifts req.	# Prospects req.	Subtotal	Cumulative total	Cumulative %
\$ 10,000,000	1	5	\$ 10,000,000	\$ 10,000,000	25%
\$ 3,000,000	1	5	\$ 3,000,000	\$ 13,000,000	33%
\$ 2,000,000	2	10	\$ 4,000,000	\$ 17,000,000	43%
\$ 1,000,000	8	24	\$ 8,000,000	\$ 25,000,000	63%
\$ 500,000	10	40	\$ 5,000,000	\$ 30,000,000	75%
\$ 100,000	100	250	\$ 10,000,000	\$ 40,000,000	100%
Total:	122	334	\$ 40,000,000	\$ 40,000,000	

UWC-USA Comprehensive Campaign

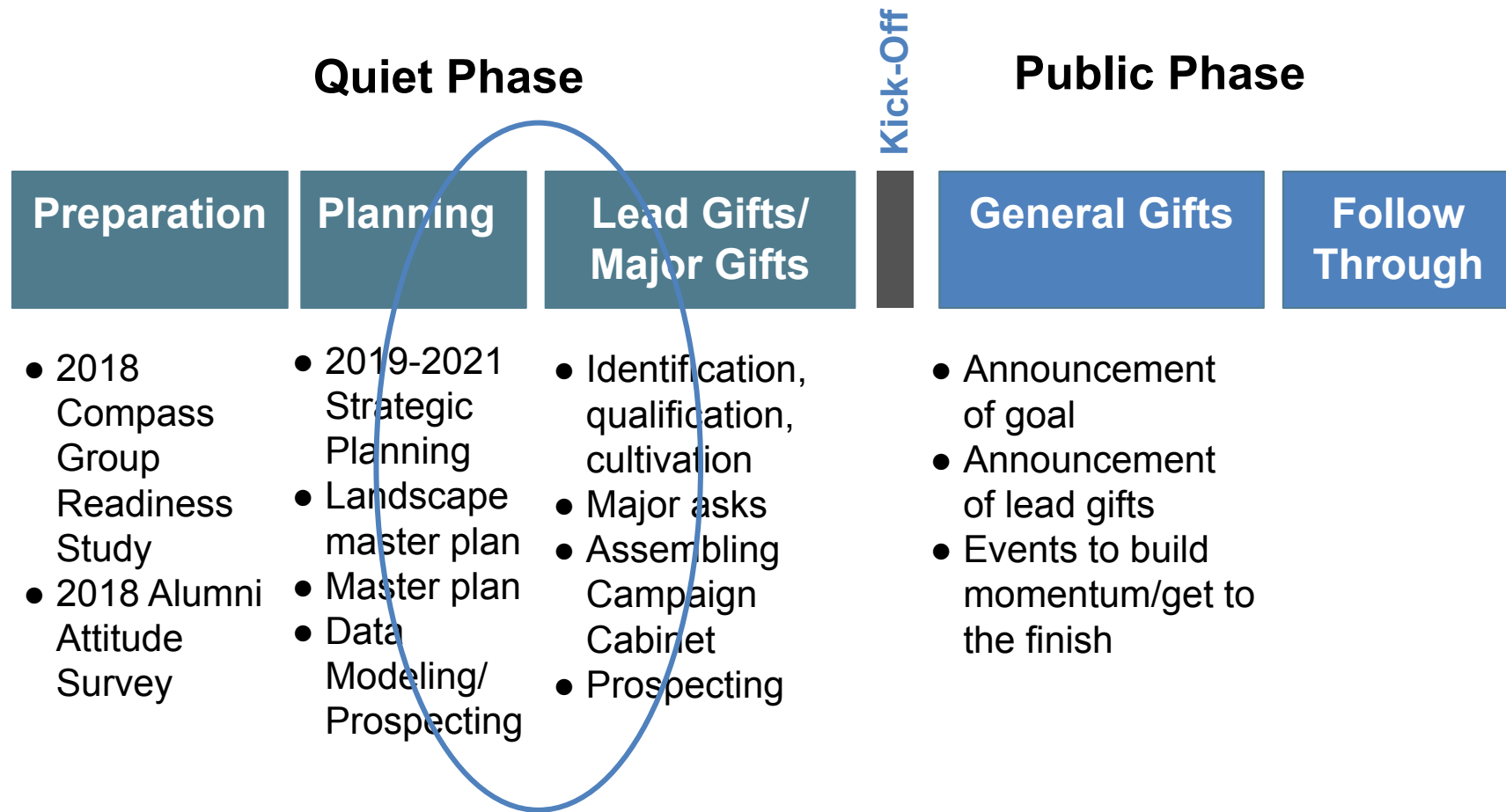
Donor Pyramid

Gift Range	Gifts req.	Prospects	January 2022 Status	Cumulative total
\$ 10,000,000	1	5	3 identified, 1 qualified/being solicited, 2 in process	\$ 10,000,000
\$ 3,000,000	1	5	2 identified/qualified, 2 in process	\$ 13,000,000
\$ 2,000,000	2	10	4 identified/qualified; 2 in process	\$ 17,000,000
\$ 1,000,000	8	24	18 identified/qualified; 6 in process	\$ 25,000,000
\$ 500,000	10	40	Identification/Qualification in process	\$ 30,000,000
\$ 100,000	100	250	Identification/Qualification in process	\$ 40,000,000
Total:	122	334		\$ 40,000,000

Translating the Strategic Plan into a Case for Support

Goal	Key Areas	Opportunity	Institutional Impact
People	Students	Scholarships	Budget Relief, Access, Diversity
	Faculty	Endowed Chairs, professional dev.	Budget Relief, Access, Diversity
	Partners	Fellowships, Internships collaborations	Capacity & Reputation Building
Programs	Inequality, polarization and sustainability new frames for signature programs	Named and endowed programs	Budget relief and new opportunities
Place	Model campus for sustainability and purpose	Carbon neutral campus; sustainable construction, responsible resource and energy use	Purpose-built spaces, CapEx relief, budget relief

Phases of Campaign



Time Frame: Planning Assumptions/Projection



Campaign Committee Update

- Sebastien de Halleux meeting with prospective co-chair this week with deep network of contacts and potential for future board involvement.
- Strategy session with Sebastien planned for next week
 - Status Update on co-chair search and other prospective committee and donors next week.
 - Campaign overview/planning
 - Master Plan
 - Davis strategy
- Reception with new, high-profile prospective donors in San Francisco interested in sustainability transformation of our school

Comprehensive Campaign Structure

Board Role

- **Making a stretch gift** to show their support and kickstart the giving process: campaign goal for board giving
- **Multiplying** forces through introductions and new donor gifts
- **Meeting with major donors** to strengthen relationships and secure their support, especially where there is an existing relationship
 - Davis strategy
- **Monitoring Progress** throughout the entire process and balancing short-term and long-term goals (e.g. development of the annual fund as a sustaining base of support). Largely a function of the Advancement Committee.
- Meeting with advancement committee prospects

Comprehensive Campaign Structure

Next Steps:

- **Proposed Board development workshop:** Two consultants/firms have been solicited for proposals - anticipated by end of next week (Board role in campaign)
- Advancement Committee discussion and decision points
 - Consultant to do workshop
 - Goal setting for board leadership giving to campaign
 - Who will solicit the board?

Status Update:

Prospective Advancement Committee Members

Eivind Djupedal - Current Finance Committee member. Board experience, and focus on strategic alliances and corporate responsibility

Ashindi Maxton '93 - Co-Director of the Donors of Color Network, a new community of high net worth donors dedicated to systemic change that created racial equity. Prior to this role, Ashindi served as an independent strategist and donor advisor in democracy reform, and social and racial justice. She is a Board Member of the Texas Organizing Project, Voqal USA, and Way to Win.

Roshin Mathew '00 Director of Communications, Women Donors Network. Had initial conversation and willing to be engaged with a project on the Leadership Initiative. Follow-up conversation planned for early February regarding initiative and potential interest in committee.

Lisa Krassner '91 Over 20 years experience in management of major museums.

Meeting Schedule



November 18, 2021

January 13, 2022

March 10, 2022

May 12, 2022

July 21, 2022

September 15, 2022

All dates scheduled for Thursdays at 11 AM Montezuma/1 PM Eastern/6 PM London