

**MEMORANDUM**

**To:** Michael Hardman, Chief Global Officer, Committee Chair

Bob Adler, Dean, College of Law

Rich Brown, Dean, College of Engineering

Rena D’Souza, Dean, School of Dentistry

Fred Esplin, Vice President, Institutional Advancement

Sarah George, Director, Natural History Museum of Utah

Robert Newman, Dean, College of Humanities

Randy Olson, CEO, Moran Eye Center

Taylor Randall, Dean, David Eccles School of Business

Barb Snyder, Vice President, Student Affairs

Jay Vogelsang, Associate Vice President for Development, Health Sciences

Doug Stewart, Marts & Lundy, external advisor

Cathy Anderson, Associate Vice President, internal advisor

**FROM:** Ruth V. Watkins, Senior Vice President for Academic Affairs

Vivian S. Lee, Senior Vice President for Health Sciences

**DATE:** October 12, 2013

**SUBJECT: Fundraising Working Group**

We are writing to invite you to serve on a working group to explore the best means to advance our fundraising efforts. As we are all keenly aware, our success in securing private support for students, faculty, programs, and facilities will be instrumental in our ability to excel in the years ahead. Thoughtful consideration is needed on how to make wise and effective investments in fundraising; opportunities for innovation in research and education will be shaped by both the quality and quantity of our efforts to garner support for such creative endeavors.

With this background, we ask for your assistance with the following specific questions:

* What is the level and nature of the investment that peer institutions are making in fundraising staff and operations (e.g., Pac-12 and Big 10 peer institutions)?
* How do our peer institutions support the cost of fundraising staff and operations? Information will be shared at the initial meeting that may be useful as background.
* What is the level and nature of our current investment in fundraising staff and operations, and how do we support these costs?
* What return on investment should we reasonably expect from front-line fundraising staff? It may be most informative to gather general benchmark data for a variety of fundraising functions (e.g., major gifts, corporate and foundation giving, planned giving, etc.).
* To be effective at fundraising, deans, directors, and development staff require back-office support (i.e., research, stewardship, data systems). Is it possible to compare our level of investment in these support functions with the investments of peer institutions?
* Based on the information gathered and reviewed, what recommendations might you have for fundraising operations at the University of Utah? Specifically, if you find that greater investments in fundraising would yield significant ROI to support innovation in people, programs and facilities, what options would there be for identifying/securing resources for fundraising staff and operations? Is our current investment sustainable?

We have asked Michael Hardman to serve as the chair of your working group, and he has graciously agreed to do so. Doug Stewart, a consultant from Marts & Lundy (the firm that has advised the University through several campaigns), will be available to assist your working group as you seek comparative data and examples of best practices. Cathy Anderson is also available to provide context on how central fundraising efforts are currently funded. We hope that you will be able to provide a report on your findings and recommendations in the early part of the new calendar year.

Thank you in advance for your service on this critical working group. Your insights and advice are essential as we seek the resource base that will allow the University of Utah to continue to thrive, excel, and advance in the years ahead.

RW:jj