

Campaign Working Group



EXECUTIVE SUMMARY

Idaho is one of the top two fastest-growing states in the nation. That growth brings with it opportunities to improve the lives of Idahoans, particularly through increased economic activity and job growth. A growing population also brings its fair share of challenges in resource sustainability, agricultural output, information integrity, infrastructure and healthcare, among others.

Perhaps now more than ever, Idaho needs the meaningful insights, transformational solutions and well-educated workforce produced by its foremost research land-grant university.

The University of Idaho's mission is to prepare students for careers and life; conduct research that benefits discovery, business and industry in Idaho and beyond; and engage in outreach that strengthens communities – rural and urban – and spurs economic prosperity. With strong leadership and key strategic projects already underway, U of I has established a firm foundation for future success. Now is the time to focus and amplify this forward momentum for the benefit of the state, nation and world.

Charge from President Green

President Scott Green formed the Campaign Working Group to develop and recommend a strategic approach for embarking on a successful comprehensive fundraising campaign. The components of the working group's output include 1) the case for why a comprehensive campaign is strategically important now and how it will help shape and implement the long-term vision of the institution, 2) a description of the academic and communications processes required to develop and articulate that long-term vision and

3) support for the additional staffing and operations resources needed to plan and execute a successful campaign.

In addition, this whitepaper includes a recommendation for a phased approach to the public launch of the campaign, which reflects the unique opportunities available at this point in Idaho's and U of I's history.

A formal campaign plan – designed primarily for internal audiences – will be developed upon approval of the white paper and will include more detail about budget, staffing, timeline, etc. A formal campaign case statement – designed primarily for external audiences – will be developed in time for the public phase of the campaign.

Working Group Members and More

Comprised of dedicated alumni leaders (see Appendix A), donors and university leaders, the Campaign Working Group met several times to discuss the recommendations in this white paper, which is intended to serve as a road map for completion of a successful campaign that fuels a bold new vision for the University of Idaho.

In March 2021, the Campaign Working Group broke into subcommittees to tackle each component of the whitepaper listed above.

In parallel to the business of the Campaign Working Group, U of I embarked on a series of virtual Industry Summits with executive-level leaders from industries throughout Idaho. These leaders discussed their challenges, successes and aspirations for Idaho's future, and how they might partner with the university to address them. Key components are incorporated in the white paper.

SECTION 1: THE CASE FOR A COMPREHENSIVE FUNDRAISING CAMPAIGN

What does a comprehensive fundraising campaign mean for the University of Idaho? A campaign is not simply a means for raising money; it is a tool for identifying and accomplishing bold, strategic goals that, as a result, serve all of U of I's constituencies even better. A successful campaign engages a broader group of alumni and partners and inspires their support in all forms for decades yet to come.

The members of this subcommittee affirm that a successful campaign will result in rejuvenated audiences, deeper connections to and pride in U of I; renewed confidence in our mission; and expanded partnerships and greater brand awareness. In short, a campaign builds capacity for the institution to achieve its long-term goals, always focused on best serving the state that it calls home.

With unprecedented population growth, rapid economic growth and the many issues that accompany them, Idaho needs what its foremost research land-grant university can provide to meet today's needs and solve tomorrow's most complex problems.

For example, the lack of educated, workforce-ready employees – especially in the fields of cybersecurity, healthcare, software development, agriculture and engineering – stands to threaten Idaho's robust economy. Across Idaho's predominant industry sectors, there aren't enough people locally to meet the demand for various skilled positions. In the Industry Summits conducted by U of I, leaders said they struggle to find and afford the workforce they need to conduct business. Some are even considering moving out of Idaho to places with a larger qualified workforce.

The lack of an educated workforce isn't surprising, considering Idaho's "go-on" rate (the rate at which high school graduates go on to

pursue additional education and/or training) is the lowest in the country and still declining. From 2016 to 2019, the go-on rate declined from 49% to 45%¹. 2020 rates were even lower due to factors related to the pandemic.

Cost of higher education in the state is a primary factor. Families in Idaho continue to struggle to afford a college education for themselves and/or their children, due at least in part to the shift in support for higher education from the state to the student. In 1980, the state covered nearly 90% of an Idaho family's cost of higher education. Today, the state covers only 50%², leaving families to pick up the rest. Adjusted for inflation, U of I tuition and fees increased from \$1,441 to \$8,304 during that time. Overall, today only one-third of U of I's total budget comes from the state.

Making higher education accessible for all qualified Idaho students is a priority shared by the state and the University of Idaho for the many lifelong benefits of a college education. Statistics show college graduates are more likely to be involved in their communities, tend to live nine years longer and earn \$1.2 million more on average over their lifetimes than those with only a high school diploma³.

Clearly, Idaho benefits from having more college graduates in general, but our state also needs more college graduates with *durable and specialized skills* to advance the health of our industries and our communities.

Healthcare is just one area where the need for a specialized workforce is dire. Idaho ranks among the lowest in the U.S. in physicians per capita with an aging workforce of healthcare professionals. Just as cost is a barrier for those seeking a bachelor's degree, Idaho's aspiring doctors struggle to afford a medical education. Considering many medical school graduates have six-figure loan debts and the average pay for Idaho physicians is \$60,000 less than other states, many Idaho-trained physicians leave Idaho to practice in neighboring states that pay higher wages.

Current and incoming students at all levels need more financial aid support than ever – a reality that can be mitigated by a successful comprehensive fundraising campaign.

Advantages of a Public Launch Now

No matter the conditions, U of I continues to demonstrate unwavering support for its students. A fall 2021 campaign launch focused on U of I's commitment to student success will build on its current momentum. Further, in the silent phase of the campaign (2015 to present), the university has raised over \$259 million toward the overall goal of \$500 million. This momentum demonstrates to potential donors that U of I, its students and its service to Idaho are a worthwhile investment.

As businesses and communities are opening back up, post-pandemic and economic activity is increasing and Idahoans are feeling a sense of renewal and hope. U of I is in an ideal position to pursue emerging opportunities and engage with its stakeholders in new ways. Consider:

- Alumni and industry confidence in President Scott Green
- Progress on strategic projects such as CAFE, Vandal Promise Scholarship initiative and expansion of the Parma Research and Extension Center
- Record-setting fundraising over the past four years
- Excitement for the Idaho Central Credit Union Arena grand opening in October 2021
- New one-on-one partnerships between U of I and industry stakeholders developing as a result of the Industry Summits with the potential for larger-scale partnerships on the horizon
- New university leaders' enthusiasm and expertise
- U of I's increasing financial health
- A return to in-person events and "normalcy" post-pandemic

At a time when other universities have delayed publicly launching their campaigns, the University of Idaho is ready to boldly announce what our impact will be on Idaho and the world. A comprehensive fundraising campaign of the magnitude proposed here – with an initial focus on student support – will give U of I significant resources to attract, retain and graduate more students who can meet industry demand for educated workers and make a difference in their communities.

Through discussions of current events, conditions and attitudes, the subcommittee feels strongly that launching the public phase of the campaign in fall 2021 offers opportunities and advantages that might not be available in a year or more. In addition, the campaign propels the university into processes that define, refine and articulate its long-term vision and set its strategic priorities.

The Campaign Working Group supports and recommends launching the public phase of a comprehensive campaign in fall 2021.

See "Section 4: Phased Public Launch" for additional details.

SECTION 2: ARTICULATING A BRAVE AND BOLD VISION FOR THE FUTURE

What can we do through this campaign that, at its conclusion, will define what it means to be a land-grant university in the 21st century? How can we best meet the education and research needs of our growing and prosperous state? What will generate new and increased interest in U of I across broad audiences? How will we inspire greater engagement with and support of U of I through messaging and telling the stories of its impact?

These are the questions the subcommittee responsible for this section considered in making recommendations for developing and articulating a new, brave and bold vision for U of I. Established by the academic side of the house and articulated with clear, compelling communications and marketing, the vision will become the North Star for the campaign and for U of I well into the future.

Developing a Vision for the 21st Century

The university's academic community is engaging in conversations about the possibilities and opportunities a campaign will afford individual faculty members, colleges and other units to combine forces to better serve the state. Discussion topics include:

- How does U of I leverage its traditional institutional strengths in new ways to address Idaho's emerging issues and needs, such as water, energy, environmental resilience, health science and cybersecurity?
- How does U of I continue to deliver and enhance a transformational experience for students that produces the highly skilled, critical thinking, problem-solving workforce the state needs to prosper?

- How does U of I take maximum advantage of its statewide campus featuring some of the most unique outdoor "classrooms" in the world?

These ongoing conversations will help inform programmatic decisions as part of a rigorous process for defining those few strategic priorities that represent the intersection of the institution's strengths, its potential and opportunities present in the larger world. Clear, focused priority setting is imperative to ensure the goals of the campaign are strategic, ambitious and achievable.

The Campaign Working Group supports and recommends:

- *Continuing focused conversations with academic leaders to surface programmatic strengths and opportunities.*
- *Completing a rigorous vetting process to establish strategic priorities for the campaign and beyond.*

Articulating the Vision, Telling our Story

The Campaign Vision subcommittee emphasized that campaign communications are a critical piece of campaign success and, in fact, U of I's future success. They agreed that despite this University of Idaho's distinguished history and proven areas of impact, too few stakeholders are aware of its profound influence on the state and region. With strong academic direction and vision, unified communications and a clear brand platform as a base, the campaign provides an excellent opportunity to increase the visibility of U of I's message and inspire its communities to partner in striving toward an aspirational vision of the future on behalf of those the university serves.

President Green has made “telling our story” one of his top three priorities since assuming his position. He hired a chief marketing officer who already has taken steps to strengthen U of I’s communications and marketing capabilities and to maximize the impact of all communications and marketing. Given the timeline for public launch of the campaign, the new CMO and team will develop a robust campaign marketing and communications plan that advances strategic priorities toward an aspirational vision of the future.

The Campaign Working Group supports and recommends:

- *Engaging a visionary partner to help articulate an aspirational vision and pillars as part of the university’s brand framework.*
- *Developing message frameworks based on established college-level priorities.*
- *Defining a clear, organized process for announcing major gifts and leveraging fundraising successes to advance the university’s brand.*

SECTION 3: CAMPAIGN OPERATIONS: INVESTING FOR SUCCESS

The University of Idaho’s comprehensive campaign is the most ambitious in the institution’s history and, as recommended by this Working Group, will launch publicly October 2021. The university has a working goal to raise \$500 million for the students, faculty, programs, facilities and research that serve as the University of Idaho’s foundation for excellence. This subcommittee evaluated the university’s prospective donor base and reviewed industry best practices to make prioritized recommendations for staffing and other resources needed to conduct a successful campaign.

The Opportunity by the Numbers

The University of Idaho has approximately 111,000 living alumni. The university’s statewide role with service to all 44 counties, plus the number of engaged individuals, corporations and private foundations, expands the database to include nearly 500,000 records – each with some connection to U of I. To establish a strong, lasting culture of philanthropy, the campaign will focus on:

- Expanding systemic qualification, discovery, cultivation and solicitation efforts to build a robust pipeline for major, planned and principal gifts.
- Improving and expanding data analytics to personalize the donor experience and focus integrated marketing, communications and engagement resources for fundraising success.
- Growing an actively involved Vandal community through strategic engagement activities with faculty, staff, alumni, friends and corporate partners.
- Creating an excellent donor experience by enhancing timely stewardship and recognition and demonstrating the impact of philanthropic investments.

Growing the Donor Base and Gift Pipeline

The success of any multi-million-dollar campaign depends on qualifying, cultivating and securing major gifts (defined as \$25,000 or more) from a pool of donors that grows smaller as the size of potential gifts increase. (See Appendix B.)

At present, 2,700 prospects are assigned to our 22 FTE frontline fundraisers. (That’s 123 assigned prospects per fundraiser portfolio.) However, the University of Idaho has 33,000 prospective donors rated to have the means to give a major gift, but who are currently not assigned to a development officer for engagement and cultivation.

Of those 33,000, more than 8,500 have a medium to high affinity for U of I with strong records of giving and engagement. A priority for the campaign will be strengthening relationships with these medium- and high-affinity individuals and organizations.

University Advancement has begun implementing cost-neutral strategies to optimize its workforce to focus on those relationships. These strategies are creating a solid foundation on which to grow fundraising capacity before and throughout the campaign.

To qualify, cultivate and solicit those additional 8,500 potential donors – while also advancing the 2,700 assigned prospective donors towards major planned and principal gifts – the university needs to invest additional resources in its fundraising program. (See Appendix C.)

By implementing a prioritized series of investments over time, U of I will significantly expand its capacity to reach many more prospective donors and secure many more resources for the university. These recommended investments will be described in the formal campaign plan.

These investments will produce a bold return on investment for U of I in terms of increased fundraising activity during the campaign and well after, providing the resources to meet university priorities and building an enduring culture of philanthropy throughout the Vandal Family.

The Campaign Working Group supports and recommends phasing in additional investments in fundraising and support functions before the public launch and during the campaign.

SECTION 4: PHASED PUBLIC LAUNCH

The traditional approach in higher education comprehensive campaigns is to launch the entire campaign at once, regardless of an institution's unique challenges and opportunities. This “big bang” approach creates excitement initially, but typically results in a lull in activity and giving the following year.

Further, many institutions wait until the tail end of their campaigns to roll out student-success-focused messaging and fundraising priorities.

At the University of Idaho, students come first, always. With this perspective and relevant strategies from the private sector, leaders in Advancement and University Communications & Marketing have explored a strategic, smart and customized approach to launching U of I's most ambitious, transformation campaign to date.

A Purposeful, Phased Launch

The University of Idaho is in a unique position to strengthen our commitment to students and the unparalleled experiences available to them.

A phased public rollout of the campaign (see Appendix D), beginning with a focus on students, will be a strategic advantage by ensuring opportunities for the next generation – something our donors and alumni tell us they are passionate about. A phased rollout will also enable the university to maintain momentum after the initial launch and take advantage of evolving reopening plans and increased travel activity, among other benefits.

The “Brave. Bold.” Campaign Phase 1

In October 2021, a student-focused campaign will launch, inviting alumni and donors to invest in scholarships, fellowships, experiential learning and more to benefit students in Idaho today and for generations to come.

This phase is designed to expand access to all of Idaho’s capable students who seek a college education. Expanded scholarships will attract and retain qualified students for whom a college education would otherwise be unaffordable.

It will also provide the resources to further enrich the student experience in areas such as undergraduate research and study abroad opportunities, which set the University of Idaho apart from its competitors and make our graduates highly sought-after in the workforce.

Throughout 2021-22, the university will continue to build up its industry relationships, galvanize campaign volunteers, define and refine a long-term shared vision and build anticipation for the next phase.

The “Unstoppable” Campaign Phase

In October 2022, the university will launch its vision – steeped in its land-grant roots and expanded to include emerging areas such as sustainability, information integrity, health and more. The vision statement will be crystal clear, helping to surface stories and opportunities to rally a variety of stakeholders around the difference U of I will make in Idaho and in the world as a result of the campaign.

Priorities for this phase will be established through focused conversations with academic leaders and a rigorous vetting process to ensure priorities are strategic, ambitious and achievable.

Both the “Brave and Bold” phase and the “Unstoppable” phase will run concurrently until the campaign goal of \$500 million is reached, or possibly beyond.

The Campaign Working Group supports and recommends launching the campaign in two phases beginning with a focus on students, followed by a focus on academic priorities.

CONCLUSION

The University of Idaho is charged with a mission that is critical to the health and prosperity of the state: Enable students to confidently explore their dreams and reshape what's possible, unlock the discoveries needed to make a difference for our state and world, and partner with statewide communities to improve the health, well-being and economic prosperity of all Idahoans.

By publicly launching a comprehensive fundraising campaign this fall, the University of Idaho will acquire the resources, partnerships and prominence necessary to achieve its long-term vision. In the process, U of I will create a lasting culture of philanthropy that generates ongoing financial resources for the university.

At the successful conclusion of the campaign, U of I will have redefined what it means to be a land-grant university in the 21st century, advancing our work in service to the citizens and industries of Idaho.

Summary of Campaign Working Group Recommendations

1. Launch the public phase of a comprehensive campaign in fall 2021.
2. Continue focused conversations with academic leaders to surface programmatic strengths and opportunities.
3. Complete a rigorous vetting process of academic and research priorities to help focus the campaign, guide the case for support and establish strategic priorities for the campaign and beyond.
4. Engage a visionary partner to help articulate an aspiration vision and pillars as part of the university's brand framework.
5. Develop message frameworks based on established college-level priorities.
6. Define a clear, organized process for announcing major gifts and leverage fundraising successes to advance the university's brand.
7. Make additional investments in prioritized fundraising and support functions before the public launch and during the campaign.
8. Launch the campaign in two phases beginning with a focus on students, followed by a focus on academic priorities.

APPENDIX A

Campaign Working Group Members

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Office of the President

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University Representatives

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External Representatives

Linda Davidson '73
U of I Foundation Board Director

Robert Furgason '56, '58, '06
(HON)
Former Academic Vice President

Clint Marshall '97
Secretary, U of I Foundation Board

David Poe '70
Former U of I Foundation Board Director, Founding Member CLASS Advisory Board

Linda Copple Trout '73, '77
Vice Chair, U of I Foundation Board



Analysis Summary

- To the immediate left outside the pyramid is the number of current prospective donor by capacity. The bracketed number are currently under management. The middle pyramid is the donors needed at each individual gift level to successfully complete a \$500 million campaign. On the outside right of the pyramid is the number of donors by giving band that have already contributed to the campaign.
- The opportunity is on the left outside of this pyramid. We currently have approximately 1,850 prospective donors under management with a current development officer. From a data perspective, that means there are 6,127 donors rated over \$100,000 we know very little about. If you expand that down to those rated at our current major gift level of \$25,000, that number jumps 33,775.

APPENDIX C

University of Idaho Prospect Pyramid

Capacity	A&A	ATH	CALS	CBE	CLASS	CNR	EHHS	ENGR	LAW	Other	SCI	WWAMI	Grand Total
\$25,000,000 - \$50,000,000			2										2
\$10,000,000 - \$24,999,999					1					1	1		3
\$5,000,000 - \$9,999,999										1			1
\$2,500,000 - \$4,999,999			1		1	1	2			7			12
\$1,000,000 - \$2,499,999	3	27	18	20	19	7	5	8	6	72	15	8	208
\$500,000 - \$999,999	4	54	33	38	37	14	20	37	16	95	22	8	378
\$250,000 - \$499,999	17	158	100	85	123	38	56	158	47	295	73	24	1174
\$100,000 - \$249,999	111	564	407	340	428	173	262	540	162	872	229	85	4173
\$50,000 - \$99,999	289	1221	772	619	1062	466	954	1144	353	2065	456	125	9526
\$25,000 - \$49,999	499	2120	1472	1019	2111	994	2110	1833	574	4328	721	127	17908
Grand Total	923	4144	2805	2121	3782	1693	3409	3720	1158	7736	1517	377	33385

Capacity by College

Campaign Goal	\$12,191,825*	\$65,385,007*	\$90,649,419*	\$26,459,283*	\$41,669,017*	\$19,807,815*	\$23,257,665*	\$49,464,161*	\$13,408,745*	\$116,345,722*	\$26,417,181*	\$15,919,155*	\$507,512,500
Annual Goal	\$1,219,183	\$6,538,501	\$9,064,942	\$2,645,928	\$4,166,902	\$1,980,782	\$2,325,767	\$4,946,416	\$1,340,875	\$11,634,572	\$2,641,718	\$1,591,916	\$50,751,250
Development Officers	1	3	5	1	2	1	1	2	1	5	1	1	24

*College goals calculated via prospect base capacity in combination with historical fundraising total trends

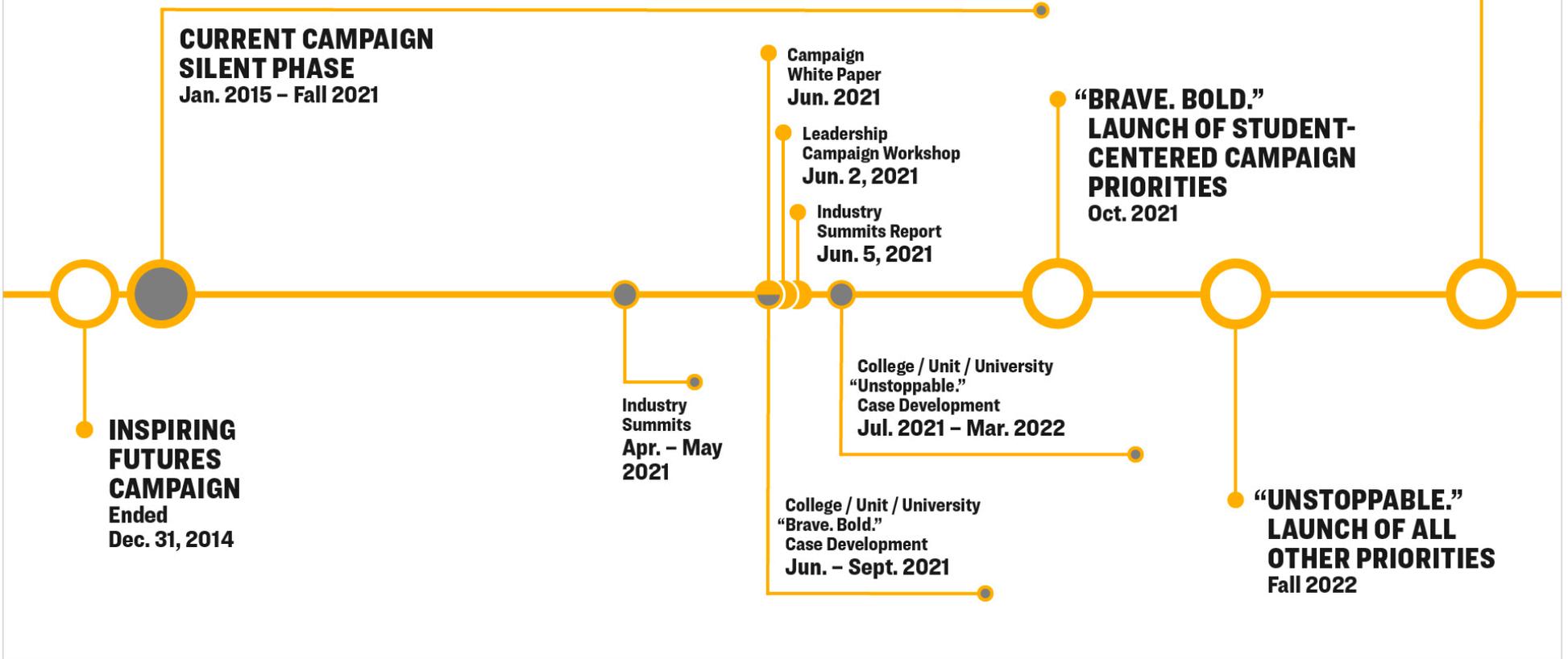
Analysis Summary:

- Advancement has 18 major gift officers currently. This data-driven analysis highlights the need for 24 major gift officers during a \$500 million campaign.
- Campaign-to-date: 7,382 unique prospects have been contacted by development officers out of a 33,385 total major gift prospect base.
- U of I major gifts officers raise on average \$1.2 million each year. Six additional major gift officers would fundraise an additional \$7.2 million annually.

CAMPAIGN TIMELINE

GOAL!
\$500M
PARTY!

TBD ~2025



References

¹ “Instead of going on, Idaho high school graduates stayed home” Idaho Ed News, Jan. 5, 2021.
www.idahoednews.org/higher-education/instead-of-going-on-idaho-high-school-graduates-stayed-home/

“Percentage of High School Graduates Enrolled in Postsecondary Education at Each Point After High School Graduation,” 2016-2020
[Idaho State Board of Education Fact Book – 2020](#)

² “Idaho Center for Fiscal Policy Brief: The Cost of College in Idaho,” Aug. 2019
[Idaho Center for Fiscal Policy](#)

³ “Education Pays 2019: The Benefits of Higher Education for Individuals and Society,” 2019
[College Board “Trends in Higher Education Series”](#)



University *of* Idaho