To: Facilities, Finance & Technology Committee
   University of Maine System Board of Trustees

From: Allyson Handley
    President, University of Maine at Augusta

Date: March 4, 2014

RE: UMA 50th Anniversary Campaign

2015 marks the 50th anniversary of the founding of the University of Maine at Augusta. A 50th anniversary only comes once and affords a unique opportunity for substantial fundraising within the campus community and more importantly outside of it.

Further, with cutbacks now taking place across the University System, this could not be a more opportune time to take advantage of this important anniversary milestone to generate major new revenue to fund high priorities for UMA.

For the past six months, UMA has been developing its 50th Anniversary plan. To date, we have:

- Put together a draft campaign case that outlines the rationale and scope for the campaign. The case’s focus aligns well with both UMA and System priorities, most especially enhancing learning opportunities for the adult and distant learner. The case is compelling and differentiates UMA’s campaign from other higher education campaigns.

- Set a fundraising goal of between $5 million and $7.5 million, with a breakdown for where the money would go and how it would be used.

- Established a two to three year timeline, which includes an advance phase that concludes this spring, a leadership phase and major gifts phase that would run through this calendar year, followed by a public campaign that would begin in calendar year 2015.

- Created a governance and operating structure for the campaign that includes a Campaign Board, an Advisory Council, and six operational committees. It also includes important representation and input from our Board of Visitors.

- Identified campaign leadership. Several chairs have already been successfully recruited and recruitment efforts are ongoing.
• Developed a tentative budget for the campaign.

• Shared the draft case with UMA leadership, alumni representatives, and key community and business leaders, including UMA's Board of Visitors and members of the UMA Foundation.

• Held one-on-one meetings with key prospective financial donors and campaign leaders, with more planned for later this month.

• Conducted research and identified grant opportunities that align with the campaign goals of the 50th Anniversary Fund.

• Sent out an RFP for consulting services and now reviewing proposals. Pending Board of Trustee approval, a consultant would begin in April. The consultant's first step would be to augment our internal feasibility efforts with an enhanced study. Through these efforts, UMA would set its final fundraising goal, finalize its case and other materials, and launch its campaign later this spring.

Based on our work so far, the steady growth of UMA's development apparatus that included the successful $3 million renovation of our dental hygiene clinic, my own successful fundraising experience with similar campaigns at other institutions, and the favorable and encouraging response we have received from key leaders and prospective donors in our community, I believe our 50th Anniversary Campaign is poised for success. I respectfully ask for Board of Trustee approval, so we can move full speed ahead.

Enclosed, please find the draft case, the campaign structure, and budget for your review.

Thank you for your consideration.

Sincerely:

[Signature]

Allyson Handley
President
University of Maine at Augusta
UMA Capital Campaign Budget

April, 2014 – December, 2015

Personnel

Consulting Services.................................................. $150,000 - $230,000
(for 9 months to one year, includes full time staffing)

Grant writer............................................................... $5,000 - $10,000

Temp. Staff................................................................. $20,000 - 30,000
(half time for year two)

Printing and Design

Case for Giving......................................................... $2,500

Pledge Materials......................................................... $1,000

Leadership Giving Booklets...................................... $2,500

Planned Giving Materials........................................... $1,000

Campaign/Alumni Newsletter.................................... $6,000

Miscellaneous............................................................ $1,500

Campaign Video.......................................................... $10,000

Postage

Alumni Mailings........................................................ $15,000

Other Mailings.......................................................... $5,000

Giveaways

50th Anniversary Calendar/Report......................... $5,000

Other Giveaways........................................................ $5,000
Celebrations/Exhibits/Events.......................... $10,000

Advertising.................................................................. $10,000

TOTAL.........................................................................$249,500 - $344,500

(this represents between 5% and 7% of expected goal)