ENDOWMENT
The minimum to endow a named, unrestricted fund is $25,000 and for a named, restricted fund is $50,000. Currently there are 4,542 endowed funds supporting OSU. New endowments are assessed a fee of the interest earned, in a holding account during the six months before investment. It is known as the 180-day hold. Account singers are authorized to spend interest earned from the endowments once the corpus reaches $50,000. The OSU Endowment distributes 4.25% of the market value over seven years annually.

Endowment Values
  FY'00 market value at $1.295 billion
  FY'05 market value at $1.726 billion
  FY'07 market value at $2.338 billion
  FY'08 market value at $2.076 billion
  FY'09 market value at $1.652 billion
  FY'10 market value at $1.87 billion
  FY'11 market value at $2.1 billion
According to OSU’s FY’11 endowment report, $97.9 million was distributed to endowed funds with $17.9 million, or 18%, to scholarships, fellowships, and student loans. According to OSU’s 2011 Annual Report, although the total market value exceeds the gifted value, there are 2,316 named funds underwater.

ATHLETICS
Athletics has a significant impact on OSU’s fundraising efforts. Donors who give at the President’s Club level (currently $2,500 but will be raised to $3,000 in FY’13), become eligible to purchase football tickets. Donors may give to any allocation at the University but gifts made directly to The Buckeye Club (athletics) are not recognized as members of the President’s Club even if they are the appropriate amount.

The senior director of development for the College of Arts and Sciences shared that last year approximately 17,000 of their 180,000 living alumni gave (Arts and Sciences alumni only). However, 14,000 gave to either athletics, the Medical Center, or annual giving with 3,000 giving directly back to their college.

According to the FY’10 Annual Report, gifts supported purposes according to the following:
  47% research
  21% program support
  17% student financial support
  6% physical facilities, operation, and maintenance
  5% unrestricted and unit discretionary
  4% faculty and staff support

BOARD INVOLVEMENT
According to OSU development staff, each unit has an advisory board to serve the deans and directors. All boards set a goal of 100% giving participation, but that is still a work in progress. Additionally, each unit has a campaign steering committee, in some cases the advisory board fills
this role. Each chair of the campaign campaign steering committee sits on the university-wide campaign steering committee and is expected to make a transformational gift (seven figures or higher).
Old Dominion University

Fundraising Results

1. Total Endowment per year (2002-2012)
   
<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>$72,640,157.34</td>
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<tr>
<td>2003</td>
<td>$108,030,368.17</td>
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<td>2004</td>
<td>$122,530,061.83</td>
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<td>2005</td>
<td>$138,861,015.50</td>
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<td>2006</td>
<td>$156,654,884.29</td>
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<td>2007</td>
<td>$183,525,053.10</td>
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<td>$182,379,659.42</td>
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<td>2009</td>
<td>$136,641,644.83</td>
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<td>2010</td>
<td>$144,280,085.99</td>
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<tr>
<td>2011</td>
<td>$161,182,627.86</td>
</tr>
<tr>
<td>2012</td>
<td>$168,086,684.05</td>
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</table>

2. Total Gifts/Pledges per year (2002-2012)
   
<table>
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<tr>
<th>Year</th>
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<td>2012</td>
<td>$28,701,674.74</td>
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</table>

3. Alumni Giving percentage per year (2002-2012)
   
<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
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<td>2002</td>
<td>31.05%</td>
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<tr>
<td>2003</td>
<td>88.70%</td>
</tr>
<tr>
<td>2004</td>
<td>26.36%</td>
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<tr>
<td>2005</td>
<td>22.93%</td>
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<td>2006</td>
<td>41.16%</td>
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<td>2008</td>
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<td>2009</td>
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<tr>
<td>2010</td>
<td>27.89%</td>
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<tr>
<td>2011</td>
<td>32.16%</td>
</tr>
<tr>
<td>2012</td>
<td>53.37%</td>
</tr>
</tbody>
</table>

4. Structure
a. **Public foundation or private institution:** Public Foundation (2 Foundations)
b. **Size of staff (FTEs):** 18 (Foundation paid staffs - does not include 42 fundraisers/admin staff paid by the University)
c. **Budget**
   i. Salaries $959,093.00
   ii. Non-Salary-Operating $421,350.00

5. **How do donors give to your Annual Fund? (%)**
   a. Mail 68.69%
   b. Phone 22.32%
   c. Online 8.99%

6. **Where is the money coming from (percentage of gifts totaling $100%)?**
   a. Alumni 53.37%
   b. Friends 17.78%
   c. Parents 0.22%
   d. Community 1.33%
   e. Corporations 19.04%
   f. Foundations 8.26%

7. **Operating vs. endowment giving (estimated)**
   a. Percentage of gifts that are endowment 70.59%
   b. Percentage of gifts that are operating: 29.41%

8. **What percentage of your endowment supports student tuition?** 24%

9. **Cost to raise dollar?**
   Annual fundraising expense budget vs. overall dollars raised
   $0.18

10. **Campaign investment – Has it yielded additional gifts?** There have been additional resources committed to a potential campaign. It is too early in the process to have any gifts as a result.

11. **Percentage of dollars counted toward fundraising which are sponsored research or faculty driven.**
    Small percentage of overall funds raised are faculty driven. Most larger grants of this type come through the Research Foundation.

**Trends**

1. **What areas are people supporting? By %**
   Students
   Research
   Faculty
   Buildings
   Unrestricted
   Other
2. **Athletics fundraising trends**
   a. **Do you have a football team?** Yes
   b. **What impact does football have on fundraising?** Major driver of athletic fundraising. Substantially increased number of donors to the Athletic Foundation and dollars raised.
   c. **% of Athletic fundraising for football vs. other sports:** approximately 65%

3. **Do you have a gift fee?**
   a. **How much?** 5% on restricted annual gifts.
   b. **Is it campaign based and will you do away with it when your campaign ends?** No.

4. **What is your minimum dollar threshold for creating a named endowment?** $25,000

5. **Board giving**
   a. **% participation:** 100% for Educational Foundation Board in 2012
   b. **Total giving**
   c. **% of annual fundraising**
   d. **% of campaign fundraising**

6. **How do you use volunteers in fundraising?** Volunteers help identify new prospects, open doors to prospect, and help close gifts.

7. **Salary of graduates vs. impact on giving**
   a. **Given the slow economy as of late, have you heard that the giving rate for young graduates is down because many do not have employment after graduation?** No
   b. **What is the % giving rate of recent (last 10 years) graduates?**

8. **Planned giving percentage of overall giving?**

9. **Do your Deans/Administrators have fundraising requirements?** ODU has recently implemented goals for Deans related to prospect visits/contacts.

10. **Do you use social media in giving platform?** No.
    a. **How**
    b. **Is it successful**
    c. **When did you start**
Alumni giving represents 5% of the category weight, and is an average of the last two academic years.

<table>
<thead>
<tr>
<th>Question #</th>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>284</td>
<td>Number of undergraduate alumni of record during the last academic year? (2010-2011)</td>
<td>41,030</td>
</tr>
<tr>
<td>285</td>
<td>Number of undergraduate alumni of record during the previous academic year? (2009-2010)</td>
<td>39,257</td>
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<tr>
<td>286</td>
<td>Number of undergraduate alumni of record during the last academic year that were solicited? (2010-2011)</td>
<td>39,523</td>
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<tr>
<td>287</td>
<td>Number of undergraduate alumni of record during the previous academic year that were solicited? (2009-2010)</td>
<td>35,080</td>
</tr>
<tr>
<td>288</td>
<td>Number of undergraduate alumni donors during the last academic year? (2010-2011)</td>
<td>3,033</td>
</tr>
<tr>
<td>289</td>
<td>Number of undergraduate alumni donors during the previous academic year? (2009-2010)</td>
<td>3,131</td>
</tr>
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</table>

Alumni of record are former full- or part-time students who received an undergraduate degree and for whom the college or university has a current mailing address.

Average alumni giving rate is the average percentage of undergraduate alumni of record who donated money to the college or university.

Graduates who earned only a graduate degree are excluded. Undergraduate alumni donors are alumni with undergraduate degrees from an institution who made one or more gifts for either current operations or capital expenses during the specified academic year. The alumni giving rate is calculated by dividing the number of alumni donors during a given academic year by the number of alumni of record for that same year. These two separate alumni giving rates are then averaged for the past two academic years. The percentage of alumni giving serves as a proxy for how satisfied students are with the school. A higher average alumni giving rate percentage scores better in the ranking model than a lower average alumni giving rate.

Methodology:
1. Undergraduate alumni only - no alumni who earned only a graduate degree are included.
2. Date of graduation - less than or equal to June 30th of last year. USNWR reports on alumni giving for either current operations or capital expenses during the specified academic year.
3. Exclusions - inactive, deceased, no valid address, do not mail, do not contact, and do not solicit.
Alumni giving represents 5% of the category weight, and is an average of the last two academic years. These numbers were prepared, verified and sent to Institutional Research on 4/19/2011.

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<th>Response</th>
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<td>Number of undergraduate alumni donors during the last academic year? (2009-2010)</td>
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<td>Number of undergraduate alumni donors during the previous academic year? (2008-2009)</td>
<td>3,358</td>
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</table>

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**Average alumni giving rate** is the average percentage of undergraduate alumni of record who donated money to the college or university.

Graduates who earned only a graduate degree are excluded. Undergraduate alumni donors are alumni with undergraduate degrees from an institution who made one or more gifts for either current operations or capital expenses during the specified academic year. The alumni giving rate is calculated by dividing the number of alumni donors during a given academic year by the number of alumni of record for that same year. These two separate alumni giving rates are then averaged for the past two academic years. The percentage of alumni giving serves as a proxy for how satisfied students are with the school. A higher average alumni giving rate percentage scores better in the ranking model than a lower average alumni giving rate.

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3. Exclusions - inactive, deceased, no valid address, do not mail, do not contact, and do not solicit.
<table>
<thead>
<tr>
<th>Individuals</th>
<th>Fiscal Year 2012-13</th>
<th>Fiscal Year 2011-12</th>
<th>Fiscal Year 2010-11</th>
<th>Fiscal Year 2009-10</th>
<th>Fiscal Year 2008-09</th>
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<td>Endowment</td>
<td>Donors</td>
<td>Operations</td>
<td>Endowment</td>
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## Comparison by Constituency & Gift Type

**New Commitments through December 12, 2012**

<table>
<thead>
<tr>
<th>Individuals</th>
<th>Fiscal Year 2012-13</th>
<th>Fiscal Year 2011-12</th>
<th>Fiscal Year 2010-11</th>
<th>Fiscal Year 2009-10</th>
<th>Fiscal Year 2008-09</th>
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<tr>
<td></td>
<td>Donors</td>
<td>Operations</td>
<td>Endowment</td>
<td>Donors</td>
<td>Operations</td>
<td>Endowment</td>
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<tr>
<td>Alumni</td>
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<td>$2,000,000</td>
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<tr>
<td>Parents</td>
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<td>$2,000,000</td>
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<tr>
<td>Subtotals</td>
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<tr>
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APPENDIX B (Question 3)

University of Virginia:  http://www.virginia.edu/governmentalrelations/

Virginia Commonwealth University:  http://www.govrel.vcu.edu/

Virginia Tech:  http://www.govrel_president.vt.edu/

Old Dominion University:  http://www.odu.edu/govtrelations

William and Mary:  http://www.wm.edu/offices/governmentrelations/index.php

University of California:  http://www.ucop.edu/external-relationships/


University of Washington:  http://www.washington.edu/externalaffairs/govrelations/

University of Michigan:  http://www.govrel.umich.edu/
APPENDIX C (Question Five)

DEFINING SOCIAL CAPITAL

1. People in groups who have something in common. Alums who’s “Capital” we can & do capture.
2. Varied in type & discipline: reputational; thinkers; opinion leaders; people glue, social standing.
3. The value of the sum total good will, participation and support the University has with all stake holders – How to monetize?
4. Properly defined, social capital must escape the traditional boundaries of the University & campus.
5. Capturing SC is dependent upon a values exchange between the university and the larger community – experienced as dynamic – and results in value added. Predicated on an attitude of giving and service.
6. (The creative process) creates the conditions for SC role & is directly tired to quality Education. Like a Two Way Mirror that reflects one to the other.
7. Involvement matters a lot – while it is easier for the arts & athletics, it truly matters for all. Involvement also develops shared vision & mission.
8. Opinion makers can matter a great deal- formal & informal – we benefit in identifying & engaging these key people.
9. The physics of SC reveal a change dynamic – whose elements affect each other & who, therefore benefit from influence & glue. It is the interaction that matters – and requires active listening.
10. Giving people the opportunity & inviting them to contribute what they already value themselves is a precious first ingredient that builds synergistically.
11. Invite people to discover what goes beyond what they “need and want” – the unique capacity of the University.
12. It is “bigger” than just people - or even the process –it does become Institutional – Is there a theoretical limit??
13. Social Capital is developed through positive experiences, which are integral to its advancement!!
14. Some parts of SC are interchangeable but all would benefit from some form of measurement.
15. Technology is expanding the growth potential, the power and the importance of SC – new leverage is rapidly being created for potential capture. Allows us to think of building community in new refreshing ways.
17. “Power Exchange” between people who use their own agency to exchange with others - and in the process grow.
APPENDIX D (Question Five)

SOCIAL CAPITAL TASKFORCE HOMEWORK

Answer FOUR questions
1. What is an important step (action) to take that advances SC?
2. Recommend a “bold” idea: If you knew you/we couldn’t fail this is what would you/we do?
3. An insight that informs/contributes to the invention/creativity of the “third wave” for higher education that flows out of the formation and productivity of Social Capital
4. Give an example of “social capital” that you have experienced or are aware of from some other setting that you think Mason might explore.

BUILDING THE TENT

Sense of Space & Emotional attachment
1. Curriculum (MOOCS; special topic opportunities for alums, for example)
2. Spaces
3. Arts
4. Sports
5. Community Partners
6. New Technologies & Communications
7. Affinity Groups
8. Building Identity

CONTITUENCIES OF SOCIAL CAPITAL

Boundaries are changing
1. Alumni (citizens forever)
2. “Friends” Groups and Advisory Boards
3. Voters & Political Leaders & Subdivisions
4. Faculty
5. Opinion Leaders
6. Employers/P
7. Students & Future Students
8. Parents
9. Community Partners
10. Governing Bodies and Agencies

CHALLENGES OF MANAGEMENT, GOVERNANCE AND AFFINITY

1. Create a Foundation oriented University; But, Invent a New Affinity based model!!
2. Tribal!!!
3. Identifying and investing in Brand
4. Platforms really matter

MONETIZING

1. Great feelings – interactivity experienced ----
2. Finding needs
3. DC Regional Leadership Institute – connectivity around the Region

Funding & Resources Working Group, Page 61
APPENDIX E (Question Five)

Social Capital Initiatives

FACULTY AND CURRICULUM
1. Charlie’s communiversity
   Citizenship Education
2. “Tie in” to other vision outcomes
3. Harmonizes
4. Fusion
5. Use of technology to amplify 7 expand the themes of the “vision” series and beyond.
6. Service Day for the University.
7. Mason Cares Day!
8. Integrate into a capstone experience.
9. Belonging accountability to others.
10. Diversity matters

ATHLETICS
1. Start Football.
2. New Patriot Center at Shirley Gate Complex
3. Leverage & Integrate with Arts@Mason
4. $100 million for Athletic Facilities
5. Soccer/Lacrosse - no track needed
6. Use existing Social Capital structures to support athletics
7. Physical well being reach to entire Mason Nation
8. Focus on “citizenship”
9. Pioneer in curriculum - high skill level discipline
10. Build expanded club opportunities
11. Build air-waves power & headline
12. Huge shows
13. Community Athletic School/Facility & fields
15. Ice Skating Rinks – ditto
16. Mobilize Mason Nation
17. More Doc Nicks & Sports music facility -$20 million
18. Athlete adopt a kid program
19. Globalize soccer – International DC United
20. Men’s lacrosse
21. Pick a sport for a US Olympic research site

ALUMNI
1. Hot bash alumni weekend
2. Hip bars in key cities world wide
3. Mason Alumni 5 or 10 K
4. Freshman resident alum strategy
5. More affinity alum experiences
6. First Night! Candle lights
7. Martins Project 150
8. Foster alums- all members of the Social Capital community
9. Alumni Café
10. Develop experiences for the non-traditional student – leading to the on-line
11. Traveling faculty speakers
12. Shared “Book” experience
13. Strengthen alum recognition & honoring- raise their profile
14. Massive research effort to get all email addresses
15. Build an Alumni Center
16. Virtual connections lead to the personal
17. Master customer service to/for students
18. Leading to Satisfaction
19. Continual communication
20. “Year of the Arts/Sports- etc” calendar
21. Build the menu of opportunities for connection
22. Back to school program
23. Remember the value of “5 year” reunions
24. Keep email addresses alive
25. Network events featuring great speakers for grad alumnus
26. Building special focus for non-resident students
27. Instill the responsibility of giving & build a solid alumni budget
28. Build on-line model for alums
29. Alumni College
30. Model Ritz Carleton’s – customer service oriented

ARTS
1. Manage NOVA arts facilities i.e., Schlesinger, Lorton
2. Re-invent the idea of “arts center”
3. Off campus Theater, Arts School, etc
4. Fix transportation access
5. Budget for campus curator
6. Marching Band
7. Annual Sing a Long – other than Holiday songs. Rock
8. Maximize Smithsonian relations
9. New Celtic Music – non Xmas
10. Free Parking
11. National summer Arts Thing
12. All generations & levels
13. Broadcast in Total
15. World Class Museum
17. National leader in Arts Education.
18. Bring FF Symphony into the Tent.
19. Governors School to PW
20. World's Fair of Art
21. Infuse University curriculum into the Arts – Pool of $
22. Mason Pond xmas event
23. License game products
24. Fund 10 year arts master plan - $150 million
APPENDIX F (Question Five)

SAMPLE ANSWER TO SOCIAL CAPITAL TASK FORCE QUESTIONS
AND THE "THIRD WAVE" PROPOSAL

Continuing Education for Citizenship
A proposed Social Capital Initiative
CHARLIE JOYCE

Background: Political choices in our society are increasingly based on emotional responses stoked by interest groups based on distorted or misleading "facts". There is a need for continuing education in "citizenship", the art of playing an informed and useful role as a voter, advocate and community leader at the local, state and national level. The university can engage the community around this task.

Concept: Use an on-line curriculum model to engage individuals in the community in the study of contemporary issues such as energy, transportation, tax policy, immigration, climate and health care. Offer "graduates" support for forming new - or linking into existing - advocacy groups based on the interests thus developed.

Details:
1. Use the Marginal Revolution University or a similar platform as the primary education platform. The selected platform should include capabilities for group interaction, interaction with faculty, and continuing networking for "alumni".
2. Consistent with Mason’s mission as a regional asset, concentrate initially on regional or statewide issues; broaden interest later as the concept catches on.
3. Continuing education should not be limited to, nor focused solely on, the retired population. Minimize obstacles to participation by those still actively employed.
4. Coordinate with OLLI. This proposal implies more structure and academic content than the OLLI program, but would be of interest to many OLLI members.
5. Coordinate with Leadership Fairfax and other groups engaged in developing community-focused leaders.
6. Seek grant support for startup costs, ongoing support from participants in the form of tuition and gifts.

Comparison with Harvard’s Advanced Leadership Initiative:
Unlike Harvard’s program, this program does not envision moving to another state for a year; is not by invitation only; is not limited to individuals with a high degree of demonstrated success in a career to be left behind; is intended to develop more informed and active citizens rather than executives in large non-profit organizations. Like Harvard’s program, there is a stress on applied learning, and the possibility of creating networks for individual engagement in the future.