The webcast will start at 1 p.m. Eastern

- Visit capincrouse.com/fund-development to access these materials from today's webcast:
  - Handout
  - Recording
- To receive CPE credit you must respond to the polling questions, which are not available on mobile devices. To receive CPE credit you must log in on a computer.
- CPE certificates will be emailed to you within the next few weeks.

CAPINCROUSE LLP

Fund Development

Bryan Taylor, Chief Investment and Executive Officer
Cornerstone Management
Dan Campbell, Partner, CapinCrouse
7.25.19

CORNERSTONE MANAGEMENT

CAPINCROUSE LLP

Planned Gift Usage – Trends

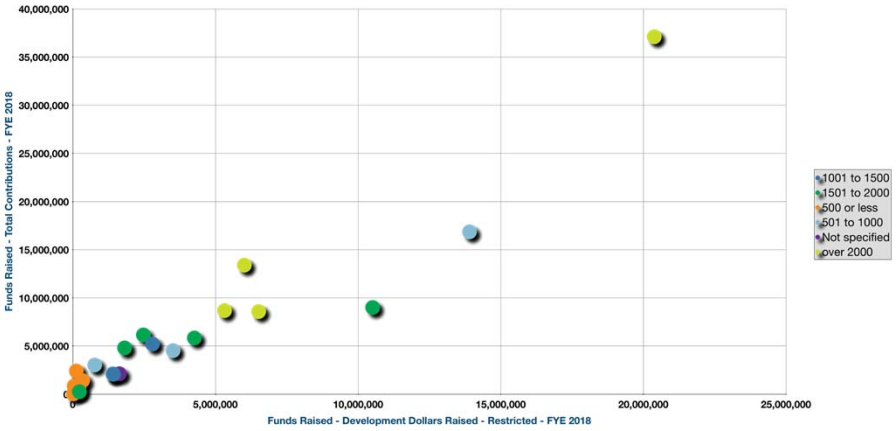
- During the 2017/2018 Fiscal Year, the Data Warehouse participation universe was opened to more participants. Consequently, we expect more data over time.
- We thank you for your participation and ask that you encourage other faith-based colleges, universities, and seminaries you know to participate. As additional responders are added to the system, the relevance and significance of the data increases.
- We are looking for additional questions. Please do not hesitate to pass such questions on to CapinCrouse or Cornerstone Management, Inc. leadership.
- Ultimately, we want to make this data more robust, comprehensive, and useful for all participants.

Question

Do you want CPE for this webinar?

Planned Gift Usage – Trends

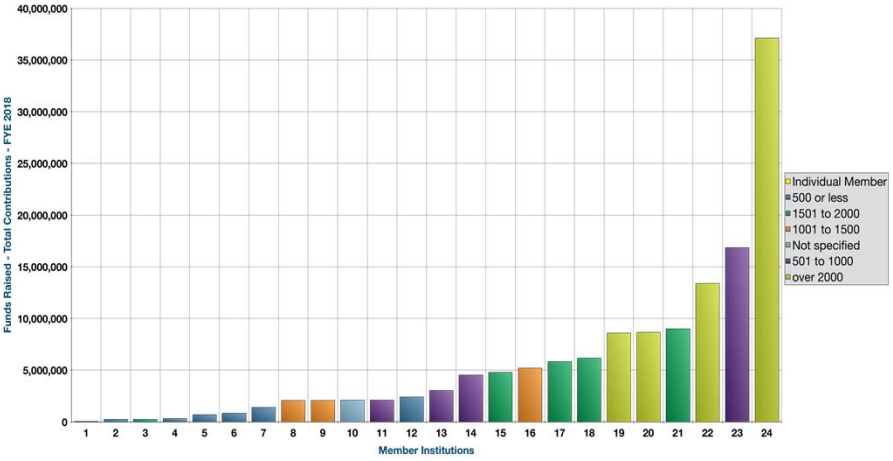
In most cases, restricted funds make up a large percentage of total funds raised.



As always, there are a few outliers.

Planned Gift Usage – Trends

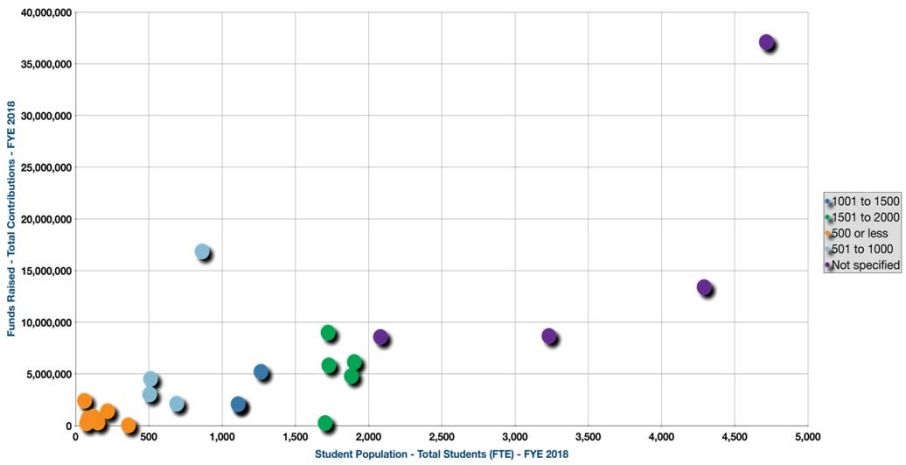
Across the data set, total funds raised vary significantly… institution size does not seem to be the only determinant factor.



Larger institutions generally raise more money, but not in a uniform fashion.

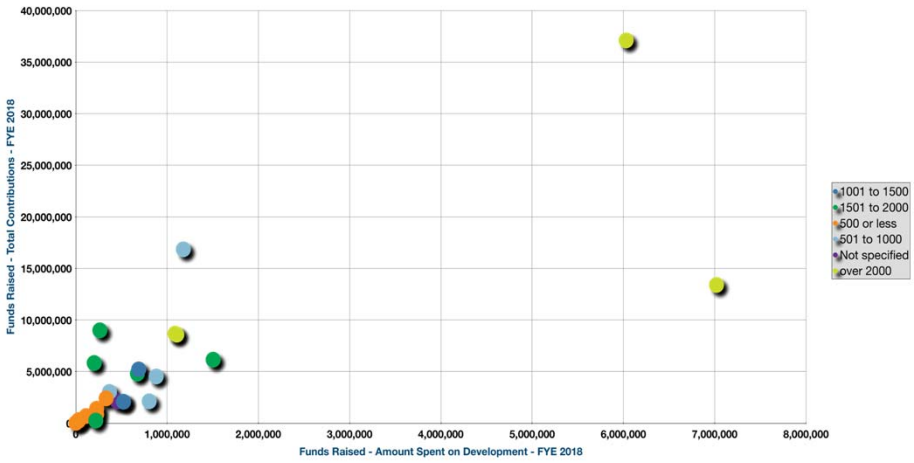
Fund Raising – Observations

In general, it seems that the number of students is not highly correlated to total funds raised… although one might note that very small institutions clearly struggle to raise funds.



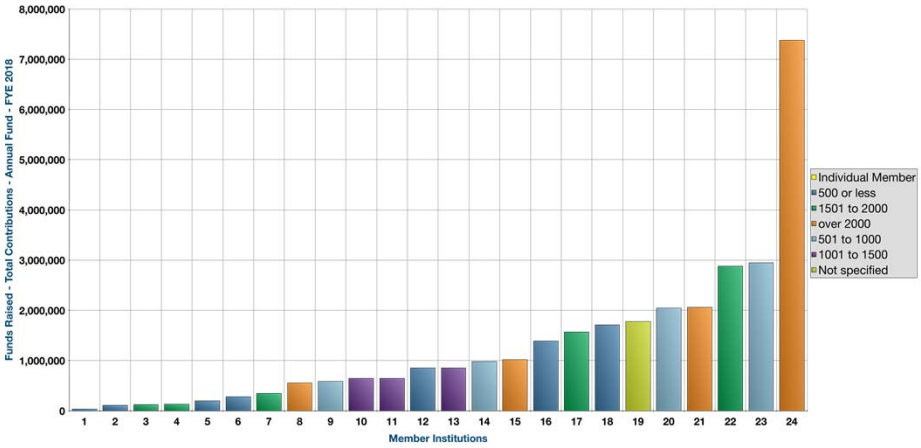
Fund Raising – Observations

However, it does appear that larger institutions are spending more on fund development than smaller institutions.



Fund Raising – Observations

Most institutions generate some funding through their Annual Fund; however, it is not clear how important this source of funding is to most ABACC institutions.



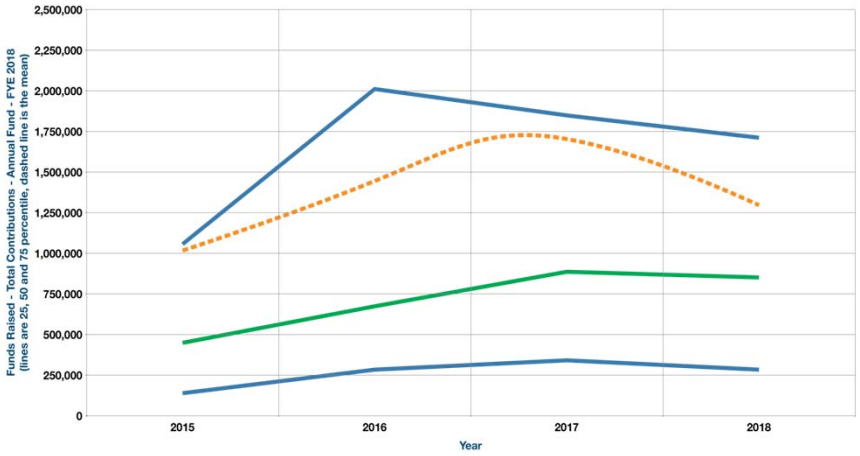
The data appears to be only minimally size-dependent.

Fund Raising – Observations

- Respondents raised approximately $127.5 million between restricted and unrestricted gifts in the fiscal year 17/18. The average amount was approximately $4.5 million; however, a couple of outliers skewed the data upward significantly.
- Restricted gifts totaled significantly more than unrestricted gifts.
- Annual Fund dollars raised totaled approximately $31 million, averaging $1.1 million per respondent (somewhat lower than the previous year), and this number was also skewed upward by a small number of outliers.

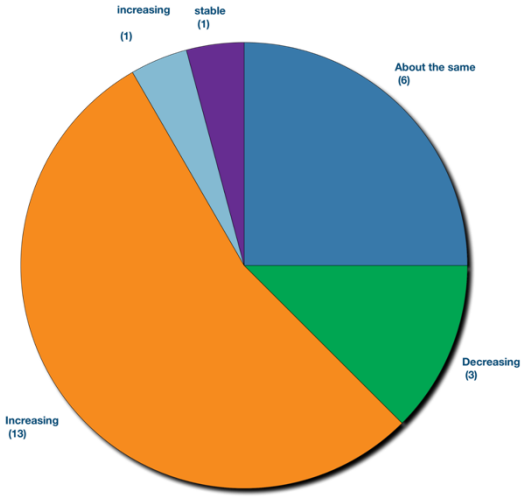
Fund Raising – Observations

Overall Annual Fund giving seems to have declined slightly during the most recent fiscal year. This may be related to positive market returns and tax considerations.



Planned Gift Usage – Trends

Institutions expect the use of planned giving to increase in the upcoming year… this is a positive departure from previous survey results.



Question

Does your institution put a focus on estate gifts in development efforts?

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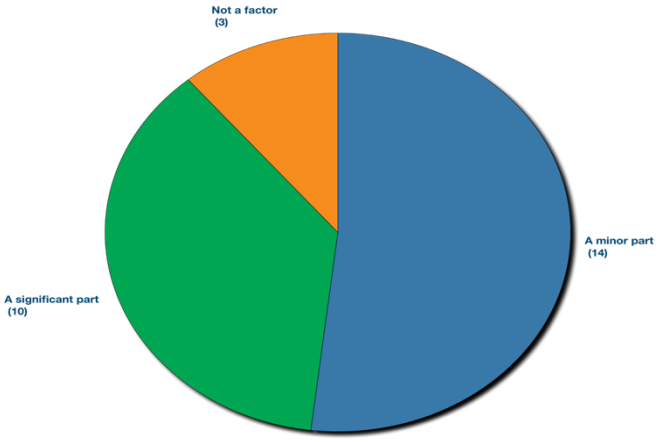
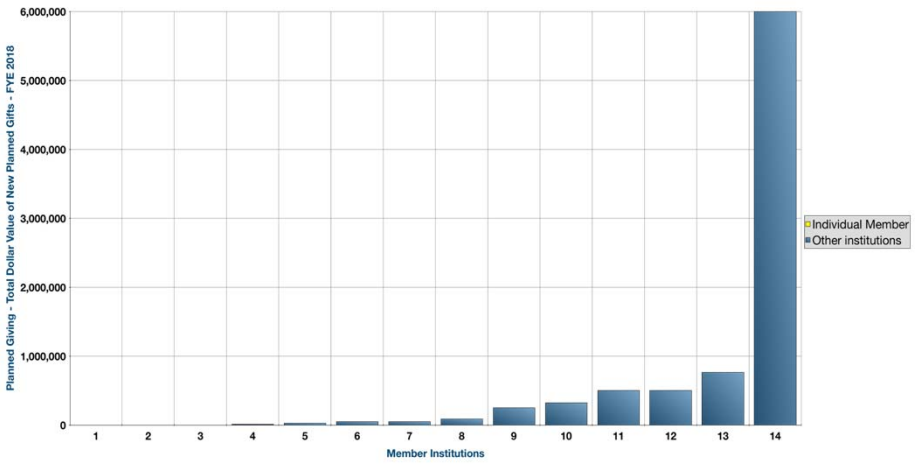
Are Estate/Planned Gifts Overlooked?

Most institutions agree that planned gifts play a part in their fund raising, with a significant number indicating that planned gifts are a significant component of their fund raising efforts.



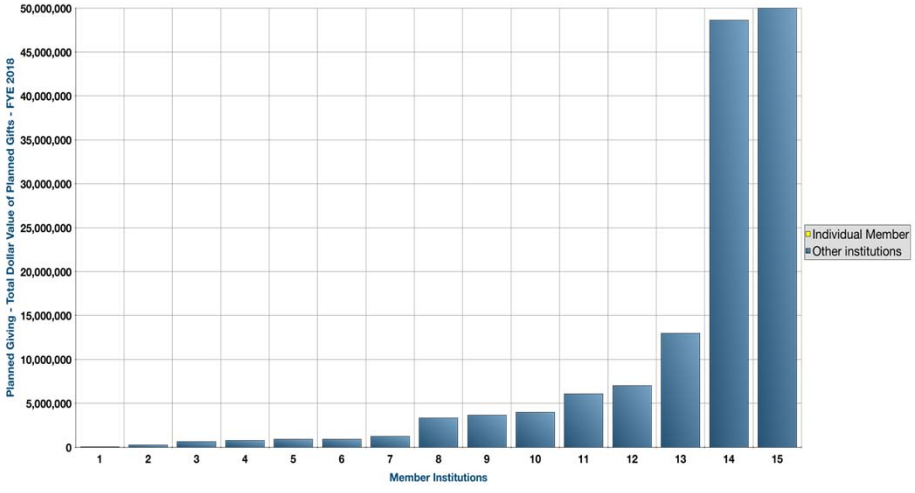
Are Estate/Planned Gifts Overlooked?

Despite noting that planned gifts are a component of their plan and that interest is the same or increasing, few institutions raised significant funds through these vehicles during the 17/18 fiscal year.



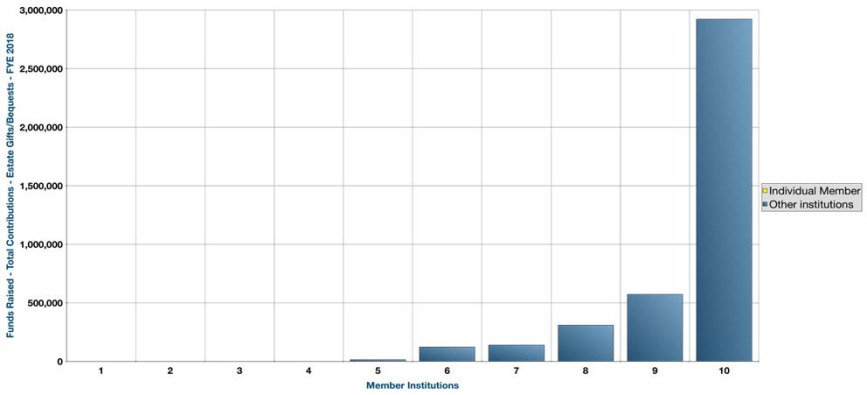
Are Estate/Planned Gifts Overlooked?

Regardless of size, most institutions appear to have relatively little total exposure to planned gifts.



Are Estate/Planned Gifts Overlooked?

Estates/bequests are excellent territory for development staff, but many institutions reported receiving only a small amount of them or did not report any information related to this data point.



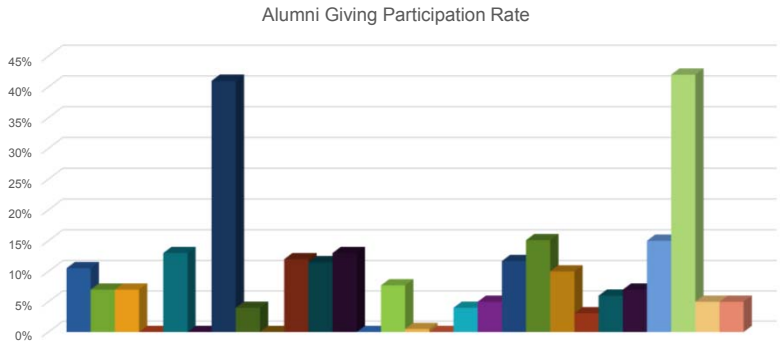
Consider using other planned gifts as a means of initiating a relationship that will culminate in an estate gift.

Planned Gift Usage – Trends

- Respondents appear to have raised about $4.1 million in Estate/Bequest funds; the average reported appears to be around $150,000. We suspect that more dollars were raised and that data was not reported… additionally, the average was skewed by potential lack of response and outliers.
- Gift annuities appear to be the most widely utilized deferred giving vehicle among ABACC respondents, followed closely by Charitable Remainder Unitrusts; and of course bequests are always a component of most deferred gift programs — this coincides with Cornerstone's experience across the broader evangelical nonprofit marketplace.

Marketing to Alumni – Deep or Broad

A relatively small portion of your alumni base will become active donors; however, there are a couple of significant outliers.



There seems to be little correlation between funds spent and active alumni donors — further, some small institutions spending little on fund development have the highest alumni participation.

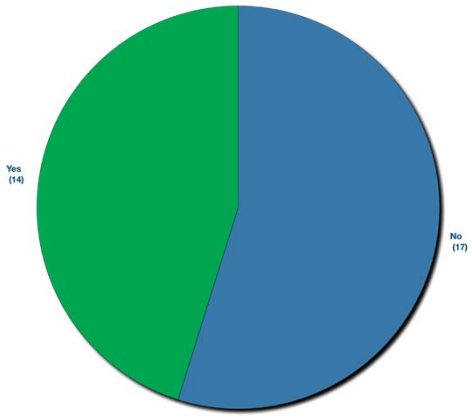
Question

Does the information contained in the Data Warehouse relative to Active Alumni Donors resonate with you?

?

Capital Campaigns

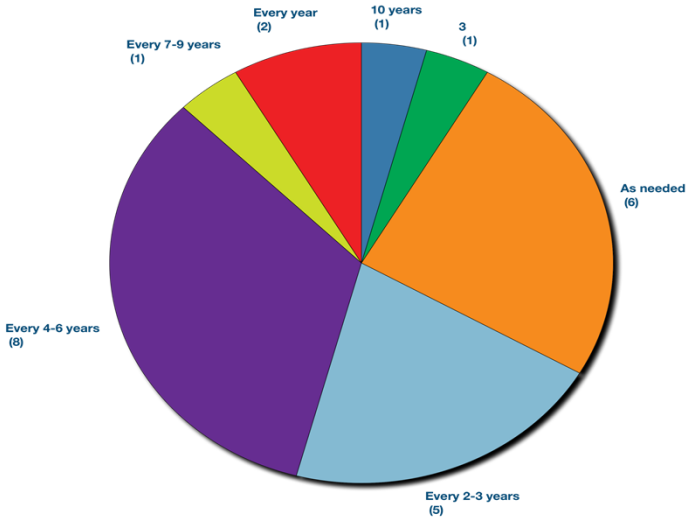
Number of colleges and universities currently involved in a capital campaign:



A significant percentage of responding institutions are currently in a capital campaign.

Capital Campaign – Frequency

How often should a college or university engage in a capital campaign?

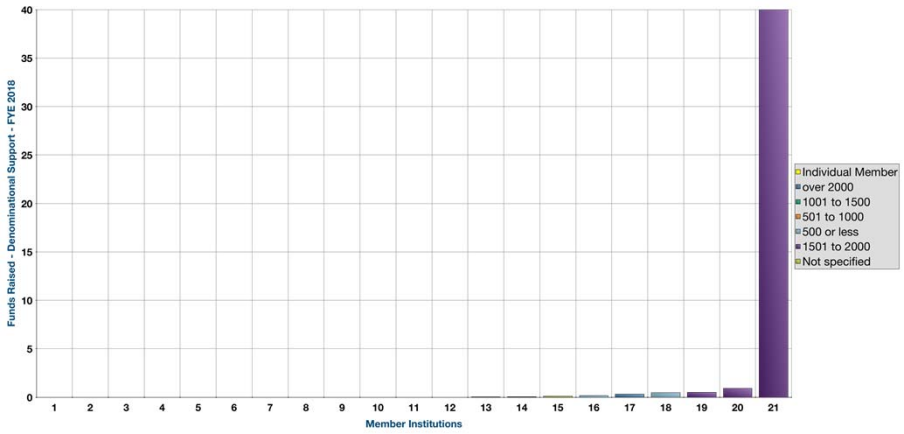


Question

Are your institution's capital campaigns generally tied to specific projects?

Denominational Engagement – Trends

A small number of responding institutions receive denominational funding; however, for those receiving denominational funding, it may be significant.



Disclosures

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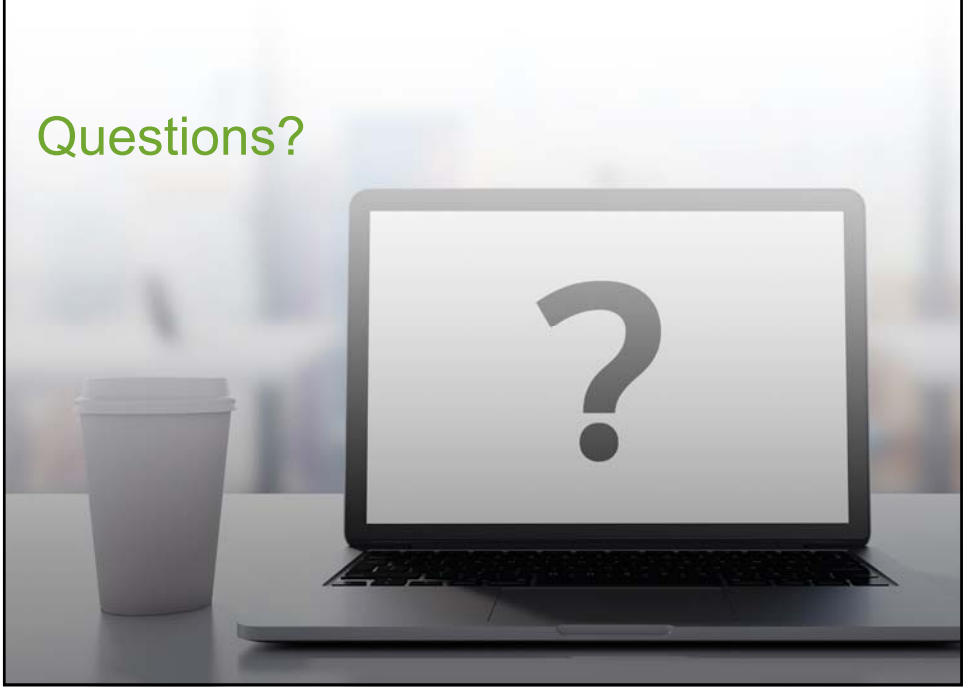
Questions?



Upcoming Webcast

Please join us! Learn more at capincrouse.com

Endowments
August 22
1 p.m. Eastern

Co-presented with Cornerstone Management.

Thank you.

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