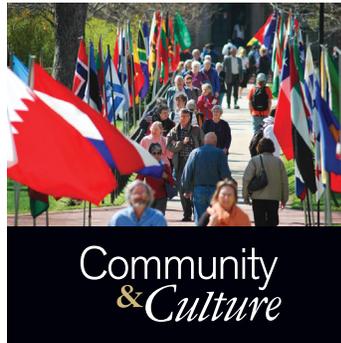
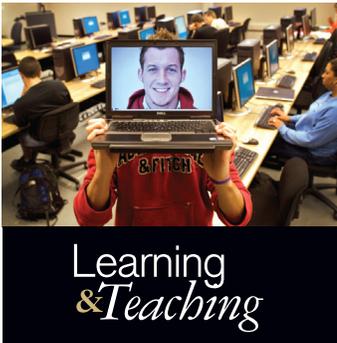


Campaign Fact Sheet



The Creating Futures Campaign

- *Creating Futures* is a comprehensive University of Colorado fundraising effort that is enhancing the university's four campuses on all fronts, and is enabling the university to advance the economy, culture, and health of Colorado and the nation at a critical time.
- *Creating Futures* will be announced publicly on April 18, 2011, and has been in a quiet (nonpublic) phase since July 1, 2006.
- By the conclusion of *Creating Futures*, the University of Colorado and University of Colorado Foundation will have worked together to raise \$1.5 billion for people, places, and programs on all four campuses.
- Throughout *Creating Futures*, fundraising for and by all CU units is a heightened priority, as CU and its Foundation strive to connect donor passions with fundraising priorities. The active participation and support of CU's academic and volunteer communities will be integral to the campaign's success.

Rationale for Creating Futures

- A comprehensive campaign helps CU make a public case for the importance of its work, in a time of extraordinary opportunity and extraordinary need.
- This is an ideal time to capitalize on current CU strengths.
 - There has been outstanding momentum and excitement for CU throughout and beyond our academic and alumni communities. With roughly 50,000 donors supporting CU each year, private support toward the university reflects this momentum.
 - The high caliber of CU's faculty, students, and programs make it more likely that increased resources will generate great outcomes in the near term.
 - Strong partnerships with communities, industry, and government enable CU's ideas and efforts to have a positive, far-reaching impact.
 - CU's strengths help us attract federal grants and research funding, infuse our communities with jobs and services, and power Colorado's economy.

Rationale for *Creating Futures* (cont)

- We must act now to ensure a strong CU for generations to come.
 - State higher-education funding has declined substantially: from nearly 30 percent of CU budget less than 30 years ago to less than 6 percent of budget this year.
 - Higher education must become accessible for more students.
 - There is great demand for solutions that enable us to leave the world better than we found it. Ideas emanating from CU—in areas ranging from energy to health care to public affairs—will be integral to overcoming some of the greatest challenges of our time.
 - Donor support provides the margin of excellence needed for a thriving CU, which in turn advances the economy, culture, and health of Colorado and the nation.

Campaign Leadership

- Bruce Benson fills dual leadership roles in this campaign, as university president and also as *Creating Futures* volunteer chair; his wife, Marcy, also is a chair of the campaign. The Bensons played vital roles as chairs of CU's prior campaign, *Beyond Boundaries*.
- The Campaign Leadership Team includes the Bensons as well as leaders from each CU campus, the Foundation, and our volunteer base.
- Independent leadership teams support the campaign on each of CU's four campuses. The volunteer campaign chairs on each campus are:
 - Jean ('64) and Jack ('64, '70) Thompson, University of Colorado Boulder
 - Nancy ('87) and Carl ('67) Eklund, University of Colorado Anschutz Medical Campus
 - Laura ('94) and Dave ('82) Baker, University of Colorado Denver
 - Ed and Mary Osborne, University of Colorado Colorado Springs

Campaign Communications Framework

- In communications, we are promoting four *pillars of excellence and impact*—four categories that represent CU's university's strength and breadth, aligned with its mission.
- The pillars are Learning and Teaching, Discovery and Innovation, Community and Culture, and Health and Wellness.
- *Creating Futures* fundraising priorities will have a transformative impact in one or more of these categories.
- As message consistency is vital for campaign effectiveness, campus leaders are using this framework in communications.

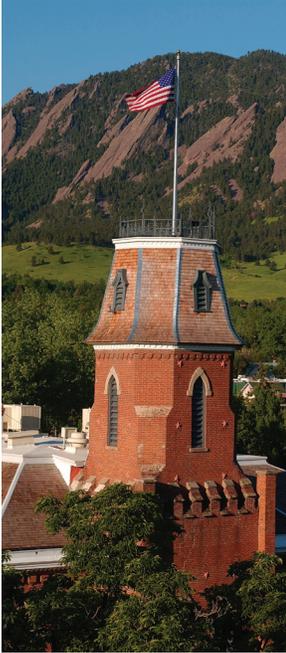
Campaign Fundraising Priorities

- *Creating Futures* priorities have been determined through a strategic planning process, directed by leadership on each of CU's four campuses, and are aligned with each campus's strategic priorities.
- While *Creating Futures* encompasses all of CU, fundraising priorities and communications focus on the distinct strengths, opportunities, and constituencies of each campus. These priorities are outlined in campaign donor brochures for each campus.

Campaign Fundraising Goals

- Fundraising goals have been set based on the trajectory of recent donor support and a review of CU's constituent base—donors and prospects, alumni, corporations and foundations, and others with interests in common with the university.
- *Creating Futures* priorities total \$1.5 billion. Yet *Creating Futures* is a campaign that emphasizes excellence and impact, rather than strict dollar goals. Its success is measured by its ability to fuel initiatives CU-wide that will transform CU's ability to achieve its vision.

Creating Futures and CU Campaign History



- More than 60 universities are currently undergoing campaigns. Others with campaigns of similar magnitude include Carnegie Mellon (\$1 billion), Virginia Tech (\$1 billion), and the University of Indiana (\$1.1 billion). Colorado State University and the University of Denver are each in the midst of campaigns.
- CU has completed three fundraising campaigns: *Second Century Campaign* (1974-79, \$14 million), *Frontier 2000* (1987-1993, \$271 million), and *Beyond Boundaries* (1996-2003, \$1 billion).
- *Creating Futures*, the fourth campaign in CU's history, began July 1, 2006. Since this time, the campaign has been in “quiet” phase—a standard campaign period in which private gifts count toward the overall goal and awareness builds among key internal constituents.
- In this period, the University of Colorado Foundation—which raises, manages, and invests private support on behalf of CU—has strengthened its operation by: collaborating with university leaders on campaign strategy, setting administrative guidelines such as counting standards, bolstering its personnel and training, and fortifying relationships with constituents who have passions for CU priorities.
- Also in this period, CU has had its four strongest years ever for private support, despite substantial turbulence in the global economy.
- As of April 1, 2011, more than \$900 million has been raised toward *Creating Futures*. A traditional campaign-launch benchmark is that roughly 50 percent of the campaign goal be raised before “going public.” The progress of *Creating Futures* is consistent with this benchmark.
- The April 18, 2011 public announcement of *Creating Futures* is paralleled by campus events in the weeks surrounding this date. A campaign celebration for CU Denver and the Anschutz Medical Campus occurred February 24. CU-Boulder's campaign celebration occurs April 28, and UCSS's campaign celebration occurs May 12.

Donor-centric Fundraising

- CU and its Foundation are promoting a “donor-centric” fundraising philosophy throughout *Creating Futures*. Rather than focusing solely on *our* goals, this approach engages donors by listening to them, eliciting their own passions, and helping donors find ways to achieve their philanthropic goals at CU.
- CU's comprehensive scope makes this approach ideal, as the university has priorities that align with a vast array of prospective donor interests.
- This approach has been conceived and presented by development consultants Advancement Resources, which has to date trained the majority of CU Foundation staff and more than 200 CU faculty, staff, and volunteer leaders.
- Development staff at universities such as Harvard and Stanford have also been trained in this approach, which is based on research about “why people give.”
- This training will continue to be offered to campus and volunteer leaders in the months to come.



CU in the Future: A Planned Giving Initiative

- In times of economic uncertainty, planned gifts hold increased appeal for prospective donors. A planned gift is a way to make a philanthropic commitment using giving vehicles (such as bequest commitments, IRA beneficiary designations, trusts, annuities, and real estate) that realize at some point in the future, or through a “blended” combination of present and future commitments.
- In conjunction with *Creating Futures*, the CU Foundation has initiated *CU in the Future*, a subset of the *Creating Futures* campaign that promotes planned-giving commitments.
- CU donors increasingly see planned giving as an effective route to achieving their philanthropic aims. For the 2010 fiscal year, estate-gift commitments increased by more than 700 percent over the prior year, and 2011 estate-gift commitments already exceed the 2010 total.

Counting Standards

- There is no single universally recognized standard by which universities count private campaign support: university funding streams can be complex and variously defined. In the quiet phase, we have reviewed standards at peer universities to assess best practices and establish standards that fairly gauge the financial progress of *Creating Futures*.
- Funds counted toward the *Creating Futures* goal include private support and pledges made directly to the CU Foundation, as well as directly to the university.
- Both *current* private support¹ and *endowed* private support² are counted toward the *Creating Futures* campaign total.
- Many planned gifts are not realized until a future point in time (such as bequests, which are realized after a donor's death). While such commitments are tracked by the CU Foundation to help gauge future revenue streams, planned estate gifts such as bequest intentions and IRA beneficiary designations are *not* counted toward the *Creating Futures* campaign total.

¹disbursed to CU in full to support current priorities

²of which a percentage is distributed at regular intervals to CU, with the principal invested in CU Foundation-managed endowments to maintain stable funding, generally in perpetuity



Responses to common questions about *Creating Futures*

FAQ

Universities are always fundraising: what is different during a campaign period?

A university campaign is a supercharged period for fundraising: it gives CU and the CU Foundation a defined period in which to organize the university's strategic priorities, align them with the passions of prospective donors, mobilize fundraising resources, and publicly promote CU's strengths, challenges, and opportunities.

Many organizations use the term "capital campaign" to define a time in which a single major project, such as a new building, is supported. But the scale and breadth of CU—where, for example, dozens of capital projects are ongoing at any time—requires us to choose a specific period in which to intensify our fundraising efforts, and make a comprehensive case for support of CU.

What is my role in this campaign?

This campaign is a partnership, and as a key volunteer or campus representative, you play a crucial role. By advocating for the importance of private support in your field and for CU as a whole, you strengthen the university's ability to achieve its goals, and your ability to achieve yours.

The CU Foundation has many resources that can assist your advocacy on behalf of *Creating Futures*. From brochures on subjects ranging from planned giving to endowments, to individual development guidance, CU Foundation representatives will work with you to maximize our joint efforts toward common goals.

In tough times, shouldn't CU focus more on student aid, and less on buildings?

Making college affordable for students is indeed a high priority. The *Creating Futures* campaign will aggressively promote the need for student aid, to supplement aid from university budgets and state and federal sources.

The university also has critical infrastructure needs, exacerbated by a growing student population and evolutions in technology, research, and teaching. Amid belt-tightening by public entities, it is difficult to build new buildings and renovate old ones without private support: even in tough times, the university must maintain and upgrade its infrastructure.

Costs for major capital projects often fall outside of university budgets. So campus leaders can focus funding on existing programs and keep tuition manageable, major capital projects are often highlighted to private donors, along with the ever-present need for student aid.

Q Why isn't the campaign focused on a dollar goal, when that is campaign tradition?

A *Creating Futures* will highlight the *outcomes* of private support toward CU. Research indicates that donors are motivated less by achieving a cumulative dollar goal, and more by seeing their gifts generate positive outcomes.

In a nutshell, *Creating Futures* is a campaign of excellence and impact. It will be successful at the end of the campaign if CU is substantially more able to:

- Enhance learning and teaching so thousands more students can receive a CU education.
- Spark discovery and innovation to accelerate solutions in fields such as energy, sustainability, and education.
- Transform community and culture to enrich our surroundings and ensure a better quality of life.
- Improve health and wellness outcomes to help people live longer and better lives.

While we anticipate raising approximately \$1.5 billion to support *Creating Futures* priorities, this campaign will be a catalyst for great ideas whose value will far exceed their cost. For this reason, you will hear more about the impacts donors make on CU's outstanding people, places, and programs. Advancing Colorado is the goal of *Creating Futures*.

Q How long will this campaign last?

A The campaign will continue until it meets its strategic benchmarks, which should occur within the next four to five years. During the recent economic downturn, many universities in the midst of time-constrained campaigns were suddenly presented with the need to either prolong their campaign, or change their goal. By not adhering to a hard-and-fast end date, *Creating Futures* leadership can remain true to campaign priorities while recognizing that unusual economic times may call for added flexibility.

Q How can we keep track of campaign progress?

Regular updates will be available from campus and foundation leaders in internal and external communications, including cufund.org and the CU faculty/staff newsletter. Academic partners with assigned development officers can also receive updates directly from them related to their specific funding priorities.