

UNIVERSITY OF KENTUCKY BOARD OF TRUSTEES

Jake Lemon, Vice President for Philanthropy and Alumni Engagement



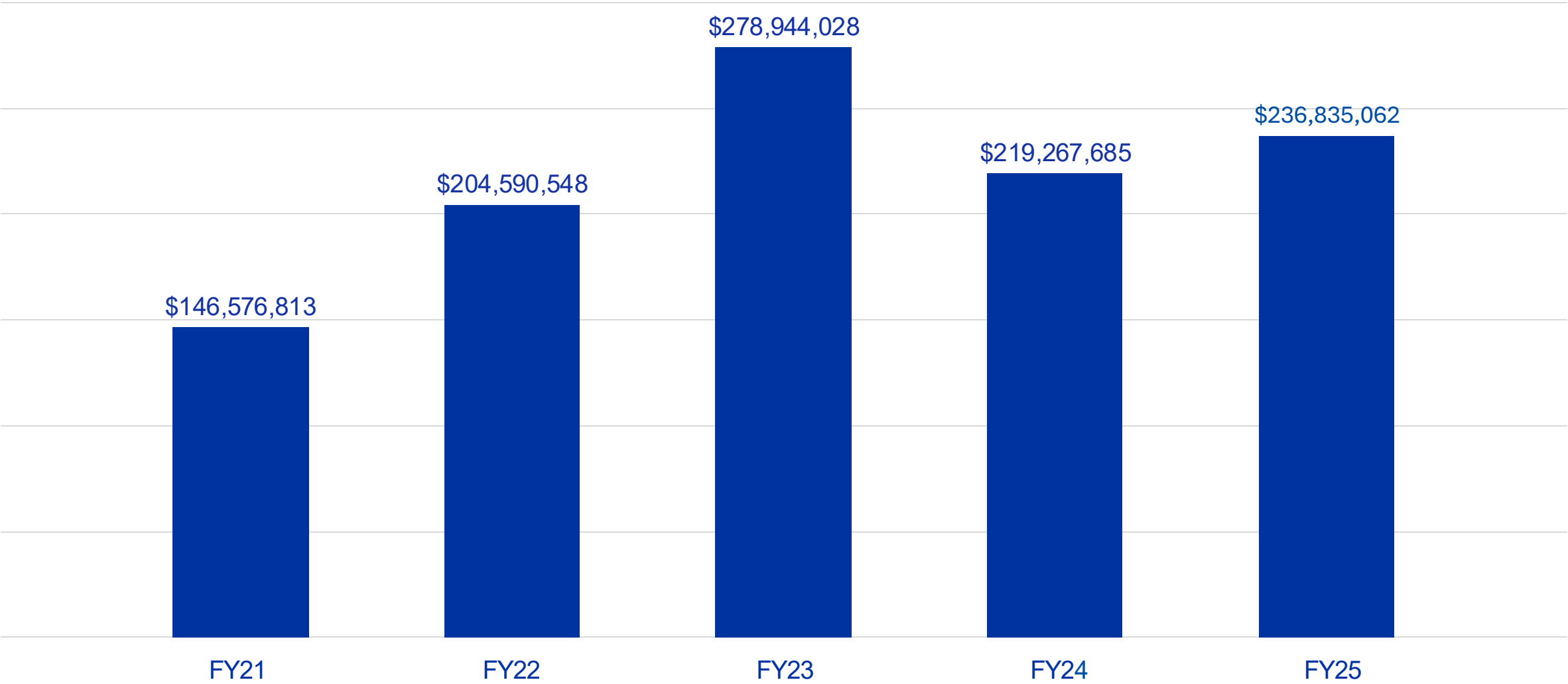
Agenda

- Production Comparison
- Scorecard Update
- Big Beautiful Bill and Philanthropy

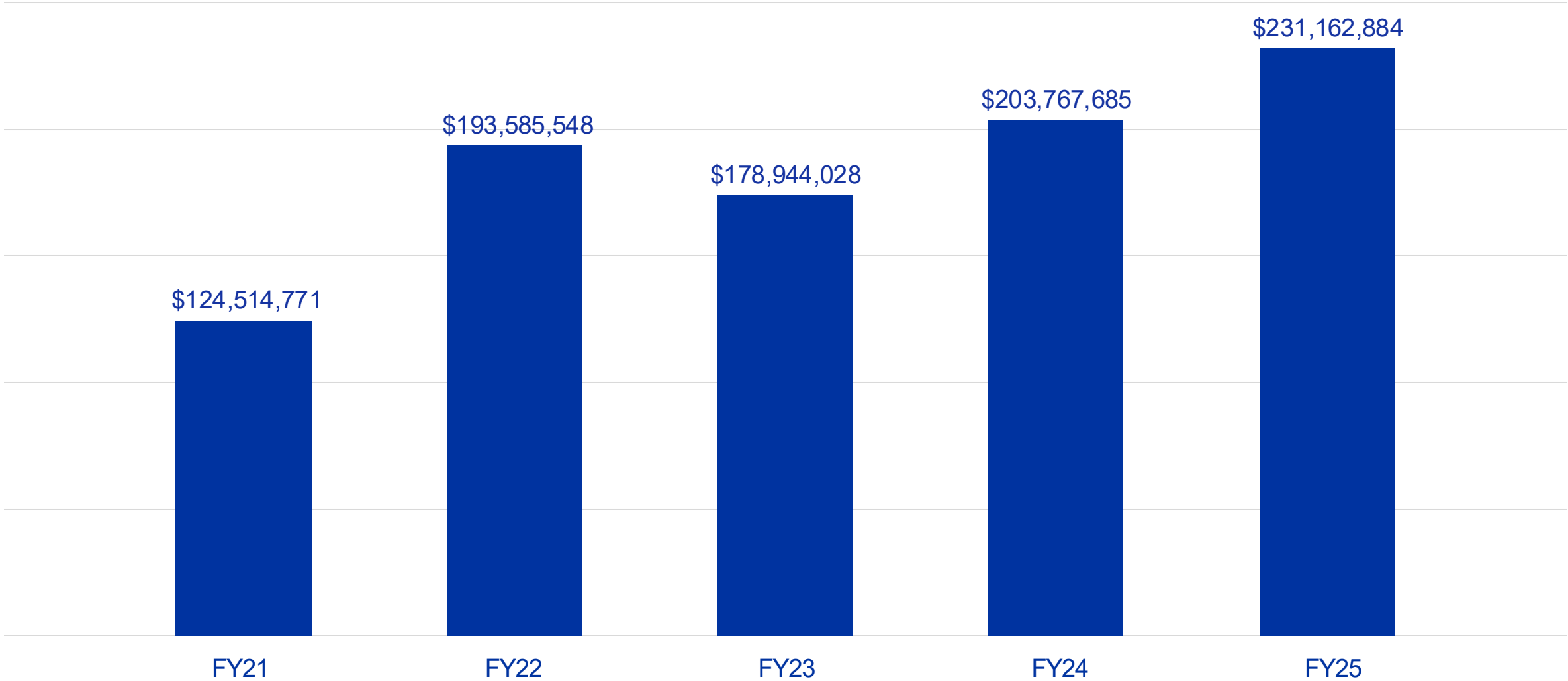


PRODUCTION

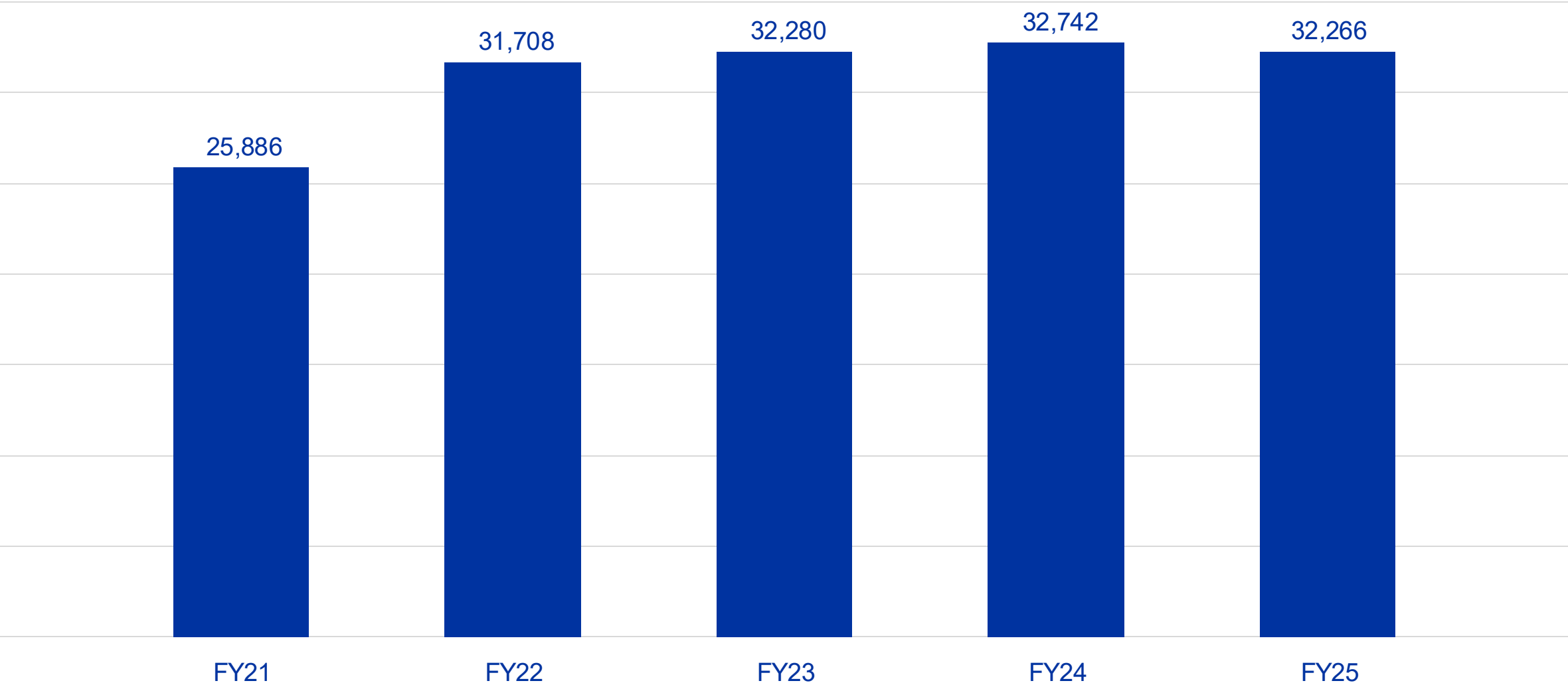
Fundraising Totals by Fiscal Year



Fundraising Totals by Fiscal Year — Largest Gift Removed



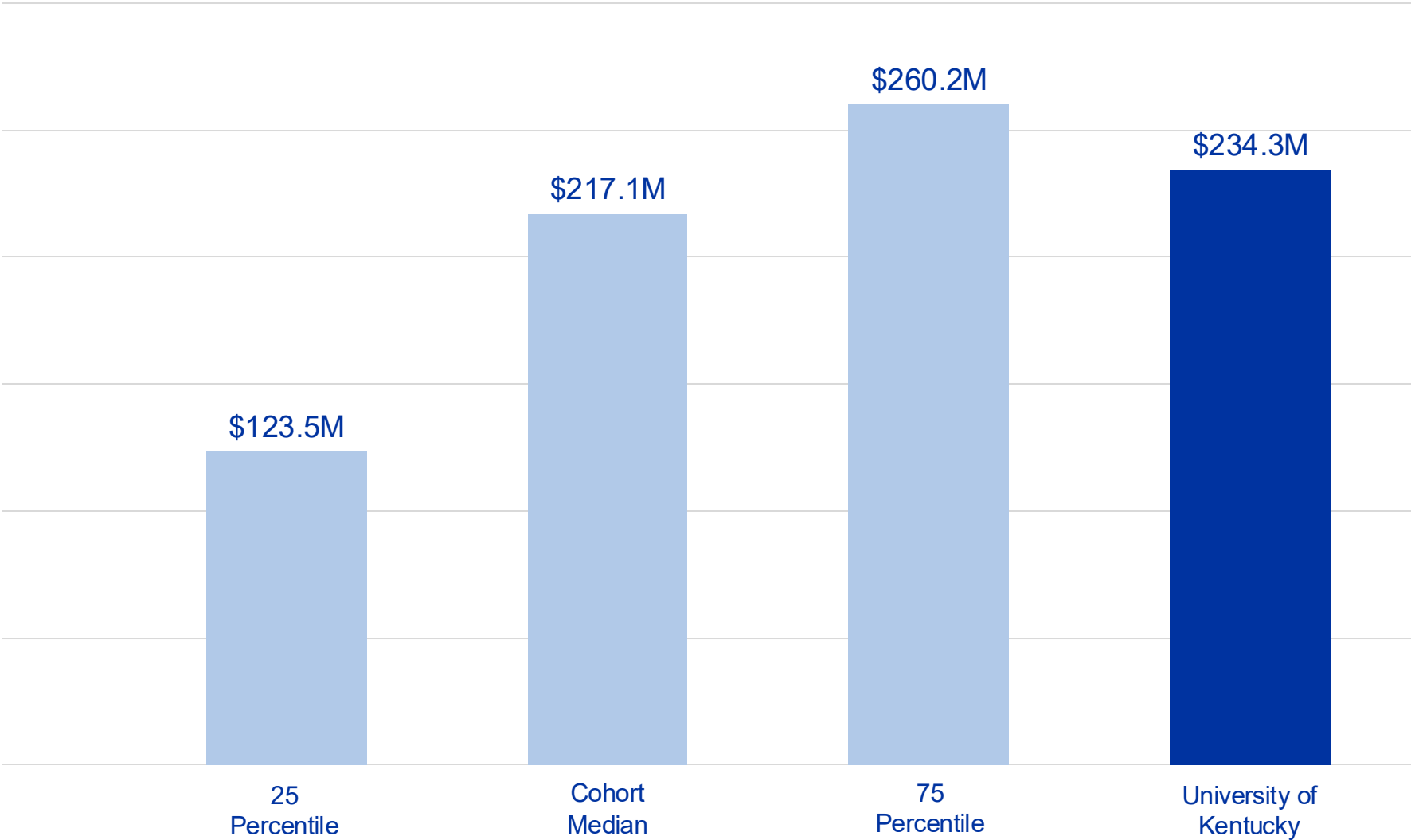
Total Donors by Fiscal Year



PEER COMPARISON



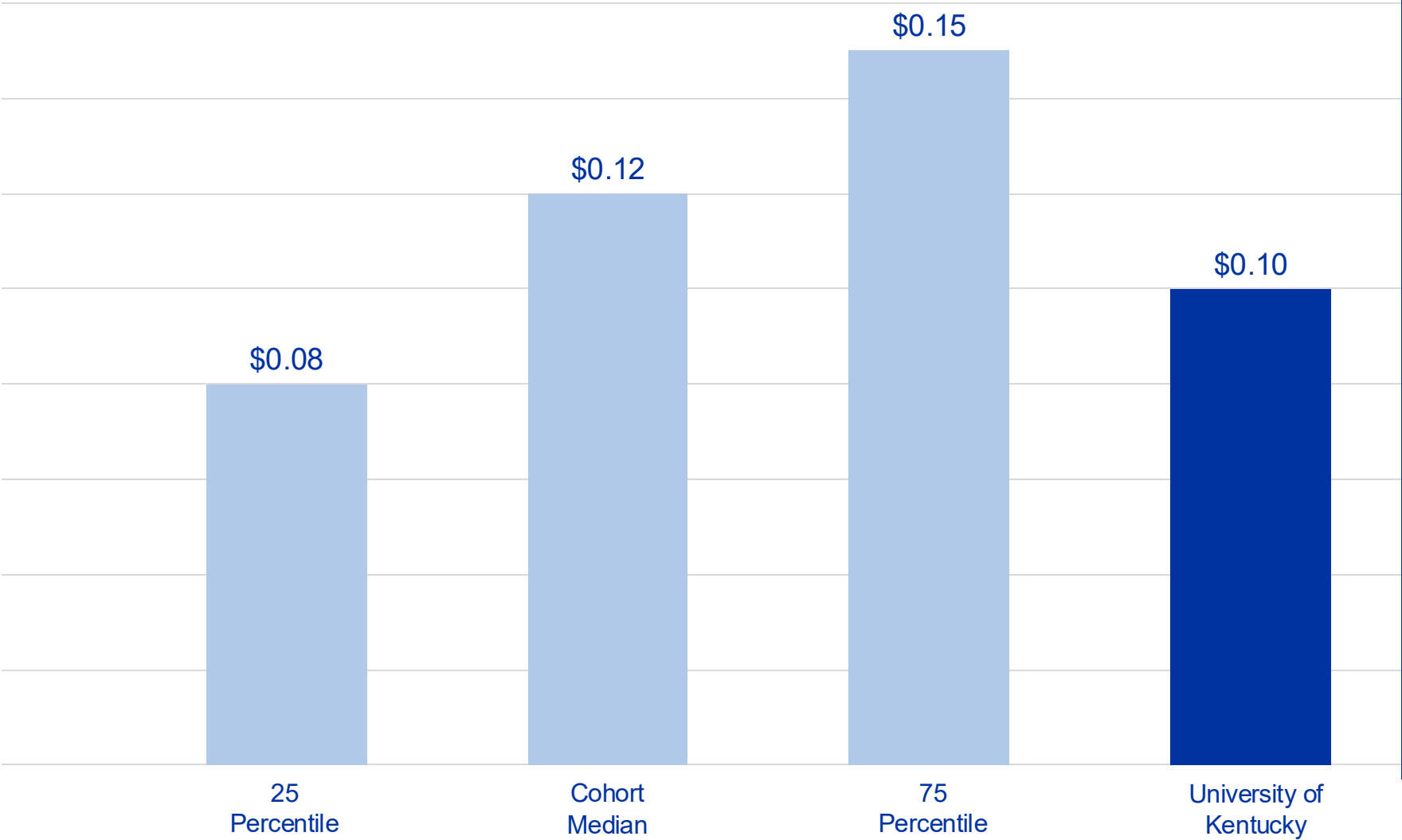
Total Fundraising Production



Fundraising production includes the full face value of new gifts/pledges. It excludes payments on past pledges.

To accurately capture each institution’s typical performance, this data draws on the averages from three consecutive fiscal years (FY22-24).

Cost To Raise A Dollar

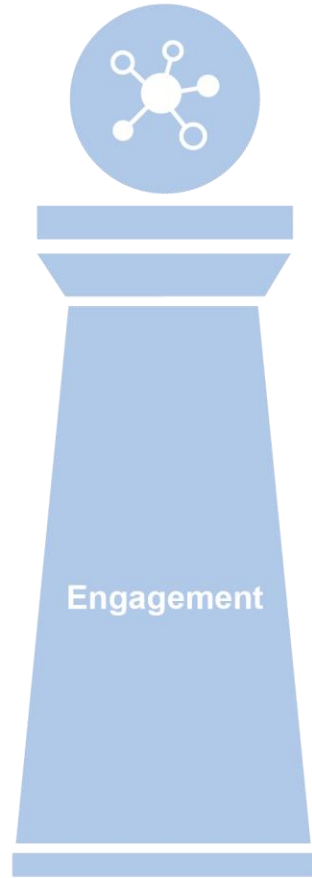
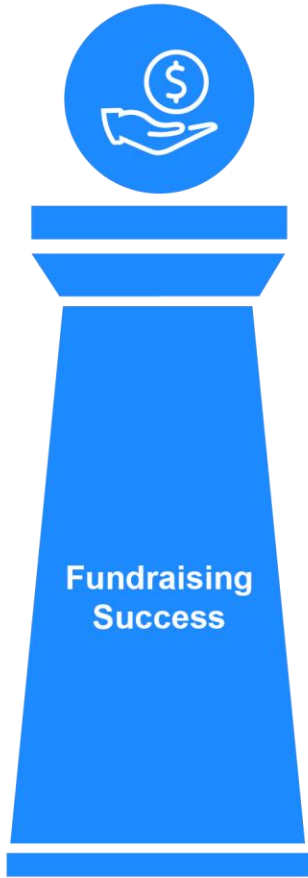
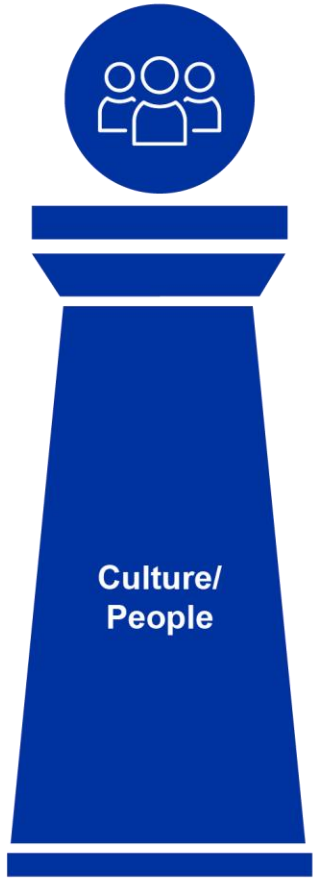


Cost to raise a dollar helps show the investment necessary to generate fundraising revenues. While it is a useful metric in the context of performance indicators, take care to consider it within the context of other performance indicators, especially net fundraising production.

Since institutions strive to minimize the cost to raise a dollar, the highest performers report the lowest values.

BALANCED SCORECARD

Four Pillars of Focus



BALANCED SCORECARD

- Talent Management
- Portfolio Management
- Constituent Engagement
- CRM Integration



THE BIG BEAUTIFUL BILL AND PHILANTHROPY

Provisions

- Charitable deduction/Non-Itemizer
- Deductions for the wealthiest donors
- Corporate-giving tax breaks
- Historical context



JUST THE

BEGINNING



QUESTIONS

