

Development Update

COLLEGE OF BUSINESS

Development Talking Points

Imagine a business school that.....

- ✓ ranks in the top 1.4% of business programs in the world (AACSB)
- ✓ ranks in the top 75 of business schools in the U.S.
- ✓ whose Accounting Program continually places in the top tier nationally and in the state for CPA Pass rates
- ✓ whose Insurance program is one of the largest in the country
- ✓ whose sales and international business programs provide unique preparation found at only a select number of universities
- ✓ who has seen an annual increase in freshman enrollment of 39% over the last several years

Creating bold, Compassionate leaders with Passionate minds:

- The College of Business at Illinois State University is now considered the first choice for undergraduate business education in the State of Illinois.
- Our alumni strengthen the state and nation through their business activities that create jobs and enhance the standard of living.
- The COB has a focus on preparing skilled and ethical business professionals who make significant contributions to organizations, to communities, and to society.
 - Arming students as alumni with the mindset to make positive/impactful change in their communities and organizations – the economic and societal impact will be significant as our alumni think broader about making a difference beyond themselves
- The COB is strategic in its thinking regarding the impact, engagement, and innovation for the development of the next generation of industry leaders.
- (Share examples/stories of student/alumni success)

Wow: Change perspective, Change organizations, Change the world!

Ongoing budget uncertainty from the State of Illinois threatens our personal/experiential learning environment and ability to attract and retain the best faculty. High demand for our programs from prospective students, and a need for quality employees by industry --- well skilled in their fields with a focus on quality, ethics, and civic engagement, make Illinois State and the College of Business the right choice with an immediate urgency for funding.

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- Expanding Student Opportunity
 - Scholarships/professional development (transformational experience)
- Attracting and Developing Top Faculty
 - National recognition
- Paving a Professional Path
 - Internships, mentoring, professionalism –Center for Career and Professional Development
- Sustaining Excellence
 - Unrestricted dollars to remain flexible, seize opportunities, respond to change
- Reaching Beyond Campus Boundaries
 - Centers and institutes – financial literacy & data analytics
- Fueling interdisciplinary Innovation
 - Champion out of class experiences for students where they can think, adapt, and solve real problems affecting organizations, society and the world.
 - Interdisciplinary teams of students and faculty working on community and industry based consulting projects (Innovative Consulting Initiative)
- Stimulate immersive cultural opportunities enabling students to gain broader experience and perspectives.
 - Increase the number of students and faculty that study abroad (from 2% to 25%)

What would you like to accomplish with your investment that would be most meaningful to you?

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Development Update:

Annual Gifts by Fiscal Year

2016	\$2,567,892	2013	\$2,621,715	2010	\$3,782,650
2015	\$3,220,121	2012	\$4,084,605	2009	\$1,759,824
2014	\$8,369,576	2011	\$3,939,759	2008	\$1,015,490

- Current COB Foundation Expendable: \$3,174,209; Endowed/Invested: \$15,503,541.
- Between 2009 and 2014 the College of Business experienced a total increase of over 100% in the principal and expendable values of its foundation funds.
 - ✓ 105.7% increase in principal
 - ✓ 22% increase in expendable
- Total COB Foundation Funds: 152
- Total annual alumni donors to the College of Business average 1,625 for the last six years.
- \$4,127,688 is the six year average for total dollars booked by the College of Business. The best year was \$8,369,576 in 2014 (43% of the University Total).
- Over the last five years the College of Business has documented deferred planned gift commitments of \$10,280,678 (95% of total). The College has 48 documented deferred planned gift commitments on the books with an aggregate total of \$10,864,689.
- Average total of foundation dollars spent annually by COB = \$1.5 million
- COB for Fiscal Year 2016
 - ✓ Total dollars booked was \$2,567,892 (total booked dollars down 19%)
 - ✓ 7 endowed scholarships; 5 restricted scholarships; 4 estate commitments
 - ✓ Alumni: \$1,247,803; Corp./Foundations: \$1,190,053; Friends: \$130,037
 - ✓ Student Support 42%; Faculty Support: 06%; Program Support: 52%
 - ✓ Cash: \$1,138,431; Pledges: \$929,462; Deferred: \$500,000
 - ✓ COB Alumni Donors to ISU: 2,376; COB Alumni to COB: 1,400; Total to COB: 1,612
 - ✓ Total 1st time COB Alumni Donors: 346
 - ✓ Total COB Living Alumni: 37,240; in Illinois: 24,211
 - ✓ Annual spending distribution to COB: \$457,391
- 2011 – 2015
 - ✓ 34 endowed scholarships; 20 restricted scholarships; 6 endowed faculty funds; 23 estate commitments; 3 restricted faculty development funds; 6 naming opportunities

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➤ Campaign

- ✓ Initial working goal of \$150 million
- ✓ Planning and organization stage 2015 – 2017
- ✓ Nucleus and Leadership Gift Phase 2016 – 2018
- ✓ Public Phase 2017 – 2020
- ✓ 50% of dollars will come from 2% of donors; 35% from 8% of donors; 15% from 90% of donors

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Campaign Priorities – Summer 2016

Expanding Student Opportunity (\$8 Million Goal)

Privately funded scholarships and other student-support resources can enable the College to attract stellar students, many of whom need financial support not only to attend Illinois State, but to maximize learning through opportunities beyond campus, such as international travel.

Attracting and Developing Top Faculty (\$7 Million Goal)

Providing an individualized educational experience is among the College's unwavering commitments, and requires top faculty with strengths in both teaching and research. Named, endowed professorships can help the College attract new faculty to campus, as well as reward and retain our faculty stars.

Paving a Professional Path (\$5 Million Goal)

Gift support for a new Office of Student Professionalism and Career Development will allow the College to coordinate internships and industry connections, mentoring opportunities, business professionalism resources, and career counseling. All will allow students to refine their professionalism, skill development, and career strategies to graduate with an even greater competitive advantage.

Sustaining Excellence (\$10 Million Goal)

Unrestricted resources enable the College to seize opportunities and respond to change without delay, which is crucial to remain relevant and on the cutting edge. Flexible funds advance the College's excellence and national reputation, enhancing the value and pride of an Illinois State business degree.

Reaching Beyond Campus Boundaries (\$6 Million Goal)

To better serve the needs of regional employers, advance knowledge, and expand our students' career paths, we seek philanthropic partners to help centers and institutes within the College of Business attain a heightened level of excellence. Two critical areas of opportunity include promoting financial literacy and harnessing data to more quickly spot trends, develop marketing strategies, and enhance business decisions.

Fueling Interdisciplinary Innovation (\$3 Million Goal)

"Innovation and collaboration spaces" within the College represent a new model for entrepreneurship, combining creative thinking with disruptive technologies to develop new ideas for expanding markets. These hands-on learning labs will unite experts from across disciplines to learn, create, and promote innovative business concepts. An emerging accelerator program helps move businesses forward.

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ILLINOIS STATE UNIVERSITY
Foundation

Fact Sheet for Fiscal Year 2016

July 1, 2015 to June 30, 2016

The ISU Foundation is a private, nonprofit organization dedicated to securing and stewarding private gifts that benefit Illinois State University.

GIFT PRODUCTION

By constituent group	
Alumni	\$8,547,326
Corporations	\$9,086,178
Foundations	\$391,007
Friends	\$3,667,638
Total	\$21,692,149

By purpose

Student support	\$6,080,292
Faculty support	\$616,845
Facility support	\$644,923
Program support	\$14,350,089
Total	\$21,692,149

By type

Outright gifts	\$7,763,243
Pledge commitments	\$7,888,225
Revocable deferred commitments	\$5,040,000
Irrevocable deferred commitments	\$120,000
Gifts in kind	\$880,681
Total	\$21,692,149

SCHOLARSHIPS AND FUNDS

Scholarship funds	704
Scholarships awarded in FY16	2,008
New scholarships established	25
Foundation funds	1,250
Foundation funds given to in FY16	725
New Foundation funds created in FY16	33

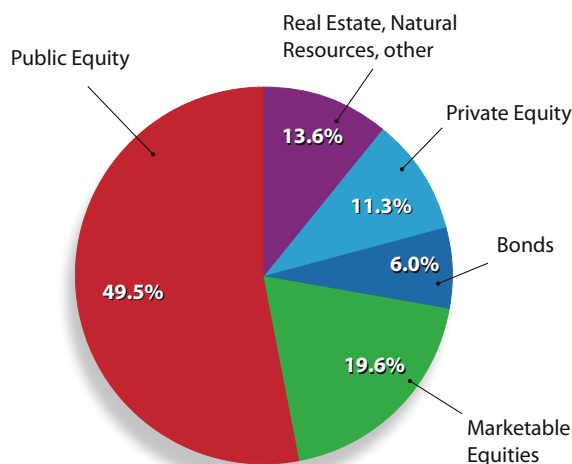
ALUMNI STATISTICS

Alumni donors	11,898
Alumni donors in Illinois	8,719
Alumni donors outside Illinois	3,179
First-time alumni donors	1,029
Living alumni	206,593
Alumni living in Illinois	129,037
Alumni living outside Illinois	77,556

ENDOWMENT

Annual spending distribution	\$3,766,133
Endowment return 1 year	-2.31%
Endowment return 5 years	4.54%
Total endowment amount	\$96,437,185

Endowment Asset Allocation



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ILLINOIS STATE UNIVERSITY
Foundation

1101 N. Main Street
Campus Box 8000
Normal, IL 61790-8000
(309) 438-2294

STATEMENT OF INTENT FOR AN ESTATE OR DEFERRED COMMITMENT

As evidence of my/our desire to provide a legacy of support to Illinois State University, I/we hereby inform the Illinois State University Foundation that I/we have made provisions for a gift to the University in my/our estate plans. I/we understand that this commitment can be modified by me/us at any time.

Name: _____ Birthdate: _____

Name: _____ Birthdate: _____

Gift Type

- Bequest through a will/trust:
 - Percentage of estate _____% or Specific amount \$ _____
 - Other (please specify): _____
- Charitable Trust (select one): ___ Unitrust ___ Annuity Trust ___ Revocable Trust ___ Lead Trust
- Charitable Gift Annuity: ___ Current ___ Deferred
- IRA or Retirement Plan: ___ Primary ___ Contingent Beneficiary
- Other (please describe): _____
- I/We have provided, or will provide, the ISU Foundation a copy of the portion of my/our will(s) or other instrument(s) that pertain to our commitment.

Estimated Gift Value

Understanding that the value is subject to change, as of today, I/we estimate the value of my/our deferred commitment to be approximately \$ _____. I/we understand that, by stating the amount, my/our estate is not legally bound by this statement, and I/we may choose to modify this bequest at any time, at my/our sole discretion.

Gift Designation

- The gift is unrestricted and may be used where the need is greatest at Illinois State University.
- Please designate the gift for this specific purpose:

Recognition

- I/we accept recognition in the University's Heritage Society as a result of this commitment and authorize ISU and the ISU Foundation to list my/our name(s) among those of other donors in recognition communications.
- I/we do not wish to receive any recognition by ISU or the ISU Foundation.

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

*Thank you for your support of Illinois State University.
The Illinois State University Foundation does not provide tax or legal advice.
Prospective donors should consult their legal and financial advisors.*

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Including
ILLINOIS STATE UNIVERSITY
in your will, trust, or IRA



**ILLINOIS STATE
UNIVERSITY**
Foundation

Campus Box 8000
Normal, IL 61790-8000

Foundation Tax identification number: 37-6025713

Each donor situation is unique, and therefore, the suggested language below provides an outline for how to include the Illinois State University Foundation in your estate plan. We encourage you to discuss your donative intent with an Illinois State University Development officer or the office of planned giving to ensure your wishes will be properly followed and recognized. This is especially important when you want to support Illinois State through more specificity than stated in the suggested language or when you have an interest in creating a named fund. In either situation a separate Administrative Agreement with the Foundation may be the most productive mechanism to capture your intentions and can be modified at any time.

Suggested bequest language for a will or trust

I hereby give, devise, and bequeath to the Illinois State University Foundation, a not-for-profit corporation located in Normal, Illinois,

Choose one of the following

- ____ percent of the residue of my estate,
- The sum of \$____.
- All of my interest in the following described property: ____.

Choose one of the following

- To be used for the area of greatest need at the time the gift is received.
- To be used for the benefit of (*name of college, department, program, or existing fund*).
- To be used for the purpose of (*scholarship, research, faculty, other purpose*) support.
- To be used in accordance with the terms of a signed Administrative Agreement on file at the Illinois State University Foundation at the time of my death.



Final language example

I hereby give, devise, and bequeath to the Illinois State University Foundation, a not-for-profit corporation located in Normal, Illinois, 20 percent of the residue of my estate, to be used for the purpose of scholarship support.