

From Gift to Impact: Partnering to Power UB's Future

Presented by University Advancement (UA)

Who We Are



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Agenda

- The Power of Philanthropy in Higher Education
- Managing the Ask: How Frontline Fundraising Happens
- Receiving the Gift: UBF's Role as Fiduciary Steward
- Partnership in Action: The Campus Role in Fund Utilization
- Stewardship: Closing the Loop and Reinviting the Donor
- Questions and Answers



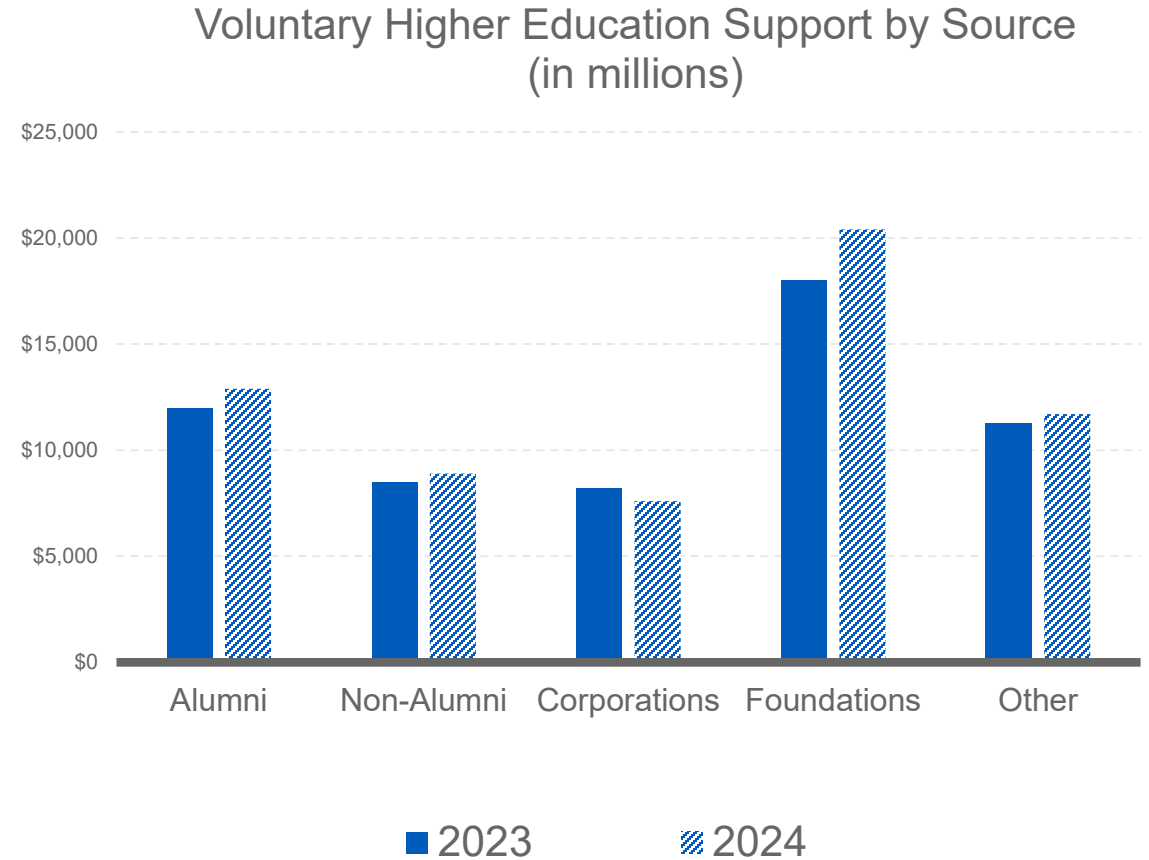
The Power of Philanthropy in Higher Education



Philanthropy in Higher Education

Higher education institutions received **over \$61 billion from philanthropic giving in 2024 alone.**

- Compared to the prior year, this **increased by 3 percent** when adjusted for inflation.
- As other sources of annual revenue decrease, this voluntary support—philanthropy—is **vital to the long-term sustainability** of U.S. colleges and universities.



Philanthropy at UB

Last year, the University received **over \$95 million** in committed dollars. Over the course of the Boldy Buffalo campaign, this has contributed towards:

- **976** new research funds
- **52** new endowed faculty positions
- Over **\$781M** has been raised for student success
- **100+** new or renovated state-of-the-art facilities or spaces
- **345** new scholarships, fellowships, and awards



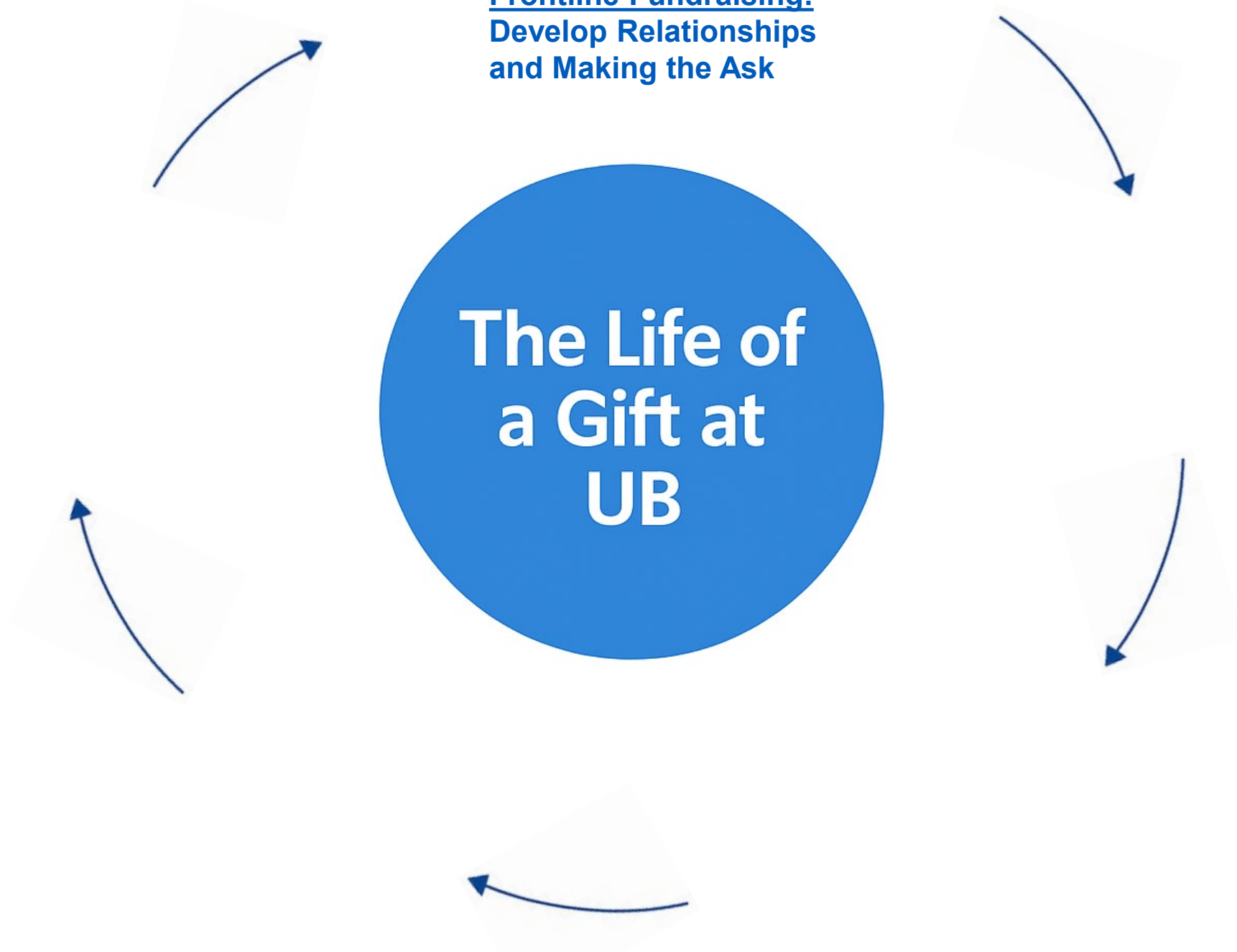


Managing the Ask: How Frontline Fundraising Happens



Frontline Fundraising:
Develop Relationships
and Making the Ask

The Life of a Gift at UB



Making the Ask: How Frontline Fundraising Happens

This initiative represents more than a simple solicitation—it is a **long-term, strategic partnership** with prospects and donors built on **collaboration** and **shared vision**.

University Advancement is comprised of **over 120 dedicated professionals** focused on cultivating meaningful relationships and driving philanthropic growth. This includes not only gift officers, but also experts in prospect research and analytics, donor relations, stewardship, and more.

We work in close partnership with deans, faculty, and university leadership to **align institutional priorities with donor interests**, ensuring that every engagement is purposeful and impactful.



Making the Ask: How Frontline Fundraising Happens

This journey begins with relationship building and thoughtful **cultivation**, evolving through personalized outreach and meaningful engagement.

Affinity and identity-based programs—such as alumni networks and student groups—play a vital role in **deepening connections** and **fostering a sense of belonging**, creating pathways for lifelong engagement.

Crafting the ask is a strategic and collaborative process that formalizes gift agreements—defining purpose, use, and recognition—while ensuring donor intent **aligns with university priorities**.



Receiving the Gift: UBF's Role as Fiduciary Steward



Frontline Fundraising:
Develop Relationships
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The Life of a Gift at UB

Fiduciary Stewardship:
Receive the Funds and hold
them to Compliance
Standards

Receiving the Gift: UBF's Role as Fiduciary Steward

The UB Foundation plays a critical role in ensuring that every philanthropic gift is protected, responsibly managed, and aligned with **both legal standards** and **donor expectations**.

Upon receiving a gift, UBF issues IRS-compliant receipts and ensures that all legal acceptance policies are met—providing **confidence and transparency** for donors and campus partners alike.

Each fund is established with a clearly defined purpose—either current-use or endowed—based on the signed gift agreement, ensuring **alignment** with donor intent from the outset.



Receiving the Gift: UBF's Role as Fiduciary Steward



Endowed assets are pooled and invested in accordance with NYPMIFA guidelines, **generating a sustainable 4–5% annual payout** that supports today's needs while preserving long-term principal.

UBF continuously monitors fund balances and expenditures to verify **compliance** with donor intent, proactively flagging any unspent or misused funds.

Regular financial **reports** are shared with campus units and Advancement, reinforcing stewardship and supporting meaningful donor engagement.

Four blue triangles of varying sizes are positioned in the top left corner of the slide.

Partnership in Action: The Campus Role in Fund Utilization





The Life of a Gift at UB

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and Making the Ask

Fiduciary Stewardship:
Receive the Funds and hold
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Strategic Utilization: Work
with Campus Partners to
Implement Gift via
Scholarship, Research,
Hiring, or Capital

Partnership in Action: The Campus Role in Fund Utilization



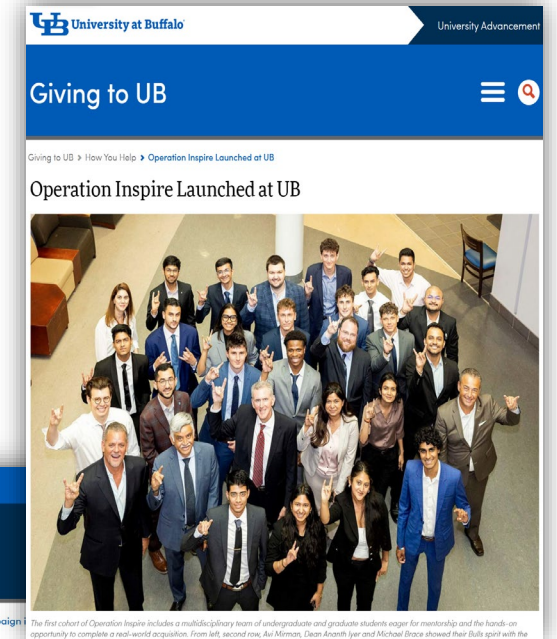
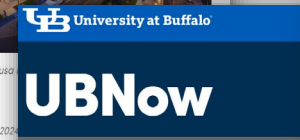
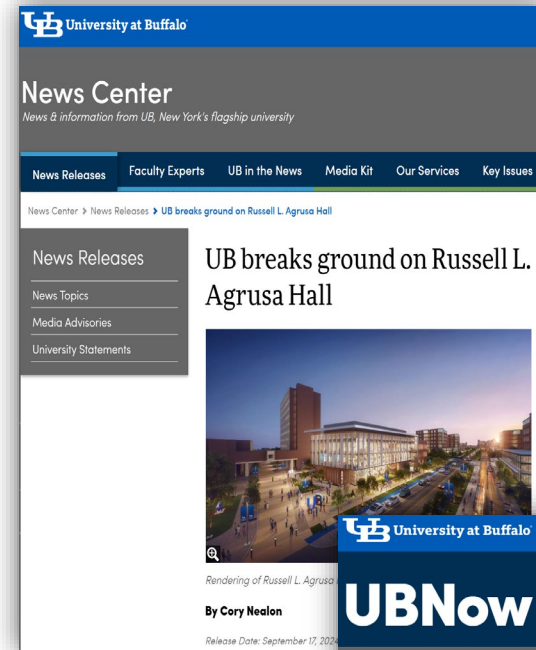
Once a gift is received and the fund is established, **campus units become the key players in fulfilling donor intent.** This may include awarding scholarships through AcademicWorks, funding research or academic programming, hiring faculty for endowed professorships, or launching capital projects such as buildings and labs.

Timely and appropriate spending is essential—not only to ensure impact but also to prevent stagnant balances, which **can erode donor confidence and stewardship momentum.**

Partnership in Action: The Campus Role in Fund Utilization

While University Advancement and UBF provide guidance and oversight, campus partners are the implementers who **bring donor-funded initiatives to life**. Their role is critical in maintaining trust and delivering on philanthropic commitments.

Accurate tracking, transparent reporting, and close coordination with UBF and Advancement are essential for **long-term success** and **continued donor engagement**.



Stewardship: Closing the Loop and Reinviting the Donor



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Strategic Utilization: Work
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Implement Gift via
Scholarship, Research,
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Impact Stewardship: Craft
the Relationship with Impact
Reports, Thank you Notes,
Recognition, and More

The Spark: Develop
Strategic Initiatives that
Align Donor Interests and
University Goals

Stewardship: Closing the Loop and Reinviting the Donor

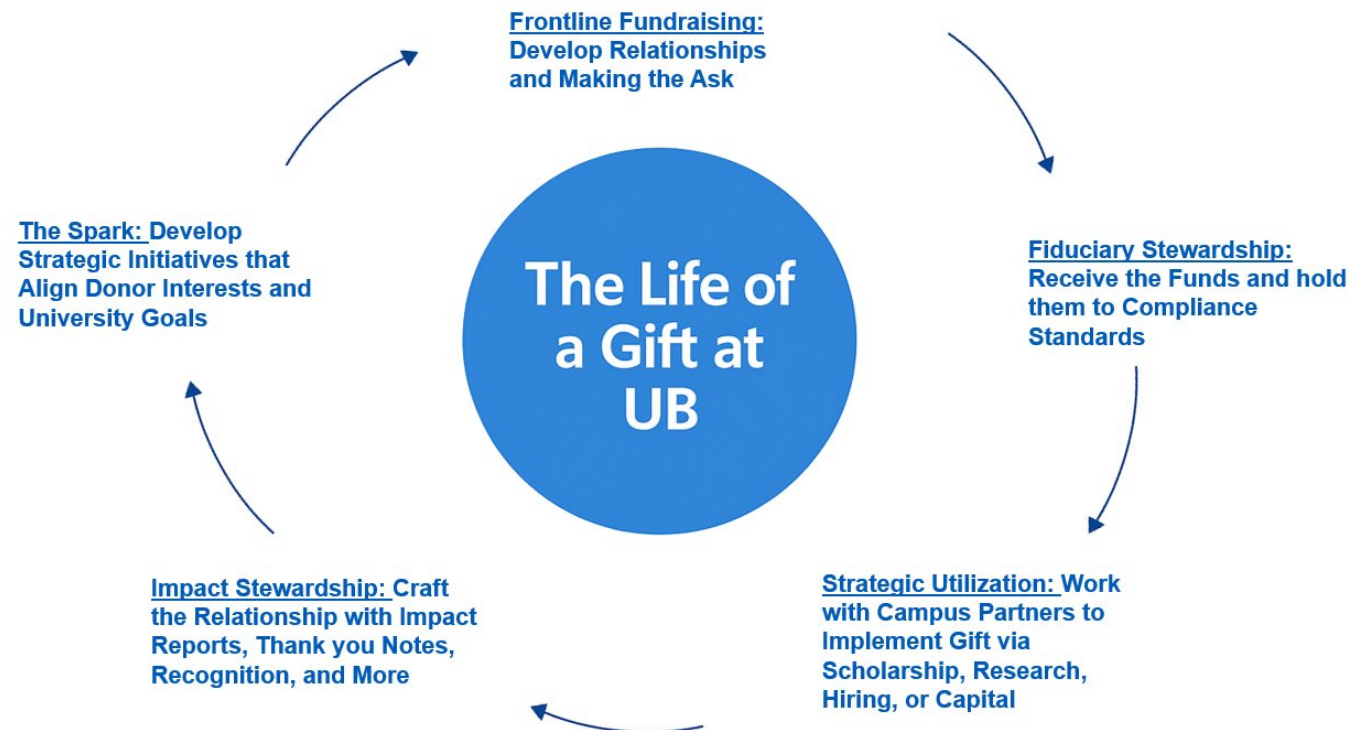


Stewardship efforts—from personalized thank-you notes to named space recognition—are rooted in the real impact of the gift. Regular updates and impact reports help donors see the value of their investment, reinforcing the **connection between their generosity and meaningful outcomes.**

Stewardship is more than appreciation; it's a vital part of donor cultivation, building trust and setting the stage for **future giving.**

Stewardship: Closing the Loop and Reinviting the Donor

Advancement tailors stewardship to donor preferences, with faculty and staff contributing authentic stories that bring the gift's impact to life. This collaborative approach ensures that stewardship is both personal and powerful. It creates a dynamic feedback **loop**:





Questions and Answers

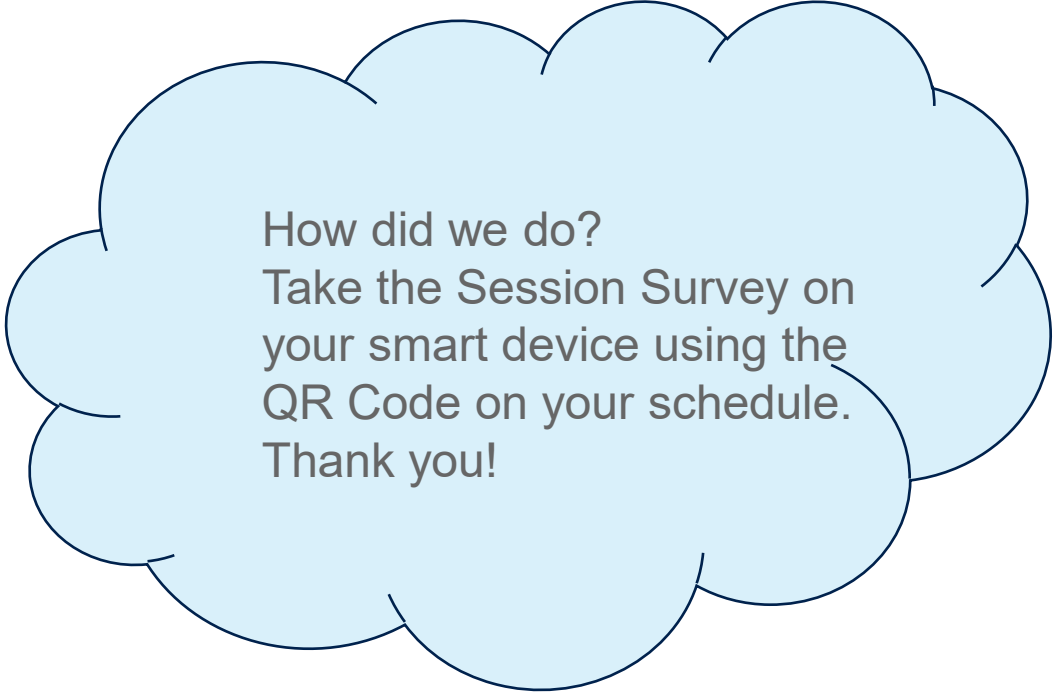


Closing Thoughts and Contacts

We hope this gives you meaningful insight into the life cycle of a gift at UB and the collaborative effort it takes to bring donor intent to life. ***Together, we all help create a culture of philanthropy and giving—where every gift makes a lasting impact.***

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