

Campus

Development

Reports

OFFICE OF THE CHANCELLOR



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May 14, 2007

TO: Development Committee

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cc: Art Zucker
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FROM: Jack Merselis, Chair Development Committee

SUBJECT: Materials for May 22 Conference Call

The Development Committee conference call to review and discuss the Campus Development reports, Trustee Giving Reports and approve Gift Resolutions will be held on **TUESDAY, MAY 22 @ Noon PDT / 3:00 pm EDT.**

The Dial-in Number is as follows:

REDACTED

The Agenda and materials for the conference call are enclosed.

NOTE TO: Campus President's

If you cannot participate on the conference call, please designate a Development Officer to participate in your place to discuss your campus Development Report.

**DEVELOPMENT COMMITTEE
AGENDA FOR CONFERENCE CALL
MAY 22, 2007**

1. Review Campus Development Reports
2. Review Trustee Giving Reports
3. Review / Approve Gift Resolutions
 - Endowment Gifts
 - Non-Endowed Gifts over \$50,000
 - Foundation Gifts
4. Discuss Solicitation of Former Trustees

**Antioch College
Development Narrative Report
January-April 2007**

Alumni Relations

- **Chapters**
 - Two new chapters: Seattle and San Francisco held their first meetings during this time frame,
 - In addition to these two chapters, other alumni chapters up and running are Boston, Chicago, Northern New Mexico, Yellow Springs/Miami Valley and Washington, DC.
 - A Yellow Springs/Miami Valley event was held in January. It was a night at the Dayton Philharmonic and 125 people forged through a major snow storm to attend.
 - A New York City event was held in March. It was a joint event with the Antioch Review and over 100 people attended this evening, which featured Sylvia Nasar '70, author of *A Beautiful Mind*. Our hope was to find leadership for a chapter in New York but this hasn't happened yet.
 - A planning meeting was held in Washington, DC with a small group of alumni. Plans were made for chapter events for the coming year.
 - Northern New Mexico is our smallest chapter but they are mighty! They are planning meetings on a monthly basis.
 - Boston is our strongest and longest standing chapter. They plan events every other month including panels, picnics and a day at the Cape.
- **Antioch College Alumni Association**
 - The ACAA met in early March and elected new officers for the coming year: Nancy Crow, President and Ina Frank, Vice President. While on campus, they had a presentation on the new curriculum, a visit at the CSKC center, a community meeting with students, staff and faculty and they were addressed by President Lawry.
 - The ACAA has an active development group which is led by Ina Frank. To date, the alumni board members have contributed \$47,312 and the solicitation is ongoing.
- **Affinity Boards**
 - **Science Advancement Board:** First meeting was held on March 23, 2007. Fifteen distinguished science graduates (see attachment) met to consider how they can advance the sciences at Antioch. They decided that their focus would be engaging science graduates and friends in fundraising for the sciences and in providing expertise and backup for the professors in the sciences.
 - **Alumni of Color Board:** They are meeting to work on an alumni association award named for a person of color: The Walter Anderson Award and developing structure and policies for their group.
- **Alumni Reunion**
 - Reunion is scheduled for June 22-24th and Work Project is scheduled for June 18-21st. Registration information was mailed in March to all alumni and went online at the same time.

- Attendance was 126 last year and our goal is to have 200 people attending this year.
- **Alumni Class Representatives**
 - We were able to recruit 10 class representatives this year for the reunion classes and have sent letters to their classmates.
 - Through this program, we have raised \$21,570 plus a pledge of \$50,000.
 - Through the persistence of the 1967 Class Rep, 50 people have been identified that will return for their 40th Reunion.

Annual Fund/Phonathon

- Including gifts and pledges, phonathon has raised \$232,255 this year (vs. \$122,618 last year). Assuming a 93% pledge fulfillment rate, the total amount raised for this year will be \$215,997.
- Our graduate participation rate is 29.9% vs. last year's participation rate of 26.5%.
- Phonathon was able to secure over 200 new donors (people who have never given) to Antioch College this year and 157 donors who haven't given since FY01 or before.

Major Gifts

- Major gift officers made 77 face to face visits during January-April.
- They made over 300 additional contacts either through phone calls, emails or letters during the same time period.
- Major gift officers raised \$80,081 in cash, \$5,000 in signed pledges, and added \$1,170,000 to our planned giving inventory during the months January-April.

Antioch Alumni Relations Office Forms Alumni Board for Science Advancement

The Antioch College Science Advancement Board had its first meeting on March 23, 2007. The board comprises 14 distinguished Antioch Alumni working in science and math related fields. In their first meeting the board set out their broad mission to support and strengthen science at Antioch and identified preliminary steps toward achieving that goal. The board members have elected to be a standing committee serving 5 year terms. While the board is in its preliminary planning stages they have outlined some key areas for analyzing and supporting the Science programs at Antioch. They are dedicated to helping focus strength in areas where Antioch College excels, namely the interdisciplinary fields of Environmental and Biomedical Sciences.

1. Pavel Curtis, PhD '81 Software Architect, Microsoft Corporation
2. John Dawson, PhD '58 Professor of Physics, Emeritus, University of New Hampshire
3. Masha Etkin, MD, PhD '63 Physician, Clinical Instructor OB/GYN at Harvard University Medical School
4. Ernest Fine '65 Microcomputer consultant
5. Alanah Fitch, PhD '75 Professor of Chemistry, Loyola University Chicago
6. Bernard Guyer, MD '65 Zanvyl Kreiger Professor of Children's Health and Director, School-wide DrPH Program, Johns Hopkins Bloomberg School of Public Health
7. Andrea Gwosdow, PhD '75 President, Gwosdow Associates, Science Consultants Assistant clinical professor, Harvard Medical School.
8. James D. Irish PhD '67 Research Professor, Ocean Engineering Program, Chase Ocean Engineering Laboratory, University of New Hampshire
9. Everett I. Mendelsohn PhD '53 Professor of the History of Science, Harvard University.
10. Irwin Pomerantz, PhD Retired Chemist, USEPA
11. David Scott, PhD Professor, Departments of Surgery and of Microbiology & Immunology, Univ. of Maryland School of Medicine
12. Gary Strichartz, PhD '65 Professor of Anaesthesia (Pharmacology), Harvard Medical School*
13. Hardy Trolander '47 Retired Founder & Chairman of Yellow Springs Instruments Company
14. Judith Voet, PhD '63 Professor of Chemistry and Biochemistry, Swarthmore College

*Dr Gary Strichartz is the Chairperson for the Science Advancement Board .

ANTIOCH COLLEGE
THREE YEAR COMPARISON
1 July 2006 to 30 April 2007

	Cash Gifts/ Pledge Payments	Pledged But Not Yet Paid	Total	Goal	# Gifts
Fiscal Year 2006-2007					
Restricted Gifts	\$80,670	\$280	\$80,950		783
Endowment Funds	\$42,574	\$600	\$43,174		34
Annual Fund	\$818,655	\$100,630	\$919,285	\$1,200,000	3165
Capital Campaign 2006	\$130,453	\$59,351	\$189,804	\$800,000	63
Capital Campaign 2001	\$144,081	\$28,968	\$173,049		45
Glen Helen	\$284,788	\$3,979	\$288,767		383
Grants	\$9,670	\$0	\$9,670		1
In-Kind Gifts	\$4,376	\$0	\$4,376		7
Planned Gifts					
Realized	\$62,157		\$62,157		10
Unrealized**		\$5,605,050	\$5,605,050		
TOTAL	\$1,577,423	\$5,798,858	\$7,376,281		4491
Fiscal Year 2005-2006					
Restricted Gifts	\$181,589	\$200	\$181,789		54
Endowment Funds	\$1,005,388	\$6,350	\$1,011,738		233
Annual Fund	\$776,234	\$181,546	\$957,780	\$1,150,000	3471
Capital Campaign 2001	\$767,409	\$89,573	\$856,982		129
Glen Helen	\$166,173	\$45,949	\$212,122		176
Grants		\$0	\$0		
In-Kind Gifts	\$22,599	\$0	\$22,599		33
Planned Gifts					
Realized	\$165,602		\$165,602		2
Unrealized			\$0		
TOTAL	\$3,084,994	\$323,618	\$3,408,612		4098
Fiscal Year 2004-2005					
Restricted Gifts	\$207,686	\$25,975	\$233,661		162
Endowment Funds	\$123,359	\$400,850	\$524,209		65
Annual Fund*	\$768,298	\$210,034	\$978,332	\$1,600,000	2818
Capital Campaign 2001	\$4,686,782	\$2,375,436	\$7,062,218		108
Glen Helen	\$88,111	\$5,000	\$93,111		223
Grants		\$0	\$0		
In-Kind Gifts	\$38,793	\$0	\$38,793		23
Planned Gifts*					
Realized	\$0	\$0	\$0		
Unrealized	\$0	\$0	\$0		
TOTAL	\$5,913,029	\$3,017,295	\$8,930,324		3399

Percentage of Alumni Giving: **29.9%**

*Planned Giving Unrestricted included in Annual Fund

** Total Planned Giving Inventory

ANTIOCH UNIVERSITY SEATTLE
FUNDRAISING AND ALUMNI RELATIONS REPORT
January 1, 2007 – April 30, 2007

Successes

On March 29, AUS held its 4th Annual Horace Mann Awards. The event broke all previous records, raising \$36,168 for the scholarship endowment. The event was underwritten by 24 sponsors who contributed \$21,000 in sponsorships and \$1,000 in in-kind services. The Diamond Sponsor (\$5,000) was BECU. Platinum Sponsors (\$2,500) were Embassy Development and Essential Consulting. Gold Sponsors (\$1,000) were Group Health Cooperative, Miller Nash, the Suquamish Tribe, the Tulalip Tribe and US Bank – Student Banking Division. Silver Sponsors (\$500) were the Academy of Coach Training, Buck & Gordon, Clise Properties, Global Business Development Solutions, the Heritage Institute, IKEA Seattle, Keeney's Office Plus, National Education, Ron Wright & Associates and Cassandra Espinoza-Rowe. Bronze Sponsors (\$250) were the Center for the Promotion of Learning Abilities; Martin, Browne, Hull & Harper, Northwest Capital Partners, and Premera Blue Cross. In-kind Sponsors were the Follett Corporation and Printex Press. Ron Reagan served as the keynote speaker and alumna Mauri Moore, the former West Coast producer for NBC Nightly News, served as the emcee. Award recipients were Jack Hamann, author of *On American Soil*; Susan Warner, director of programs for the Museum of Glass; and Wendy Rosen, core faculty and director of the First Peoples' Program. It was the most successful event to date with 246 guests attending.

AUS received a \$15,000 grant from the Seattle Foundation and a \$15,000 from the Sharon and Mark Bloome Fund of the Tides Foundation to launch a Legacy Leadership Institute through our Center for Continuing Education. Proposals are also pending to the Weyerhaeuser and Medina Foundations for this institute.

AUS has its first alumni chapter. Faculty and some 33 alumni from the Center for Creative Change attended the April 28th event, in which they renewed relationships, shared similar passions, created a book club and vowed to have more such gatherings throughout the year.

Alumnus Chris Fontana, M.A. Whole Systems Design '98, was selected as the recipient of the 2007 Distinguished Alumni Award, which he will receive at Commencement on Saturday, June 9. He is one of the founders of the Seattle-based non-profit Global Visionaries, which aims to get high school students out of the classroom and into the world to become global citizens. Fontana has been the executive director since the organization's founding in 1997.

More than 25 alumni from different programs met to brainstorm what new signature events could be offered through the Office of Continuing Education. Camp Antioch, a summer camp weekend for grownups, will be held July 28-29 at Camp Burton on Vashon Island. Organized activities may include participatory dance, games, theater or comedy improvisation, creative arts, storytelling, hikes on the beach, campfires and "chewy" conversations – all designed to renew friendships and make new friends.

Opportunities and Challenges

Raising unrestricted funds continues to be a challenge. The Fall Phonathon raised only \$12,058 with a 5.44% response rate. A fiscal year-end direct mail appeal is being sent to 830 lapsed donors to make up some of that difference.

A mailing including a Sharpe brochure was sent to alumni aged 70 and older to inform them about giving opportunities through their IRAs.

Creating opportunities to have alumni gather with new President Dr. Cassandra Manuelito-Kerkvliet and finding ways to both contact and gather together early alumni (1976-1985) are high priorities in the coming months.

Board of Visitors

AUS recently added seven new board members: Mary Chin Barrett, director of business development for Banta Marketing Solutions; Janet Berglund, a consultant for Essential Consulting; Willard Bill, director of Native American Education for Seattle Schools; Cassandra Espinoza-Rowe, Hispanic marketing advisor for Salem Communications Corp.; Naomi Ishisaka, editor of ColorsNW Magazine, John Pehrson, chair of the Belltown Land Use Council; and Heyward Watson, CEO of Impact Capital/LISC. Board giving for the fiscal year is 88%, with board members contributing or responsible for \$22,600 in gifts.

ANTIOCH UNIVERSITY SEATTLE

THREE YEAR COMPARISON

July 1 – April 30

	Cash Gifts/ Pledge Payments	Pledged But Not Yet Paid	Total	Goal	# Gifts
Fiscal Year 2006-2007					
Restricted Gifts	\$40,387.81	\$7,700.44	\$48,088.25	\$47,000.00	236
Endowment Funds	\$37,447.68	\$437.00	\$37,884.68	\$30,000.00	187
Annual Fund	\$9,947.28	\$1,476.26	\$11,423.54	\$30,000.00	238
Grants	\$2,514,093.00	0	\$2,514,093.00	\$2,500,000.00	8
In-Kind Gifts	\$6,222.06	0	\$6,222.06	\$18,000.00	10
Planned Gifts					
Realized					
Unrealized					
TOTAL	\$2,608,097.83	\$9,613.70	\$2,617,711.53	\$2,625,000.00	679
Fiscal Year 2005-2006					
Restricted Gifts	\$60,453.77	\$2,920.03	\$63,373.80	\$53,000.00	234
Endowment Funds	\$21,890.84	\$396.75	\$22,287.59	\$30,000.00	186
Annual Fund	\$15,223.68	\$2,284.19	\$17,507.87	\$30,000.00	325
Grants	\$2,402,354.00	0	\$2,402,354.00	\$2,288,500.00	9
In-Kind Gifts	\$15,150.33	0	\$15,150.33	\$27,000.00	8
Planned Gifts					
Realized					
Unrealized	\$175,000.00				
TOTAL	\$2,690,072.62	\$5,600.97	\$2,520,673.59	\$2,428,500.00	762
Fiscal Year 2004-2005					
Restricted Gifts	\$18,335.04	\$1,119.35	\$19,454.39	\$35,000.00	152
Endowment Funds	\$38,750.07	\$218.37	\$38,968.44	\$25,000.00	163
Annual Fund	\$13,116.68	\$494.22	\$13,725.90	\$20,000.00	162
Grants	\$1,638,731.00	0	\$1,638,731.00	\$1,532,000.00	5
In-Kind Gifts	\$44,825.00	0	\$44,825.00	\$20,000.00	5
Planned Gifts					
Realized					
Unrealized					
TOTAL	\$1,753,757.79	\$1,831.94	\$1,755,589.73	\$1,632,000.00	487

Current Percentage of Alumni Giving: 5% (259 of 5,090 alumni made gifts)

Antioch University Board of Trustees

Antioch University Southern California

Summary of Development Activities: January – April 2007

Regional Projects

- Although Antioch University Southern California will split into two separate campuses, AUSB and AULA Development staff members continue to meet on a weekly basis to coordinate and develop the Raiser's Edge database, prepare Horace Mann invitation lists, and coordinate gift tracking, acknowledgment, reporting, accounting and donor communications.
- The Santa Barbara Horace Mann Awards are being supported regionally. As of April 30, \$36,200 in gifts and pledges had been raised, with more gifts expected.
- Using Raiser's Edge NetMail feature, personalized emails were sent to all AUSB alumni with email addresses, inviting them to the Horace Mann Awards Luncheon.
- The 2007 Holiday Appeal, sent to all AULA and AUSB alumni, donors, faculty, staff and other individuals of importance last quarter, continued to bring in revenue. To date, donations total \$3,595.

Santa Barbara

Fundraising

- Approximately 8 calls per week were completed with individuals of importance including Board of Visitors members, major potential benefactors, government leaders, and other community leaders.
- Site visits were hosted for educational representatives from Taiwan, Malaysia, Mexico and Sweden to discuss international student recruitment and development.
- Horace Mann sponsorship gifts in support of the May 17, 2007 event are being cultivated and solicited through individual meetings with potential donors and the submission of sponsorship proposals. Current gifts include a \$15,000 pledge for Horace Mann Scholarship support, a \$5,000 Entertainment Sponsor, six \$1,500 Friend Sponsors, and sponsorships of the invitation and program, as well as other event contributions.
- Development staff contacted major Santa Barbara media contacts to request coverage of 2007 AUSB Horace Mann Awards. Current press coverage includes a listing of the event in the Santa Barbara Independent Calendar of Fundraisers, an ad (an in-kind gift) in the Pacific Coast Business Times, and event information and a posting of the invitation in the Scene & Heard in Santa Barbara Newsletter (an e-newsletter). The social editor of the Santa Barbara News Press will attend and report on the event and Santa Barbara Arts TV plans to attend. Additional AUSB media coverage included the participation of the AUSB President in the 11th of April Commerce Weekly Business Radio Magazine on KZSB 1290 AM and an article on the front page of the 4th of March Santa Barbara News Press presenting the new changes envisioned by Dr. Michael Mulnix for the AUSB campus.

- With the AUSB President, Development staff arranged multiple meetings with the Horace Mann event honorees and their presenters, all prominent members of the Santa Barbara community, to further cultivate and engage them in the mission of AUSB.
- The following grant requests and/or letters of inquiry are in progress:
 1. Letter of inquiry to The California Wellness Foundation to fund a course of study to launch a comprehensive training program for bilingual mental health professionals in the Santa Barbara region.
 2. \$25,000 to The Towbes Group, Inc. for program development support and general scholarship assistance.
 3. Grant request submitted to the Department of Education Title 3, Part A, Discretionary/Competitive Grant to expand capacity to serve-low income students by providing funding to improve and strengthen the academic quality, institutional management, and fiscal stability of eligible institutions.
 4. Letter of inquiry to provide music education to Santa Barbara teachers and students in partnership with Guitars™ in the Classroom.
 5. \$2,000 to American Psychological Services.
- Development staff and work study student researched foundations and Development employee attended two grant maker seminars.
- AUSB website was overhauled and a new emphasis on programming for international students was introduced.
- Development staff participated in the WASC Accreditation Team campus site visit and preparatory meetings.
- Development staff is participating in the discussion and development of the AUSB Strategic Plan and prepared fundraising questions for the AUSB Survey for Strategic Planning Purposes.
- Development staff supervised and helped a graduate student format the AUSB Enrollment and Publicity Flyer Project. Graduate student posted flyers in local restaurants and institutions to obtain additional publicity for AUSB and its programs and mission.

Events

- A Board of Visitors meeting was held on February 26, 2007.
- A system-wide Development retreat was held on the AUSB campus on the 3rd and 4th of February, 2007.
- AUSB Board of Visitors Members attended a reception in Santa Barbara with the Antioch Board of Trustees on February 1, 2007.
- Development staff is engaged in all elements of planning, preparation, publicity, and fundraising for the 17th of May AUSB Horace Mann Awards Luncheon.
- AUSB President, Academic Dean, and Director of University Advancement met with the Executive Director of The Association for Global New Thought to discuss a possible partnership. AUSB President and MAOM Chair and Program Director participated in the

Gandhi King Peace Train and Conference from April 18 to 21 sponsored by Global New Thought to seek additional partnerships and publicity for AUSB.

- Various individual meetings and luncheons were held on the AUSB campus with individuals of importance.
- Development staff will host a table at the 22nd of June AUSB Commencement with Antioch materials to network with, and further engage, AUSB graduates and their guests in AUSB and its mission and activities.
- An AUSB Presidential Inauguration is being considered for fall, 2007 and initial discussion of the event is in progress.

Los Angeles

Fundraising

- Fundraising continues for the M.A. in Psychology program's new LGBT specialization:
 1. REDACTED has made possible a generous two-year grant from the Johnson Family Foundation for \$50,000. \$25,000 was awarded this year to establish a scholarship and support fundraising activities; another \$25,000 was pledged for next year: \$20,000 in matching gifts for any funds raised in 2007, and \$5,000 for further fundraising efforts in 2008.
 2. Other fundraising activities, such as events and direct mailings, have yielded over \$15,620 in gifts and pledges to date.
 3. Several grant proposals seeking program and scholarship support were prepared and sent to foundations in January. Funding decisions are pending.
- AULA received a \$20,000 pledge intended to match all alumni donations to the Alumni Scholarship Fund and Board of Visitors donations to the President's Scholarship Fund. This exciting news was announced at an alumni event that resulted in \$2,425 in donations. When matched, these funds generate a total of nearly \$5,000 for student scholarships.
- To take advantage of the REDACTED gift matching opportunities, a direct mail appeal was recently sent to all alumni, seeking gifts to the Alumni Scholarship Fund and the LGBT specialization. Contributions are anticipated to arrive in mid-May.
- New Board of Visitors members with philanthropic capability and/or important community contacts were added to the group:
 - Leslie Schwartz, President of PEN Center USA
 - Rick Hesel, Principal of Art & Science Group Marketing Consultants
 - Reuben Harris, Board of Trustees Member
- Over \$1,700 was raised via a targeted direct mail appeal to alumni and donors in order to establish a scholarship in honor of long-time faculty member Stephanie Solomon. Further gifts are anticipated.
- The M.F.A. in Creative Writing program was a \$2,500 sponsor at the AWP conference in Atlanta. They were invited to present two major programs at the conference, increasing the visibility of the program and Antioch.

- The Bridge program is in the process of sending out a direct mail appeal to all B.A. alumni to support the program, which offers free humanities-based education to people who could not otherwise afford it. These efforts are meant to complement the \$47,200 already received from major donor REDACTED
- The annual staff and faculty fundraiser for the Leiter Scholarship Fund brought in \$150.
- Grant applications requesting \$25,000 to fund the School Based Counseling Program have been sent out to the Doheny Foundation, Milken Family Foundation, the Ralph M. Parson's Foundation, the Mark Taper Foundation, and the Times Mirror Foundation.
- The AULA website was overhauled and launched as of May 1st. For the first time, an alumni relations and development page has been added. Like the site as a whole, it was designed for clarity, efficiency, and a more modern look.

Events

- The quarterly Board of Visitors meeting was held on April 11th to discuss the new direction of Antioch Los Angeles under the direction of President Neal King. The Board of Visitors agreed that giving should be a requirement of Board membership.
- An alumni event was held on March 25, 2007, at a restaurant owned by Mr. John LaCorte. The event was well-attended, a great success, and served as the kickoff for AULA's Alumni Scholarship Appeal. (*See Fundraising.*)
- Antioch University joined forces with Tsehai Publishers on February 25th, to celebrate the release of an anthology of poetry entitled *Voices from Leimert Park: An Anthology*, helping to raise Antioch's visibility in the African-American community.
- Planning is underway for a May event honoring Professor Emerita Stephanie Solomon's dedication and service to the B.A. Program. A scholarship was started in her name. (*See Fundraising.*)
- Plans for the first-ever symposium for B.A. students has begun. They will be presenting their work to alumni, family, friends and peers at this all day event scheduled for May 19, 2007. More than twenty presentations are anticipated.
- The Second Annual Alumni Residency for MFA in Creative Writing graduates was held April 20 – 22. This much anticipated weekend of inspiration and encouragement attracted 25 alumni.
- The Master of Arts in Education program held an alumni social on January 21, 2007. About a quarter of MAE alumni attended.

ANTIOCH UNIVERSITY SOUTHERN CALIFORNIA

THREE YEAR COMPARISON

July 1 – April 30

	Cash Gifts/ Pledge Payments	Pledged But Not Yet Paid	Total	Goal*	# of Gifts	# of Donors
Fiscal Year 2006-07						
Restricted Gifts	\$41,223	\$24,200	\$65,423	N/A	113	106
Endowment Funds	0	0	0	N/A	0	0
Annual Fund	\$8,845	0	\$8,845	N/A	47	41
Grants	\$302,900	\$45,000	\$347,900	N/A	12	7
In-Kind Gifts	\$2,250	0	\$2,250	N/A	2	2
Planned Gifts						
Realized	0	0	0	N/A	1	1
Unrealized	\$250,000	0	\$250,000	N/A	0	0
TOTAL	\$605,218	\$69,200	\$674,418	N/A	175	157
Fiscal Year 2005-06						
Restricted Gifts	\$58,011	N/A	\$58,011	N/A	225	209
Endowment Funds	0	N/A	0	N/A	0	0
Annual Fund	\$74,014	N/A	\$74,014	N/A	141	135
Grants	\$190,000	N/A	\$190,000	N/A	4	1
In-Kind Gifts	\$600	N/A	\$600	N/A	1	1
Planned Gifts						
Realized	0	N/A	0	N/A	0	0
Unrealized	0	N/A	0	N/A	0	0
TOTAL	\$322,625	0	\$322,625	N/A	371	346
Fiscal Year 2004-05*						
Restricted Gifts	\$18,204	N/A	\$18,204	N/A	153	145
Endowment Funds	0	N/A	0	N/A	0	0
Annual Fund	\$65,075	N/A	\$65,075	N/A	85	80
Grants	\$266,108	N/A	\$266,108	N/A	6	3
In-Kind Gifts	0	N/A	0	N/A	0	0
Planned Gifts						
Realized	0	N/A	0	N/A	0	0
Unrealized	0	N/A	0	N/A	0	0
TOTAL	\$349,387	0	\$349,387	N/A	244	228

FY 2006 percentage of Alumni Giving: 0.5%

*AUSC has not yet established annual goals.

Antioch University McGregor

Development/Alumni Relations Narrative Report

January 2007—April 2007

Capital Campaign

The Antioch University McGregor capital campaign will continue throughout 2007 in pursuit of the \$3 million goal. Campaign co-chair, Fred Bartenstein remains in his leadership role and is a key part of the campaign success. After much involvement and significant time dedicated to the campaign, Richard Lapedes, Campaign co-chair, has transitioned out of his leadership role to pursue personal and family obligations. Pam Bruns, a professional fundraiser with Contribution Strategies, joined the campaign as campaign counsel and is assisting President Danley and her staff with a focused plan for pledge and gift generation. Qbase, a local data analysis firm, is also involved in the campaign with a focus on providing data scrubs and demographic analysis on our alumni database to identify prospects and correct mailing addresses. We are in various "asks" with: Standard Register, Reynolds and Reynolds, Premier Health Partners, SBC, the Levin Foundation and Physicians' Charitable Foundation.

Alumni Relations

We recently hosted our second Career Smarts event on April 22 in partnership with the School of Management. Our first event in April 2006 was so well received that it made sense to host a second event for our alum and current students. This event is designed to help individuals perform a career tune up; create a strategic plan for their career; build a network of people and develop a healthy support system.

Board of Visitors

Several McGregor Board of Visitor members are also members of the Capital Campaign Cabinet. Their support and leadership in both roles remains strong. Board of Visitor members have donated their time guiding efforts around the alumni campaign and have volunteered to participate in alumni fundraising efforts. Other members have contributed significant time to advising President Danley over the past few months on programming initiatives at McGregor. The Board of Visitors have generously contributed over \$4,000 toward the capital campaign.

ANTIOCH UNIVERSITY MCGREGOR

THREE YEAR COMPARISON

July 1 – April 30

(submitted for the June 2007 Board meeting)

	Cash Gifts/ Pledge Payments	Pledged But Not Yet Paid	Total	Goal	# Donors
Fiscal Year 2006-2007					
Restricted Gifts	\$373,960.78	\$110,000	\$483,960.78	\$3,000,000	100
Endowment Funds	0	0	0	0	0
Annual Fund	460	0	460	7,000	4
Grants	175,000	0	175,000	175,000	2
In-Kind Gifts	50,000	0	50,000	0	1
Planned Gifts	0	0	0	0	0
Realized	0	0	0	0	0
Unrealized	0	0	0	0	0
TOTAL	\$599,420.78	\$110,000	\$709,420.78	\$3,182,000	107
Fiscal Year 2005-2006					
Restricted Gifts	\$449,363.35	\$696,924.15	\$1,146,287.50	\$3,000,000	187
Endowment Funds	0	0	0	0	0
Annual Fund	6,565.00	100	6,665.00	10,000	10
Grants	185,000	0	185,000	185,000	1
In-Kind Gifts	397,675	0	397,675	0	3
Planned Gifts	0	0	0	0	0
Realized	0	0	0	0	0
Unrealized	0	0	0	0	0
TOTAL	\$640,928.35	\$697,024.15	\$1,337,952.50	\$3,195,000	200
Fiscal Year 2004-2005					
Restricted Gifts	\$560,434.02	\$270,000	\$830,434.02	\$3,000,000	36
Endowment Funds	0	0	0	0	0
Annual Fund	1,867.50	0	1867.50	12,000	15
Grants	185,000	0	185,000	185,000	1
In-Kind Gifts	152,000	0	152,000	0	1
Planned Gifts	0	0	0	0	0
Realized	0	0	0	0	0
Unrealized	0	0	0	0	0
TOTAL	\$562,301.52	\$270,000	\$832,301.52	\$3,197,000	53

Percentage of Alumni Giving: 5%

Antioch University New England
Office of Alumni Relations and Development
Narrative Report
January 1 – April 30, 2007

VP for institutional Advancement

On board since March 3, 2007, Serafina Williams is overseeing Communications, Marketing, Public Relations, Web Services, Development, and Alumni Relations as ANE's new Vice President for Institutional Advancement. She is working toward establishing a solid team format and process across the various departments of institutional advancement. Sera has stepped in to the position of co-chair for the priority five phase of the strategic plan--writing the business plan-- and will assist in the writing of the overall strategic plan expected to be completed mid summer.

Annual Fund

To date we have 380 new donors bringing in \$3,837. As expected, the lack of a Director has had negative consequences in an overall numbers. Several factors have created the difference. A \$5000 gift received for several years was not repeated this year and has not yet been recovered from new sources. Trustee giving is coming in later than it did last year. The increased work of the presidential inauguration event put pledge collection on hold, and we still struggle with participation consistency. The Annual Fund cash figures by appeal are as follows:

Fall appeal	\$18,787
Online form	1,675
Phonathon	17,750
Phonathon missed you note	4,165
Spring appeal	2,637
Employees	1,846
Trustees	750
Board of Visitors	1,200

Efforts will continue in hopes of making up some of the ground lost. Based on past years, we expect to realize about half of the \$5700 that is outstanding in phonathon pledges. We will send one more appeal to those who agreed to an unspecified amount during the phonathon. Plans are underway to have the VPIA follow up with the more than fifty \$100+ donors who gave last year but have not given yet this year. She will try to obtain a three year Annual Fund commitment to start adding more consistency to our numbers. She will also be following up with our Board of Visitors to obtain their 100% participation.

Next fall's plans are already in the making. We will create an Annual Fund Steering Committee to help facilitate better Annual Fund participation and more funding. This volunteer structure should prove to be more successful in personal and peer on peer solicitations. Also in the planning stages is an Institutional Advancement Committee that would include internal and key external members. The overall purpose of this group will be to help extend ANE's reach and network, and assist with key solicitations.

Planned Giving

Another issue of our quarterly newsletter "ANE Legacy" has been sent to our planned giving prospect base. We have one more issue planned, and then the planned giving initiative will be placed on hold until more staff can be put in place and potential donors can be identified. Requests for more information continue to trickle in from this effort. The VPIA will be following up on the requests we've received since we began two years ago with the newsletter to encourage more Glen Maples participants.

REDACTED

sought out Antioch New England during their estate planning. They knew us only through a few visits to campus to attend talks highlighting environmental topics. They have finalized a revocable trust which would transfer their house and contents to ANE at their death. It also provides \$100,000 endowment for maintenance and ownership expenses.

We were notified of long time friend REDACTED passing. One of the first members of the Glen Maples Society and a former member of the original ANE Board of Visitors, he will leave a scholarship legacy at ANE near \$30,000. The details around the scholarship will be decided when the funds are realized.

Scholarships/Partnerships

ANE General Scholarship: to date, \$3,910 has come in from our partnerships with Bank of America/MBNA credit card and Liberty Mutual Insurance.

Cap and Gown Book Scholarship: We've completed another year for the cap and gown reuse program. Over 100 students chose to reuse previously donated commencement attire for a \$29 donation that funds this scholarship. \$2,525 was raised this year. These funds will be used to support students who are single parents by helping with awards of \$400 toward the cost of their course books.

Board of Visitors

The last meeting of our board of visitors was February 16th, and the ANE strategic planning process was a major topic for discussion. A member of the BOV agreed to join the strategic plan Priority 5 work group that will draft the business plan. The next meeting is June 15th. The Board's focus continues to be providing advice and guidance to the president and his cabinet on the direction the institution is moving as we begin to finalize and implement the strategic plan.

Alumni Gatherings

Due to the work around the inauguration, alumni events were put on hold for spring with two exceptions:

Our small alumni Nature Writing workshop which we've done annually on Cape Cod was another success. Ten alumni from the Departments of Education and Environmental Studies soaked in nature and enjoyed the new ANE connections they made with each other. Fred Taylor, our adjunct professor said the written pieces produced this time around were some of the best he's seen from this workshop.

Rowland Russell, alumnus and adjunct faculty pulled together an art exhibit entitled "Where is Nature?" The exhibit was in concert with the theme of the next volume of Antioch New England's *Whole Terrain: Journal of Reflective Environmental Practice* (published since 1992, www.wholeterrain.org). The gallery displayed artists from Keene to the suburbs of Anchorage, Alaska, most were alumni. Their art explored the question "Where is Nature?" from myriad provocative and evocative perspectives.

Antioch New England
Three Year Comparison
July 1, 2006 - April 30, 2007

	Cash Gifts/pledge payments	Pledged but not paid yet	Total	Goal	#Donors	Alumni Giving		
Fiscal Year 2006-2007								
Restricted Gifts	\$54,048.66	\$119.10	\$54,537.76		77			
Endowment Funds	\$26,860.00		\$26,860.00					
Annual Fund	\$48,298.72	\$5,712.47	\$54,011.19		694	10%		
Grants	\$1,374,245.78		\$1,374,245.78					
In-Kind Gifts								
Planned Gifts Realized					1			
Planned Gifts Unrealized								
TOTAL	\$1,503,453.16	\$5,831.57	\$1,509,654.73		772			
Fiscal Year 2005-2006								
Restricted Gifts	\$232,464.45	\$404.96	\$232,869.41		217			
Endowment Funds	\$16,495.00		\$16,495.00		19			
Annual Fund	\$58,286.69	\$3,254.49	\$61,541.17		825	12%		
Grants*	\$1,419,450.66		\$1,419,450.66					
In-Kind Gifts								
Planned Gifts Realized								
Planned Gifts Unrealized								
TOTAL	\$1,726,696.80	\$3,659.45	\$1,730,356.24		1061			
Fiscal Year 2004-2005								
Restricted Gifts	\$112,695.25	\$0.00	\$128,623.34		79			
Endowment Funds	\$15,928.09				13			
Annual Fund	\$39,667.68	\$3,290.00	\$42,957.68		683	10%		
Grants*	\$1,272,164.47		\$1,272,164.47					
In-Kind Gifts								
Planned Gifts Realized								
Planned Gifts Unrealized								
TOTAL	\$1,440,455.49	\$3,290.00	\$1,443,745.49		775			
*Grants in these years are year-end totals								