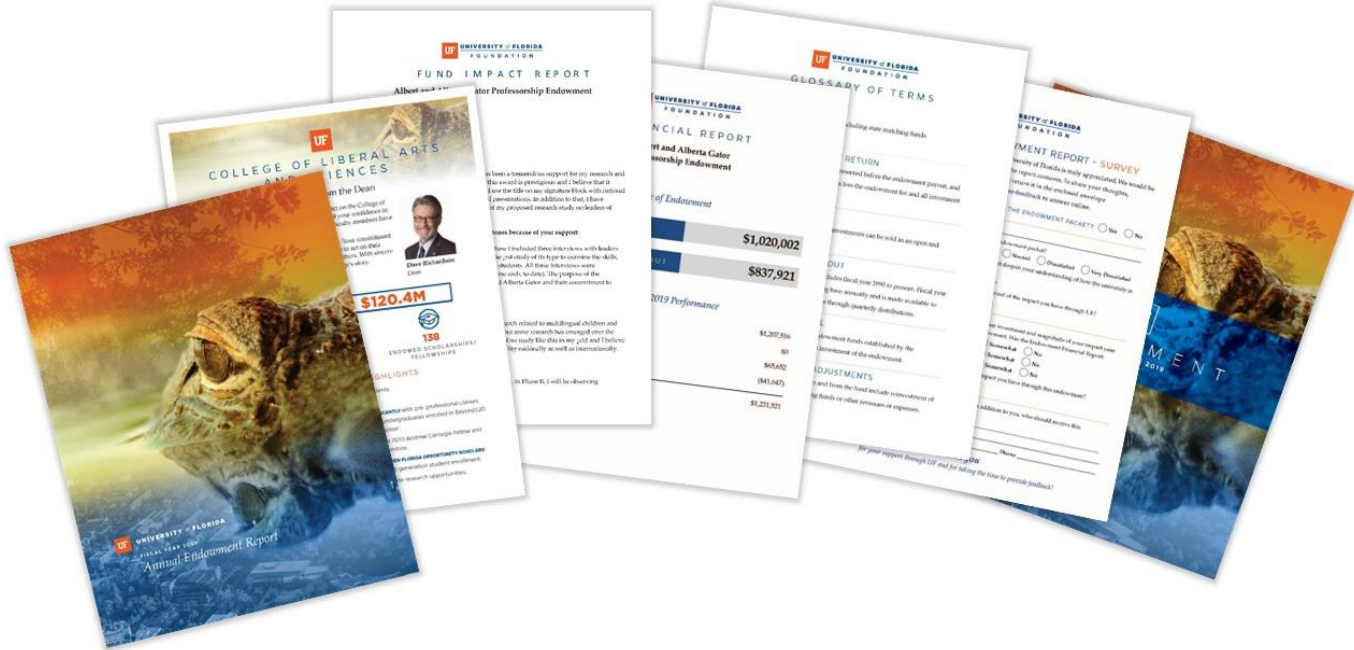


# Annual Endowment Reporting Enhancements at the University of Florida

## ADDITIONAL DOCUMENTS

### AER Components



### AER Deliverables by Tier

DELIVERABLE	TIER A	TIER B	TIER C
Message from VP (preprinted inside cover)	✓	✓	✓
Dean's message & College infographics (1-page insert)	✓	✓	✓
Personalized fund financial data	✓	✓	✓
UFF Endowment performance booklet	✓	✓	✓
Glossary of terms	✓	✓	✓
Donor satisfaction survey	✓	✓	✓
Scholarship recipient list	✓	✓	✗
Personalized fund impact report	✓	✗	✗

\*Approximately 20 top presidential prospects also receive custom hand signed notecard from VP of Advancement.

## AER Landing Page

### AER Portal

Search, Filter, and Information icons

**Saved Filters**: --Select Filter--

**Sorted by**: Fund ID

**Filtering By**: Clear All X Sort: Fund ID - Descending X Unit: Business Administration X Save Filter

<b>S</b>	<b>Richard E. Darby Accounting Scholarship - [007913]</b> Gary McGill [Redacted] (Fund Administrator Submit) (Tier A - FIQ Required)	Business Administration Tier: A	Modify
<b>S</b>	<b>Ronald and Vicki Canakar Business Scholars Endowment - [023755]</b> John Kraft [Redacted] (Not submitted) (Tier A - FIQ Required)	Business Administration Tier: A	Modify
<b>P</b>	<b>Berthy Family Entrepreneurship Endowment - [023665]</b> Jamie Kraft [Redacted] (Not submitted) (Tier B - FIQ Not Required)	Business Administration Tier: B	Modify
<b>P</b>	<b>Daryl and Dana Kenningham Study Abroad Endowment - [023443]</b>	Business Administration Tier: B	Modify

## Filter Capabilities

### HUBFilters

Home > m

Fund Type	College / Unit	FIQ Status	Tier
Select Item(s)	Select Item(s)	Select Item(s)	Select Item(s)

Fund Admin: Select Item(s)

Apply Cancel

**S** Richard E. Darby Accounting Scholarship - [007913] Business Administration Modify

## Fund Impact Questionnaire (FIQ) - Awarded Scholarship

### AWARDEES

Student First and Last Name: May Smith

Major: Anthropology

### NARRATIVE REVIEW

Please review the resulting narrative

It has been an extraordinary year for the University, and we have you to thank for our exceptional progress. We are pleased to share that the following individual(s) benefited from the [Redacted] fund scholarship this year:

**May Smith, Anthropology**

Thank you for helping the University of Florida to go further as we shape the future and improve lives. You are making a direct impact on the next generation of scholars and leaders. We are truly grateful for your generosity.



## Operational Highlights

	FY17	FY18	FY19
Reports completed	3,119	3,576	3,810
Mail date	November 22	November 5	November 1
CDFS imaging	7 months after mail date	2 weeks after mail date	1 Week after mail Date
FIQ completion rate	<80%	94%	97%
Required personnel for report compilation and mailing	6 Donor Relations employees + 18 Advancement volunteers	2 Donor Relations employees + 1 Temporary employee	2 Donor Relations employees + 1 Temporary employee

## Donor Relations Resources During AER Process

	FY17	FY18	FY19
Director of Stewardship	131 days/ 6 months <sup>1</sup>	86 days/ 3 months	80 days/ <3 months
Asst. Dir of Stewardship & Data	131 days/ 6 months	86 days/ 3 months	80 days/ <3 months
Asst. Dir of Donor Communications	43 days/ 2 months	21 days/ 1month	15 days/ < 1month
Donor Relations Assistant	10 days/ 0.5 months	5 days/ 0.25 months	5 days/ 0.25 months

## Donor Relations Staff Hours by AER Phase

	Portion of Work: FY18	Portion of Work: FY19
Phase 1: Data gathering and portal development	25%	35%
Phase 2: Portal opening and reporting period	30%	20%
Phase 3: Unit custom messages	15%	15%
Phase 4: Report compilation and mailing	30%	35%

## Survey of AER Partners (rating out of 5)

	FY18	FY19
Satisfaction with the 2018 AER process	4.0	4.08
Functionality of the AER portal	3.81	4.23
Customer service experience with Donor Relations	4.8	4.92

## Donor Feedback to AER Process

	FY17	FY18	FY19
Donor satisfaction rate	95%	96%	96%
Donor response rate	7.5 % (185 responses)	8.2% (208 responses)	10% (269 responses)
AER gifts received	\$33,000	\$75,000	\$5,800

<sup>1</sup> Represents the total amount of time each staff member spent working on the AER process out of 261 working days in a calendar year