

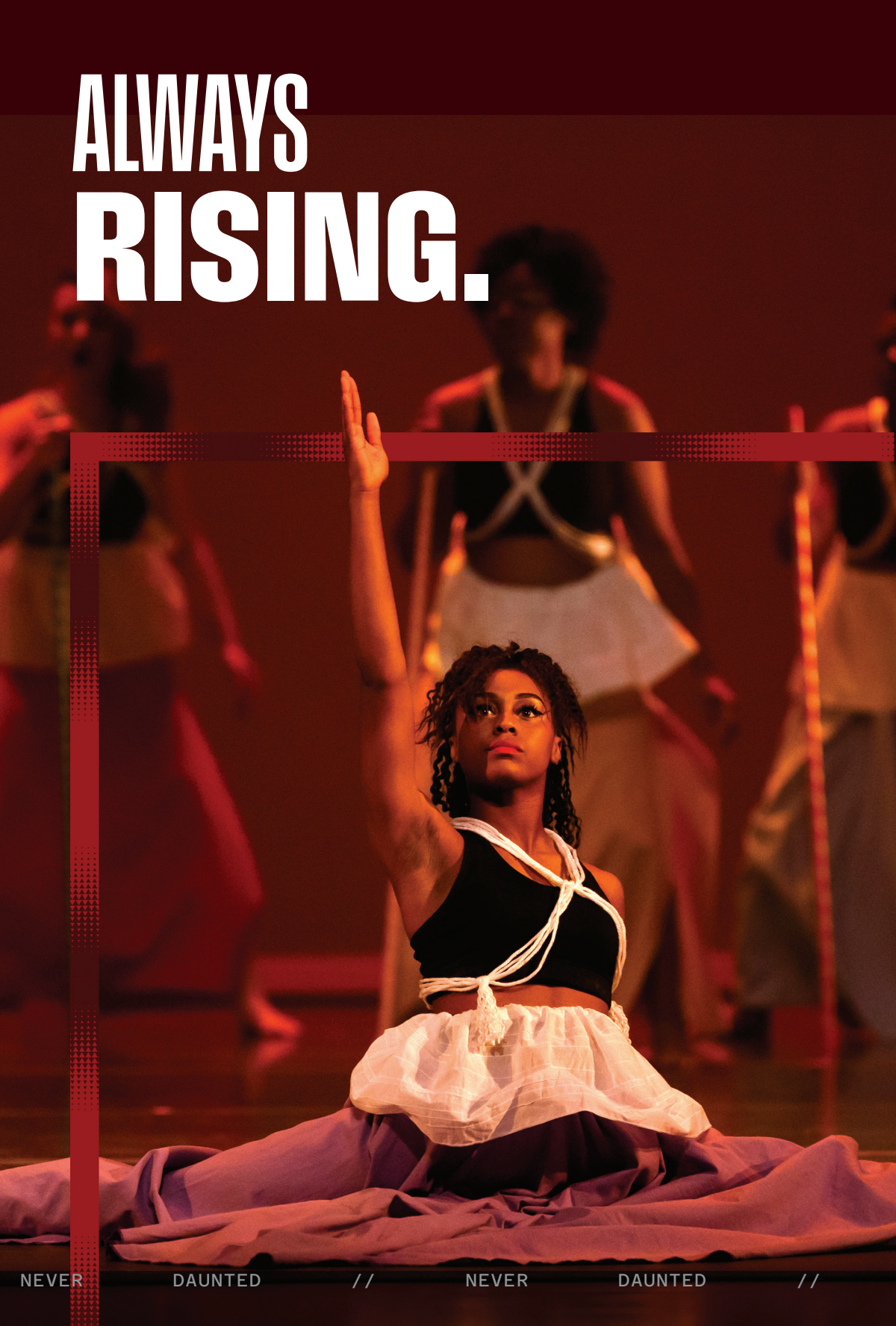
Campaign Leaders Guide

# NEVER DAUNTED

Indiana University's Campaign  
for the Future



# ALWAYS RISING.



Dear Volunteer Leader,

As we launch Indiana University's first fundraising and engagement campaign, we're not just focused on meeting targets—we're altering trajectories. From curing chronic diseases to closing the gap of unmet financial need for students, the Never Daunted campaign will redefine what a public university can achieve. As a campaign ambassador, you're part of the force that will make this possible.

This campaign is a declaration that the future will not outpace us—we'll shape it. We'll do that by expanding access to an IU education, relentlessly pursuing the next big breakthroughs, and delivering impact far beyond our nine campuses. Investments in IU—whether those are of time, talent, treasure, or testimony—will ensure that, whatever tomorrow demands, we're ready to lead the way.

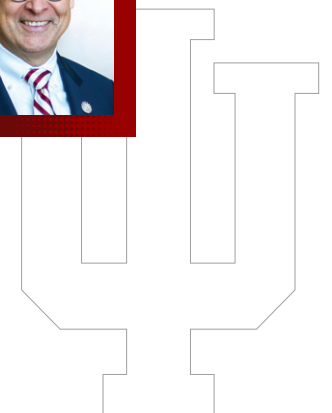
This handbook is your toolkit for action. Inside, you'll find the priorities, tools, and strategies to mobilize support and drive action. The IU Alumni Association and IU Foundation are your partners as you build momentum where it matters most.

Thank you for lending your leadership, influence, and conviction to IU during this transformative moment. With your help, what's next is limitless.

With gratitude,

**J.T. Forbes**

President and CEO, IU Foundation



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## EVERYTHING WE DO IS IN SUPPORT OF IU

The Indiana University Alumni Association and the Indiana University Foundation share a vision deeply rooted in connection, purpose, and progress. Together with our university partners, we create spaces of belonging for alumni and secure the philanthropic resources that help the university achieve its boldest ambitions—work that fuels IU’s future.

Founded in 1854, the Alumni Association has grown into a powerful global network representing more than 806,000 living alumni from IU’s nine campuses across the state. Whether you crossed the commencement stage three years ago or three decades ago, the Alumni Association helps you stay connected to the people and programs of IU through events, webinars, scholarships, and cherished IU traditions.

The Indiana University Foundation advances this same spirit by fostering lifelong relationships among alumni, donors, faculty, staff, and friends of the university to generate private support for IU.

The Foundation is also responsible for prudently managing the endowed gifts of donors to generate steady, long-term funding for the university’s people, places, and programs. Through expert fundraising and stewardship, the Foundation works alongside advancement staff at the university to empower every campus to turn possibility into progress.

**2020–21**

- **FOR ALL: The Indiana University Bicentennial Campaign** concludes (September 30, 2020); post-campaign review conducted
- President Whitten appointed as IU's 19th president (July 1, 2021)

**2022–25**

- **IU 2030: The Indiana University Strategic Plan** introduced
- Matrix Management Program implemented\*
- IU Foundation Services Review completed
- IUAA and IUF complete their individual 2021–24 strategic plans and create **Advancing IU 2030**, the first joint strategic plan for IUAA and IUF
- Campaign readiness assessment and feasibility study completed
- Campaign goals and overarching priorities identified by chancellors, deans, and lead development officers, in alignment with **IU 2030**

\*See glossary for definition of matrix management

**2026**

- Campaign operating plan finalized
- Year one of **Advancing IU 2030** completed
- Ongoing review, identification, and alignment of funding priorities with chancellors, deans, and lead development officers
- Campaign Leaders Summit—the public launch of the campaign—hosted (June 5, 2026)

**2027–30**

- Continued prospect engagement and solicitation
- Ongoing recognition of campaign impact and milestones
- Continued volunteer training and momentum
- Campaign conclusion celebration
- Post-campaign assessment

# “NEVER DAUNTED, WE CANNOT FALTER...”

At Indiana University, “never daunted” is more than a phrase repeated. It’s a conviction. An engine. A standard that shapes everything we do and everything we are.

“Never daunted” is the kind of “never” the world demands, particularly in the present moment—a time that calls for resilience and determination.

We need the kind of premier education that sends leaders into the world who are fearless and prepared. We need the kind of research that refuses to stop short of life-saving treatments and breakthroughs. We need the kind of commitment to community that turns bystanders into problem-solvers—whether they’re rallying to meet workforce needs, offering their time and talent to serve future generations, or championing our athletic teams as they offer powerful proof of what’s possible through gritty, unflinching teamwork.

Our momentum as an institution is undeniable. And with your support, our impact will accelerate. Discoveries will happen faster. Opportunities will reach further. Tomorrows will grow brighter.

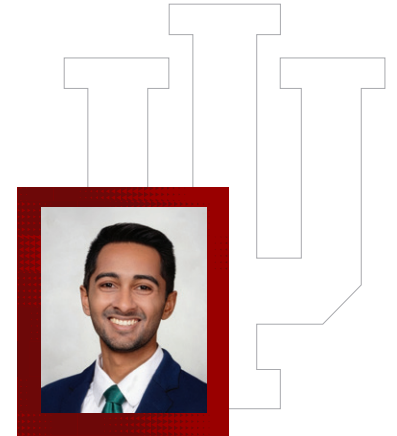
The following three priorities represent Indiana University’s promise for the future. We hope you’ll join us in digging deeper, dreaming bigger, and delivering more than we ever have before.

## ► PRIORITY 1: ENABLING STUDENT SUCCESS

Students are the heart and soul of Indiana University—the creative thinkers, unabashed dreamers, and determined leaders who will shape our communities for generations to come. Thus, we have declared student success as our highest philanthropic priority, with a focus on access and affordability.

Indiana University aspires to raise \$1 billion in student support, with a focus on minimally restrictive scholarships that will reduce financial barriers and ease university budget pressures.

A limited-time, IU Foundation-funded incentive program will encourage donor participation. (See Section 6 for more information.) We’ll also seek support for other initiatives that enhance student success and employability.



*“I truly appreciate your support for students. While this scholarship will help me go through college worry-free, it means more than just the scholarship itself. It’s a sign that someone believes in me and believes I can do great things. So thank you for instilling this confidence in me and many others. I hope to give back to IU when I’m in a position to do so, just like you.”*

**ADHITYA BALAJI**  
*Scholarship recipient, BS’23 in neuroscience and molecular life sciences; now a student at IU School of Medicine*

► **PRIORITY 2:  
FUELING LIFE-CHANGING  
DISCOVERY  
AND INNOVATION**

Indiana University is investing in research and innovation across biosciences, microelectronics, AI, business, the creative arts, and more. We're also tackling major health challenges like chronic disease, aging, and food security. Support for faculty, fellowships, and research will drive discovery, improve health, and enrich lives around the globe.



*"The researchers at IU have a long history of pursuing research and creative activity that change lives and improve our communities. As we continue advancing the goals of the IU 2030 strategic plan, I am excited to work with faculty, staff, and students across our campuses to support and grow groundbreaking discoveries and inspiring and impactful initiatives."*

**RUSS MUMPER**  
Vice President for Research



► **PRIORITY 3:  
STRENGTHENING  
COMMUNITIES  
AT HOME AND BEYOND**

Indiana University's global alumni network, vital workforce and economic development initiatives, and athletic tradition enrich and enliven the communities that IU touches. As the state's flagship university, we will enhance alumni involvement in the life of the university to grow the talent pipeline, cultivate a culture of philanthropy, and share the pride of Indiana with fans worldwide. In so doing, we will foster community and create lasting opportunities across Indiana and around the world.



*"For me, I really think it's all about investment in people; when people invest in you, you give back. When I think about my experiences at IU, they were just amazing. I had life-changing experiences. I know people say that all the time, but I really had life-changing experiences. And so, I see it as my responsibility to make sure students have these same rich, transformational experiences."*

**DAWN WHITEHEAD, BA'97, MS'03,  
PHD'07**  
Longtime alumni volunteer



## WHY ENGAGEMENT MATTERS

Philanthropy, in its truest sense, shapes Indiana University in countless meaningful ways. From creating new scholarships to facilitating shared experiences, our work is strengthened when engagement is intentionally woven into our campaign strategy. Including a focus on engagement enables us to better demonstrate and celebrate the full scope of IU's impact.

Just as we are committed to achieving IU's philanthropic goals through giving, we are equally invested in the powerful outcomes generated by the involvement of our alumni, fans, and friends. With the largest living alumni base in the United States, IU has a unique opportunity to activate a community whose time, talent, and testimony can powerfully accelerate the university's momentum.

### HOW CAN YOU AND THOSE IN YOUR NETWORK ENGAGE WITH IU IN A MEANINGFUL WAY?

The following are just a few ideas:

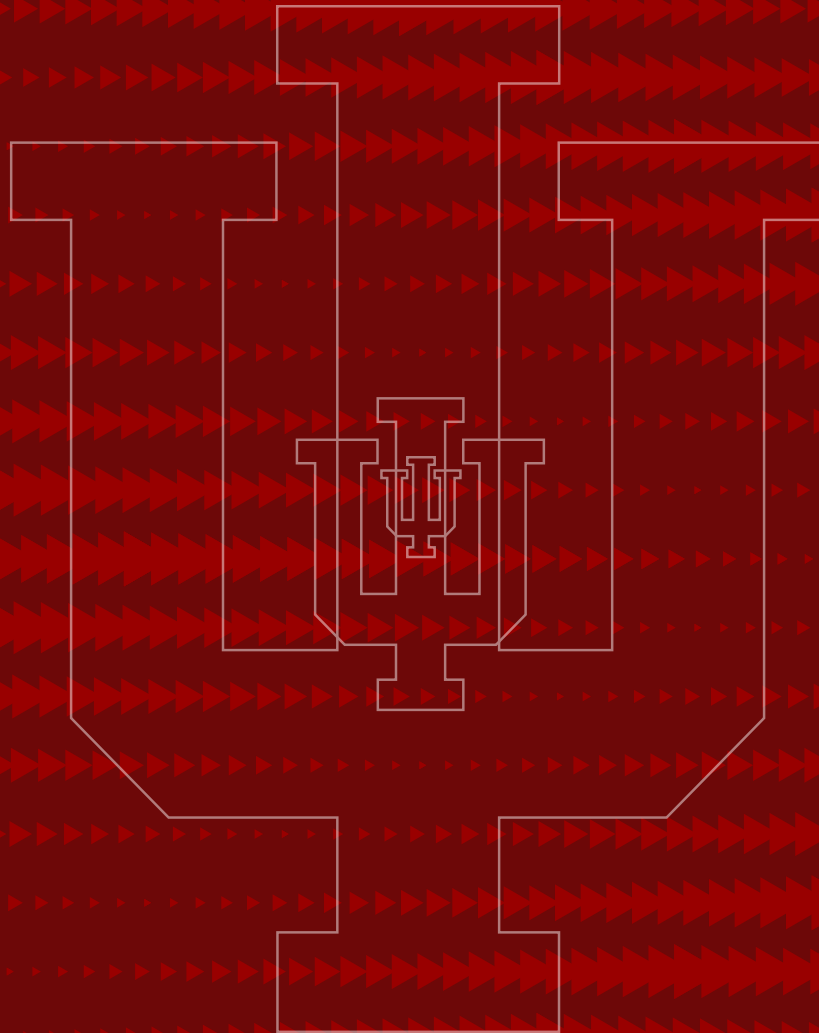
- Mentor a current IU student.
- Return to campus to share your expertise with students.
- Serve on an IU board or advisory council.
- Meet with a development or engagement officer.
- Attend an IU event—and invite others to join you! (They're held in Indiana, across the United States, and around the world.)

By launching a campaign that includes a dedicated engagement goal, we ensure all alumni, fans, and friends can see themselves reflected in the campaign—whether through giving, volunteering, attending programs, or sharing their IU story. This goal enables us to:

- Create meaningful opportunities for IU's passionate constituents to contribute through their time, talent, and testimony.
- Amplify stories that highlight IU's enduring mission, achievements, and impact.
- Measure and report on various ways that IU's alumni, fans, and friends are engaging with the university.
- Strengthen long-term philanthropic potential by nurturing deep and sustained relationships with all who love IU.

In short, including engagement measures as part of this campaign affirms and advances our commitment to nurturing an enthusiastic, dedicated body of alumni, friends, and fans—all of whom are vital partners in creating the bright future of IU.





## VOLUNTEER LEADERSHIP STRUCTURE

Indiana University will utilize the existing IU Alumni Association and IU Foundation boards of directors to serve as lead ambassadors for the campaign. Campus, school, and unit advisory and alumni boards (also sometimes referred to as dean's councils or alliances) will also play a key role for units around IU.

According to nonprofit consulting firm Gail Perry Group, volunteer leaders typically “inspire, influence, and invest” throughout the campaign.

- ▶ **INSPIRE**  
Act as ambassadors, motivate others, and share personal stories.
- ▶ **INFLUENCE**  
Leverage connections to introduce potential supporters to the campaign.
- ▶ **INVEST**  
Demonstrate commitment through investment of time and financial contributions.

The IU Alumni Association and IU Foundation boards each have a committee that will drive momentum among key stakeholders throughout the campaign. The Advancement Committee of the IUF board and the Strategic Outcomes and Planning Committee of the IUAA board will engage in discussions around campaign progress, key milestones, and other developments.



## ACCELERATING THE IMPACT OF SCHOLARSHIP GIFTS

Financial barriers remain one of the biggest obstacles to earning a college degree. Scholarships and fellowships help close this gap, empowering students to pursue academic goals with confidence—and without the burden of financial strain or crushing debt.

To address this crucial need, the IU Foundation created the Scholarship Impact Accelerator: a special initiative available to donors during the Never Daunted campaign. The accelerator program is designed to:

- Amplify the power of scholarship giving at Indiana University
- Get vital funding to students more rapidly
- Help donors quickly see their life-changing impact on IU students

The program applies to undergraduate, graduate, and professional school scholarships. When you give to a qualifying endowed fund—either an existing endowment or a new one you create—you will quickly enjoy the fulfillment of the incredible difference you're making in students' lives.

## HOW IT WORKS

Endowed scholarships are created when donors contribute gifts that are invested to generate spendable earnings in perpetuity. Many donors choose to fulfill these gift commitments over several years, resulting in a delay in the entire gift being invested and generating sufficient income to be awarded. Therefore, scholarships often aren't awarded until the endowment is fully funded. This timing can postpone both student support and the donor's opportunity to see their impact.

The Accelerator program changes that, allowing your generosity to start making an impact much sooner. Donors who make an outright gift or commit to a multi-year pledge toward a qualifying endowed scholarship will unlock awardable funds from the IU Foundation. These funds will be awarded as your scholarships annually for the next four years, as illustrated in the following examples.

### ► The Carol Cream and Chris Crimson Scholarship

Carol and Chris commit \$50,000 over five years. While they make their annual \$10,000 payments, the IU Foundation provides \$2,250 of Accelerator funds each year for four years to award Cream and Crimson Scholarships. During this time, the earnings from Chris and Carol's annual payments are reinvested to grow the fund, amplifying its long-term impact. Once the scholarship endowment is fully funded, it begins generating its own scholarship awards and the Accelerator funds end.

### ► The Bison Family Scholarship

Jane and David Bison make a \$5,000,000 outright gift. The IU Foundation provides \$225,000 of Accelerator funds annually for four years to award scholarships immediately. During this time, the earnings from the initial gift are reinvested to grow the fund, amplifying its long-term impact. From year five onward, the Bison Family Scholarship endowment provides the annual scholarship awards and the Accelerator funds end.

## NEXT STEPS

If you would like to learn more about the Scholarship Impact Accelerator, simply reach out to your development officer. They can meet with you to learn more about your philanthropic interests and goals.

These questions can help guide your thinking ahead of time, as you consider the impact you'd like to make:

- Is there a specific **IU campus** you want to support?
- Do you have a **preferred school or unit**?
- Would you like to learn more about **priorities or needs**?
- Do you prefer to assist students with **financial need**, reward **academic excellence**, or **both**?
- Would you be interested in **fully funding one or more students' tuition and fees** for their entire IU experience?

**THANK YOU FOR  
BEING A CHAMPION  
FOR IU STUDENTS.**

**Your generosity will shape the  
next generation of leaders and  
difference-makers.**



## WHY WE NEED YOU

Volunteers like you are essential representatives of Indiana University, helping advance IU's philanthropic priorities by promoting engagement and providing crucial support. Your involvement is vital to the success of this campaign.

As part of a dedicated network of IU volunteers, you play a key role in building relationships, opening doors with prospective supporters, and championing the mission and impact of Indiana University.

### SETTING YOU UP FOR SUCCESS

An initiative of this magnitude is a true team effort. We will only achieve our shared vision for IU if we work collaboratively and support one another. Therefore, we want to ensure you're equipped with the resources you need to succeed, and that you understand the vital role you play in creating the bright future of Indiana University.

Throughout the Never Daunted campaign, you will partner with advancement staff from your campus, school, or unit to learn more about how you can make a difference in your specific area of the university. IU has many different needs, and one size doesn't fit all. The ideas on the following pages are simply a starting point; talk with your IU staff partner to learn more about how you can make the greatest impact.



### WAYS ADVANCEMENT STAFF WILL HELP YOU

- Provide you with helpful background information and materials for your conversations with peers and prospects.
- Collaborate with you on strategies.
- Help you with correspondence, such as invitations.
- Accompany you on visits, as appropriate.
- Provide you with networking opportunities with university leadership and insider updates as they're available.

### WAYS YOU MIGHT HELP IU AND ITS ADVANCEMENT EFFORTS

- Meet with your unit's advancement staff and/or leader to learn about specific needs and goals.
- Share IU's mission, impact, and priorities with your personal and professional networks.
- Use your social media channels to amplify IU stories and achievements, building affinity and pride.
- Represent IU at public functions and community gatherings.
- Host IU interns at your company or organization.
- Share how alumni and prospects you know would like to engage with the university, including their interest in opportunities such as:
  - › Volunteering or serving on committees or boards
  - › Attending a briefing session with volunteers and/or academic leadership
  - › Visiting campus for special events—such as award programs, lectures, and arts or athletic events
  - › Touring new or renovated facilities
  - › Meeting with students
- Participate in peer screening of alumni, parents, and friends of IU; share information you may know about a prospect's capacity or philanthropic interests.
- In partnership with IU staff, host small gatherings of supporters.
- Communicate regularly with your IU staff partner, including updating them on your progress and staying aligned with their priorities and goals.

# MAKING THE CONNECTION WITH PROSPECTIVE SUPPORTERS

As a volunteer, your goal is to encourage a deeper level of understanding and involvement among prospective supporters—key activities that may lead to a gift. IU’s development professionals are ultimately responsible for presenting proposals and asking prospects for gifts.

The following are some examples of how you might engage in conversations with prospects and facilitate greater connection with IU.

## SMALL GATHERINGS WITH IDENTIFIED SUPPORTERS

Hosting small gatherings in partnership with IU staff is an opportunity to gain a deeper understanding of the interests of supporters. This is a great opportunity to:

- Prepare a plan with your development officer in advance, to discuss prospects’ interests and how they might become involved.
- Share your personal reasons for supporting the campaign.
- Learn more about the relationship a prospect has or wants to have with IU.
- Ask about the areas of the university they currently support—and why.
- Ask about other causes they support and how IU could become one of those causes.
- Use your development officer, dean, or director to answer technical and/or tough questions.

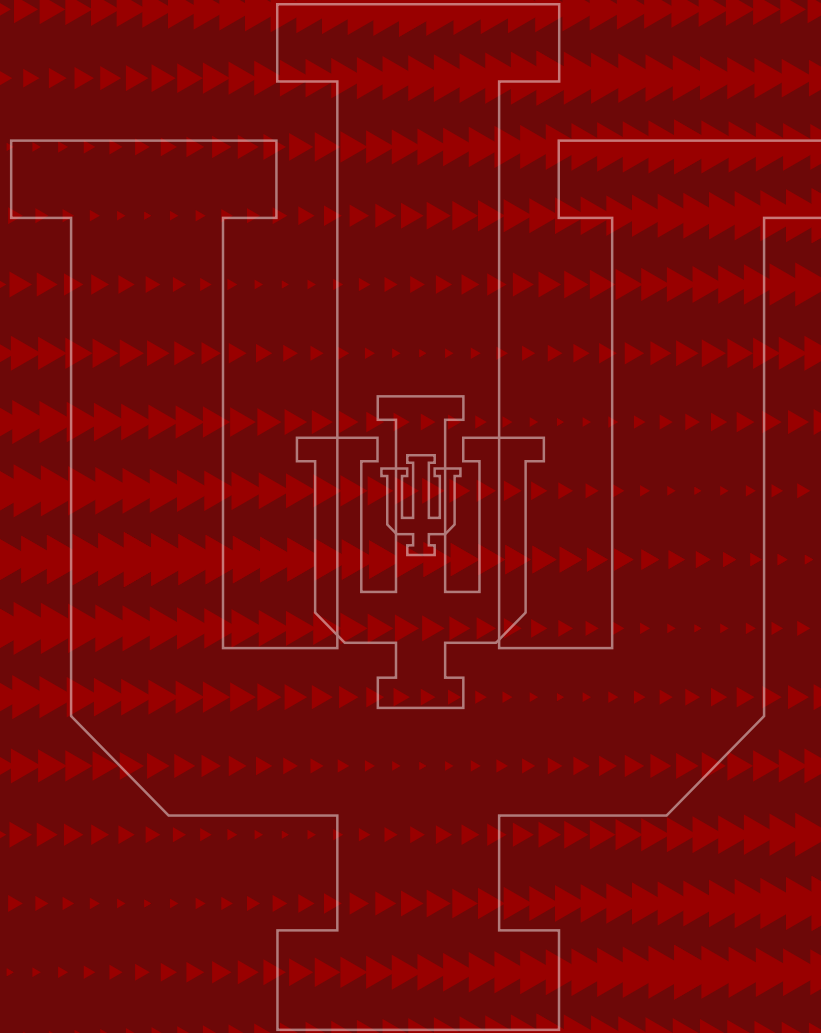
## MAKING INTRODUCTIONS TO UNIVERSITY LEADERSHIP AND DEVELOPMENT STAFF

Your goal in this effort is to open the door for a visit with a prospect, rather than to secure a specific appointment. These introductions should:

- Use a memorable or common experience as a way to connect.
- Rely on information regarding the prospect’s disposition and history with IU to guide your conversation.
- Determine if the prospect would welcome a conversation with an IU advancement staff member or leader.

**THANK YOU FOR INVESTING YOUR ENERGY IN THIS PROCESS!**

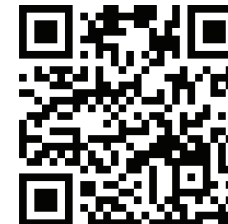
**As a volunteer, you are an essential partner in generating critical support for Indiana University.**



## WAYS TO GIVE

We understand that every donor's decision to give is deeply personal and often involves thoughtful financial and estate planning. IU staff can partner with you and other donors to design a giving plan that reflects your philanthropic vision and meets your unique needs while also supporting Indiana University's priorities.

Learn more about the many ways to give to IU—from cash, stock, or cryptocurrency to gifts of real estate to employer matching gifts.



Scan the QR code here  
or visit  
[go.iu.edu/ways-to-give](https://go.iu.edu/ways-to-give)  
(URL is case-sensitive)

# FAQ

## Q: WHY IS INDIANA UNIVERSITY IN A CAMPAIGN?

This is a pivotal moment in the life of the university. We must build on our current momentum to ensure our institution—and most importantly, our students—continue to thrive in an ever-changing world. To do so, we have to be vigilant in focusing on the work that can make a real difference in the lives of our students and in the work of our faculty, whose innovation profoundly impacts the communities we serve.

## Q: WHY IS PRIVATE PHILANTHROPY NECESSARY FOR A PUBLIC INSTITUTION?

Private philanthropy is essential to Indiana University's strength and stability. State funding covers a smaller portion of the university's operating budget than ever before, making philanthropic investment increasingly important to sustaining IU's tradition of excellence and ensuring continued growth, innovation, and access for future generations.

## Q: HOW WILL MY GIFT MAKE AN IMPACT IN SUCH A LARGE CAMPAIGN?

Indiana University will only reach its goal through the collective generosity of alumni, parents, and friends giving at every level. Every gift helps move us closer to our shared vision. A campaign of this scale takes time—and along the way, each contribution will make a meaningful difference in the lives of our students, faculty, communities, and the future of Indiana University.

## Q: HOW WILL MY GIFT BE USED?

Your gift directly supports the IU campus, college, school, program, or cause you choose. You may give to a university-wide effort—such as the IU Student Support Scholarship—or to a specific department or initiative that's meaningful to you.

## Q: WHAT KINDS OF PROJECTS DO DONORS SUPPORT IN A CAMPAIGN?

Donors contribute to a wide range of programs and projects that advance IU's mission in every corner of the university. Philanthropic support fuels student scholarships, faculty positions, capital projects, research, and other strategic priorities. Some gifts build upon state support to elevate specific programs, while others strengthen the university's endowment to ensure long-term, stable funding.

## Q: CAN INDIANA UNIVERSITY USE DONOR FUNDS TO LOWER TUITION?

While donor funds cannot be used to directly reduce tuition rates, many gifts support scholarships and fellowships that offset the cost of attendance. Each year, thousands of Indiana University students benefit from generous philanthropic support.

## Q: WHAT GIFTS COUNT TOWARD THE CAMPAIGN GOAL?

This is a comprehensive campaign, meaning that all gifts, pledges, and qualifying philanthropic and non-governmental grants count toward the goal. We also include documented bequest intentions and other planned gifts that demonstrate a commitment to IU's future.

## Q: CAN CAMPAIGN DONATIONS BE USED TO BOOST FACULTY SALARIES?

In a sense, yes. Many gifts establish endowed faculty positions, which provide additional resources to attract and retain exceptional educators and researchers. To learn more about supporting endowed faculty positions, please contact your development officer.

## Q: WILL ALL AREAS OF IU BENEFIT FROM THE CAMPAIGN?

Yes. Every campus, school, and unit—including athletics—has identified its own priorities and goals within the campaign. Together, these collective efforts ensure that every part of Indiana University benefits from the power of philanthropy.

## Q: WHY SHOULD I DOCUMENT AN ESTATE GIFT?

By documenting your estate gift, you help ensure that your philanthropic wishes are honored exactly as you intend. Sharing your plans enables IU to review your documentation, confirm that your gift can be used as you envision, plan for the future, and thank you for your generosity. To learn more about how to document an estate gift, contact the Office of Gift Planning Services at 800-558-8311 or [giftplan@iu.edu](mailto:giftplan@iu.edu).

## Q: WHAT IS THE BEST WAY FOR ME TO DIRECT SOMEONE WHO WANTS TO VOLUNTEER FOR IU?

Refer them to engagement staff at their campus, school, or unit of interest, or reach out to the IU Alumni Association.

## Q: HOW DO I KNOW THAT WHAT I'M DOING IS RECOGNIZED AS ENGAGEMENT?

Engagement includes volunteerism, donating financially to IU, attending events and experiences (including digital ones!), meeting with a development or engagement officer, and engaging with us through website downloads and profile updates. The IU Alumni Association, IU Foundation, and our campus, school, and unit partners track and record this activity on your behalf, allowing us to showcase the numerous ways alumni, donors, fans, and friends give back and make an impact at IU.



# IU FAST FACTS AND POINTS OF PRIDE

Founded in 1820, creating more than 200 years of impact in education, research, and public service

Known for cutting-edge, interdisciplinary research in areas such as global health, cybersecurity, climate solutions, and the arts

9 campuses statewide, including Bloomington, Indianapolis, Columbus, Fort Wayne, Gary (IU Northwest), Kokomo, New Albany (IU Southeast), Richmond (IU East), and South Bend; also, a Capital Campus in Washington, D.C.

Consistently recognized for value, access, and support for first-generation and underserved students

Contributes \$10 billion annually to Indiana's economy

806,000+ alumni worldwide, the largest living alumni network in the nation, with presence in 167 countries and every Indiana county

Enrolls more in-state students than any other public university in Indiana

4,000+ students studying abroad each year in 70+ countries

Offers 930+ academic programs, including nationally ranked offerings in business, music, law, education, and medicine

Over 1,500 student organizations, across all IU campuses, which help create iconic traditions like the Little 500

Home to the world's first school of philanthropy, the nation's first school of informatics, and the country's largest medical school

40 Division I sports teams at IU Bloomington and IU Indianapolis; 65+ NAIA athletic teams across six regional campuses

# GLOSSARY

## ADVANCEMENT

The collective engagement and development activities that generate support for Indiana University.

Advancement work at IU is a shared effort among the IUAA, IUF, and IU staff who are responsible for alumni engagement and development. It encompasses a wide range of business functions, including annual giving, alumni engagement, marketing and communications, fundraising, gift processing, data and prospect management, stewardship, and donor relations.

## ADVANCING IU 2030

Indiana University's first collaborative strategic plan for advancement, integrating the work of the IUAA and IUF, and the roles of campuses, schools, and units (CSUs) in alumni engagement, donor relations, and development. Advancing IU 2030 supports the advancement priorities of IU 2030: The Indiana University Strategic Plan.

## ADVISORY BOARD

A group of individuals, often associated with a specific campus, school, or unit, that helps raise funds, advise leadership, and serve as ambassadors for Indiana University. These groups may also be referred to as a dean's advisory council or alliance, an alumni board, or other similar terms.

## AFFINITY GIVING

Coordinates efforts of IUF's affinity giving programs—including the Black Philanthropy Circle, Latino Philanthropy Circle, Queer Philanthropy Circle, and Women's Philanthropy at IU—to strengthen relationships and giving among a broad array of constituents.

Affinity Giving activates volunteers and donors via giving circles to maximize engagement, drive fundraising to support inclusive giving, and identify areas of intersectionality to increase the groups' collective and individual philanthropic impact on Indiana University.

Note: The Women's Philanthropy Institute (WPI) is a separate entity, which is a part of the IU Lilly Family School of Philanthropy.

## ALUMNI COMMUNITY

Groups of IU alumni formed around shared identities, experiences, schools, campuses, or geographic regions. Supported by the IUAA through staff, funding, data, and communication resources, IU's 113 chartered alumni communities advance the mission of both the IUAA and the university.

- **Affiliate groups:** Centered on shared identity or experience (e.g., Latino Alumni Association, Marching Hundred Alumni Association).
- **Constituent groups:** Organized around an academic school, unit, or regional campus.
- **Geographic groups:** Often referred to as chapters or markets and defined by where alumni live. Indiana-based markets are increasingly supported by local regional campuses that engage all IU alumni in their area.

## ALUMNI ENGAGEMENT

Activities that build meaningful, mutually beneficial relationships between alumni and the university. Engagement efforts inspire loyalty, financial support, and advocacy, while strengthening IU's reputation and advancing its mission.

## ANNUAL GIVING

The ongoing financial support of IU through yearly contributions. At IU, donors giving under \$10,000 annually are considered annual donors. The central Annual Giving team leads donor acquisition, retention, and reactivation strategies, as well as multi-channel campaigns and matching gift programs throughout the year.

## ANONYMOUS GIFT

- **Public anonymity:** Donor name is not publicly listed, but is accessible to staff of the Indiana University Foundation.
- **Institutional anonymity:** Donor identity is known only to key leadership (e.g., CEO and/or CFO) and kept confidential to most internal staff.

## BOARD OF MANAGERS

The governing body of the IU Alumni Association. This 14-member volunteer board (including a student representative and the IUAA Chief Alumni Officer) oversees the financial and operational policies of the association.

## CALENDAR YEAR

The period from January 1 to December 31.

## CAMPAIGN PLAN

The operational framework and documentation outlining the strategies, structure, and goals for a campaign.

## CAMPAIGN READINESS

The process of ensuring that IU's people, strategies, systems, and volunteers are aligned with campaign goals. It involves assessing development operations to ensure optimal readiness for success.

## CASE FOR SUPPORT

A nonprofit's core message that articulates what will be accomplished with donor support and how contributions will create measurable impact.

## COMPREHENSIVE CAMPAIGN

A coordinated effort with a defined financial goal and timeline, designed to raise funds for specific university priorities such as scholarships, professorships, or capital projects.

## CAMPUS, SCHOOL, UNIT (CSU)

A term (and acronym) used to describe the organizational entities within IU that partner in advancement efforts. These entities are sometimes also referred to as "advancement partners."

## DEVELOPMENT

The process of creating, nurturing, and enhancing relationships with donors to secure financial support for current and future needs.

## DEVELOPMENT OFFICER

A fundraising professional focused on the disciplined, strategic cultivation and securing of major, principal, and planned gifts through donor cultivation and relationship management. They identify, solicit, and steward donors to ensure long-term financial sustainability. At IU, 40 lead development officers and more than 100 professional fundraisers are responsible for major gift efforts across the university.

## DONOR ENGAGEMENT PROCESS

A framework describing the stages of a donor's relationship with IU. It includes:

- **Identification:** recognizing prospects with capacity and interest
- **Qualification:** engaging prospects to assess inclination and ability to give
- **Cultivation:** building relationships and aligning passions with IU priorities
- **Solicitation:** requesting a gift commitment
- **Stewardship:** expressing gratitude and demonstrating impact while honoring donor intent over time

**ENDOWMENT**

A permanent source of financial support for IU. An endowment is composed of donor-designated funds that are invested to generate income for scholarships, faculty positions, research, and other priorities—ensuring that each gift creates impact today and for generations to come.

**ENGAGEMENT OFFICER**

A professional staff member who is responsible for fostering, managing, and strengthening relationships between an institution and its stakeholders—including students, alumni, and community partners. They promote the university's mission, increase visibility, support student success, and often drive collaborative and philanthropic initiatives.

**EXECUTIVE COUNCIL**

The advisory body of the IU Alumni Association, composed of the Board of Managers and at-large members representing all types of chartered alumni communities.

**FISCAL YEAR**

The period from July 1 to June 30.

**GIFT AGREEMENT**

A legally binding document between the donor(s), IUF, and the IU campus, school, or unit benefiting from the gift. It specifies how funds will be invested, used, and administered over the life of the gift.

**GIVING AND RECOGNITION SOCIETIES**

Programs that acknowledge donors for specific or cumulative contributions, often providing special engagement and recognition opportunities.

**INDIANA UNIVERSITY ALUMNI ASSOCIATION**

The organization that engages, connects, and mobilizes IU alumni worldwide in support of the university's mission.

**INDIANA UNIVERSITY FOUNDATION**

The primary entity responsible for raising, managing, and stewarding private philanthropic support for Indiana University.

**INDIANA UNIVERSITY VARSITY CLUB**

An organization supporting IU Bloomington's intercollegiate athletics programs through engagement and fundraising activities.

**IU 2030 AND ADVANCING IU 2030**

The strategic plans of Indiana University and IUAA/IUF, respectively. IU 2030 reflects the university's bold aspirations around the three core pillars of student success, research and creative impact, and service to the state of Indiana and beyond. Advancing IU 2030 is the first joint strategic plan for IUAA and IUF, designed to support the pillars of IU 2030.

**IU DAY**

An annual day of giving and engagement designed to celebrate IU and raise philanthropic support for university priorities.

**MAJOR GIFT**

Indiana University's definition is a gift of \$50,000 or more, whether the gift is made outright, pledged over five years, or documented though a planned gift.

**MATRIX MANAGEMENT**

A hybrid development model where the management of lead development officers is shared between the IU Foundation and leaders at the university, campus, school, or unit. This approach enables IUF to maximize fundraising effectiveness and output by redeploying both human and financial resources in ways that reduce unit budget pressures and attract even greater accountability and investment from IUF. Nearly 100 percent of IU lead development officers are a part of this program.

**MAXIMIZE PRIVATE SUPPORT**

Contained in the first sentence of the Indiana University Foundation's mission, "maximize private support" entails aligning advancement resources to raise and utilize donor funds most effectively for IU.

**PHILANTHROPY**

The Lilly Family School of Philanthropy defines philanthropy as:

- goodwill to fellow members of the human race
- active effort to promote human welfare
- an act or gift done or made for humanitarian purposes
- an organization distributing or supported by funds set aside for humanitarian purposes

Philanthropy at IU encapsulates the many ways alumni and friends participate in the mission of the university, often described as the gift of time, talent, treasure, and testimony. This is an important piece of the "why" for an advancement plan and a way to clearly show the link between the IU Alumni Association and the IU Foundation.

**PLANNED GIFT**

A gift arranged in advance—typically through a donor's will, trust, or other estate planning vehicle—that aligns the donor's financial and philanthropic goals.

**PLEDGE**

A multi-year commitment to give a specific amount, typically divided into annual contributions over up to five years.

**PLEDGE PAYMENT**

Payment of all or part of a pledged gift in accordance with the agreed-upon schedule.

**PRINCIPAL GIFT**

Indiana University's definition is a gift valued at \$5 million or more.

**PUBLIC PHASE**

The portion of a campaign when fundraising efforts are publicly announced, typically following the silent phase, once campaign momentum has been established.

**PLANNING PHASE**

The early portion of a campaign prior to public announcement, focused on cultivating lead gifts and building momentum for the public phase.

**SENIOR MANAGEMENT TEAM (SMT)**

IU Advancement's executive leadership team, which includes senior leaders from functions ranging from lifelong engagement and giving to finance to development and more.

**STEWARDSHIP**

The ethical management and accountability of contributed resources, including donor recognition and impact reporting. The IU Foundation's Donor Relations and Stewardship program coordinates thank-you letters, endowment statements, event tickets, and other recognition activities to strengthen donor relationships.

**TRANSFORMATIONAL GIFT**

Indiana University's definition is a gift valued at \$50 million or more.

# FROM INSIGHT TO ACTION

Use these five quick summaries to jumpstart your conversations as a campaign leader.

## ▶ QUICK TAKE 1: The Never Daunted campaign at a glance

These talking points are a concise way to describe the campaign.

- Never Daunted is a comprehensive fundraising and engagement campaign that unites all IU campuses around a shared vision for the future.
- The campaign is focused on expanding opportunities for the students, faculty, and communities we serve.
- Campaign leaders like you are partners and co-architects in this endeavor, not just supporters.

## ▶ QUICK TAKE 2: Campaign priorities & IU fast facts

Pick one or two points to emphasize when you chat with others. Pair facts with a personal connection.

- **Priority 1— Student Success:** access, affordability, scholarships, and persistence
- **Priority 2— Discovery & Innovation:** research, faculty excellence, and breakthrough ideas
- **Priority 3— Strengthening Communities:** alumni engagement, workforce impact, athletic experiences, and statewide reach
- **IU fast facts:** 9 campuses in Indiana and a Capital Campus in Washington, D.C.; 930+ academic programs; 806,000+ alumni worldwide; \$10B annual economic impact in Indiana

## ▶ QUICK TAKE 3: Your role as a campaign leader

Your influence is most powerful when it's authentic, consistent, and relational.

- You are a trusted insider with credibility in your community.
- Your role is to inspire confidence, share impact, and open doors.
- IU staff partners support strategy, follow-up, and formal fundraising steps.
- Philanthropy can include time, talent, treasure, and testimony.

## ▶ QUICK TAKE 4: Micro-activations

Small actions create momentum. Choose what fits your context— board meetings, alumni communities, regional events, or informal gatherings.

- Share one IU story with someone in your network.
- Invite one person to an IU event or conversation.
- Post once on social media, using supplied templates.
- Make one warm introduction or submit one name for staff follow-up.

## ▶ QUICK TAKE 5: Conversation guides

These tips will help you communicate clearly and confidently in real time.

- Lead with impact, not dollars.
- Share one authentic IU story.
- Invite one next step that feels natural.
- Hand off details and follow-up to IU staff partners when needed.





Dear Volunteer Leader,

On behalf of the IU Alumni Association Board of Managers and the IU Foundation Board of Directors, **thank you.** We are deeply grateful for your dedication and your generous commitment of time, talent, treasure, and testimony in support of Indiana University.

At this pivotal moment in IU's history, we are reminded that our greatest strength has always been our people. You—our volunteers, leaders, partners, and champions—are at the heart of IU's ability to inspire alumni, engage donors, and strengthen connections with friends and fans across the state and around the world.

This campaign is ambitious—not only in its goals for engagement and philanthropic support, but in our shared vision for what IU can accomplish in the years ahead. Achieving that vision will require strong leadership, authentic relationship-building, and a broad coalition of committed volunteers. Your willingness to step forward and help makes all of this possible.

Thank you for representing IU with integrity and enthusiasm. Together, we will ensure that IU continues to transform lives and strengthen communities for generations to come.

With gratitude,

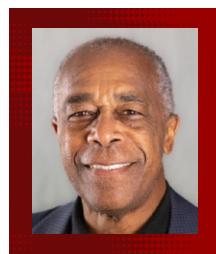
**Dr. Yung Nguyen, BS'89, MD'95**

Chair, IU Alumni Association  
Board of Managers



**Louis Jordan, MBA'80**

Vice Chair, IU Foundation  
Board of Directors



**NEVER DAUNTED**

Indiana University's Campaign for the Future



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