

Authentic Stewardship at the Principal and Major Gift Level

Stewardship Objectives

- **Maintain the focus** on the donor, not the gift
- **Strengthen the relationship** between the donor and your institution
- **Collaborate** with philanthropy staff to develop stewardship strategies prior to the gift
- **Determine** stewardship non-negotiables

Develop Deeper Connections

- Consistent and thought provoking stewardship
- Demonstrate transparency and impact
- Leverage existing tools to enhance engagement
- Create donor experiences of authentic gratitude
- Develop creative and relevant recognition

Consistent and Thought Provoking Stewardship



The African-American Scholarship Support Fund

Established in 2014, the African-American Scholarship Support Fund provides scholarship support for African-American students in any academic discipline at Rush. The funds will be awarded in academic year 2015-2016 and split between the medical and nursing colleges.

Academic Year	Income Fund Balance	Award Amount	Scholarship Recipients
2014-2015	\$50,000	\$25,000	RMC - TBD
		\$25,000	CON - TBD



We are very thankful for the support we have received over the years from the scholarship to establish scholarships at Rush University in support of our African-American student population.

In 2014-2015, 6 percent of our Rush College of Nursing student population and 5 percent of our Rush Medical College population self-identified as African-American. With your support, you give Rush a platform to recruit and support underrepresented minority students in pursuit of world-class medical education.

Your generosity also gives our student population a sense of economic security so they can concentrate on their education. For this and all that you do, Rush University remains sincerely grateful.

These students — and many others — will achieve their dreams, and enhance the lives of others thanks to you.



The Endowed Scholarship for African-American Students Rush Medical College Alumni Recipients



2005-2006 Scholarship Recipient

Kimberly Johnson, MD, is a family medicine doctor in Chicago, Ill. She has been in practice for nine years and was a resident at Illinois Masonic Medical Center.



2006-2007 Scholarship Recipient

Emily Ross, MD, is now an emergency medicine physician. After her residency at Lincoln Hospital and fellowship SUNY Downstate College of Medicine, Emily now practices in Brooklyn, New York.



2007-2008 Scholarship Recipient

Margo Rollins, MD, is currently practicing at Children's Healthcare of Atlanta and specializing in pediatric hematology/oncology. Margo has dedicated much of her work to the research of sickle cell disease.



2008-2009 Scholarship Recipient

Carl Lambert, MD, is currently an attending family physician in the south suburbs of Chicago. Carl is working towards a faculty appointment at Rush.



2008-2009 Scholarship Recipient

Elisha E. Peterson, MD, is a pediatric pain fellow at Boston's Children's Hospital. Specializing in anesthesiology, she also has been affiliated with Washington University School of Medicine and St. Louis Children's Hospital.

"Each day is different. Each day brings on new challenges. Knowing that I am able to make a positive change in someone's life is an amazing feeling to have, and I wouldn't have it any other way."

-Kimberly Johnson, MD



RUSH MEDICAL COLLEGE • COLLEGE OF NURSING • COLLEGE OF HEALTH SCIENCES • THE GRADUATE COLLEGE

ADRP Midwest Forum — Yvette Grooms

FOR FISCAL YEAR 2015, RUSH'S ENDOWMENT RETURNED **2.8 PERCENT**, LESS THE INVESTMENT MANAGER FEES.

Over the past 10 years, the endowment has grown by \$135.2 million while providing \$162.5 million in support of Rush's mission.



FISCAL YEAR 2015: ENDOWMENT HIGHLIGHTS

- Despite a moderate portfolio return in fiscal year 2015, the endowment's longer-term performance remains strong (five-year annualized return of 9.1 percent).
- The portfolio gained 13.1 percent for the year as all asset classes generated positive returns.
- At fiscal year-end, the endowment had \$524 million in assets. This represents the largest market value in the endowment's history.
- The endowment provided \$17.0 million in support of programs and services.
- Endowment distributions have increased annually for five consecutive years.

	FY2011	FY2012	FY2013	FY2014	FY2015
MARKET VALUE (in millions)	\$436	\$432	\$474	\$523	\$524
GIFTS (in millions)	\$10	\$7	\$6	\$5	\$4
DISTRIBUTIONS (in millions)	\$15	\$16	\$16	\$17	\$17
INVESTMENT RETURN	17.0%	1.3%	12.0%	13.1%	2.8%

ENDOWMENT GROWTH

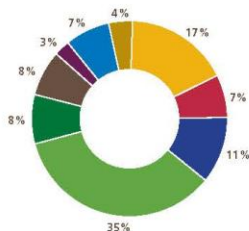
Endowment growth is only meaningful if it is able to translate into increased support for the institution and its mission. In fiscal year 2015, the endowment provided support of \$17.0 million — approximately 25 percent more than that of 10 years ago. The endowment's current spending policy is 4 percent applied to a hybrid formula that uses a five-year average of endowment asset values and previous year's spending adjusted for inflation.

ENDOWMENT GROWTH FY2006-FY2015



SUPPORT BY PROGRAM

The generosity of our donors, coupled with investment returns, resulted in the growth of endowment distributions over the past decade.



ENDOWMENT SUPPORT BY PROGRAM

- Unrestricted
- Student Financial Aid
- Research
- Professorships
- Miscellaneous
- Charity Care
- Fellowships
- Education
- Scholarship

ASSET ALLOCATION

ASSET CLASS	JUNE 2015 ALLOCATION	TARGET ALLOCATION	VARIANCE TO TARGET
PUBLIC EQUITY	42%	40%	+2%
FIXED INCOME	20%	25%	-5%
MULTI-ASSET	22%	20%	+2%
PRIVATE EQUITY	11%	10%	+1%
REAL ESTATE	5%	5%	0%



INVESTMENT PERFORMANCE

The investment objective of the endowment is to preserve and grow purchasing power over time. To accomplish this goal, the endowment must generate investment returns in excess of spending and inflation. We recognize that this objective can be difficult to obtain in any given one-year period. Accordingly, the investment performance is generally evaluated over five-year rolling periods. The asset allocation policy, governed by the Investment Committee of the Board of Trustees, sets forth strategic policy targets to best meet this investment objective.

OVER THE LONGER TERM, THE PORTFOLIO HAS PRODUCED RETURNS IN EXCESS OF ITS POLICY BENCHMARK WHILE MEETING ITS OVERALL OBJECTIVE.

"Your endowment has helped ameliorate the burden of financing my medical education, and I only hope this message can convey to you my immense gratitude for your support and kindness. Thank you!"

— Maryam Altmirah,
Goldberg Family Endowed Scholarship for
Rush Medical College, Graduating RMC 5/2/17

Leverage Existing Tools to Enhance Engagement



“The mentoring program has been an outstanding platform for advancing my career, particularly when it comes to improving my grant writing skills, developing great collaborations, and participating in professional and research development activities. Thank you, RRMP!”

Jitesh Pratap, PhD
Assistant Professor
Department of Anatomy and Cell Biology

“The mentorship program at Rush provides a rich network of expertise and experience, creating a more inclusive and collaborative environment. This is necessary for the growth of mentees and mentors alike, especially in the current environment where strong multidisciplinary collaboration is paramount for success.”

Anne-Marie Malfait, MD, PhD
Associate Professor
Department of Internal Medicine and Biochemistry



Mentee Outcomes AND COLLABORATIONS

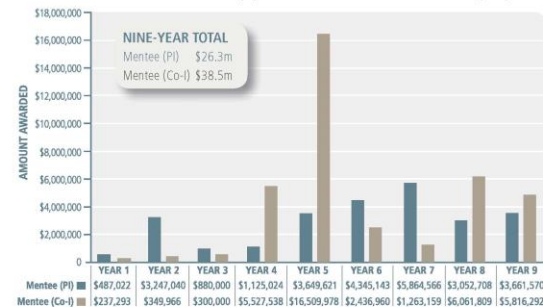
The primary objective of RRMP is to aid junior faculty to establish independent, funded research careers. In fiscal year 2015, 35 of the funded mentees participated in grant writing, either as the principle or co-investigator. In year one of the program, mentees either received or participated in grants that brought close to \$700,000. In year nine, the amount increased to approximately \$9.5 million.

In fiscal year 2015, 32 of the 90 grants awarded (36 percent) were National Institutes of Health (NIH) awards. Mentees published 223 manuscripts and presented 193 abstracts and posters.

Total OF GRANTS AWARDED

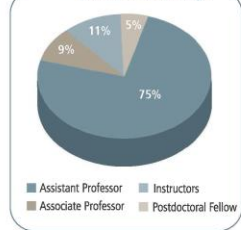
In the past nine years combined, mentees as principal investigators secured more than \$26 million in awards. Mentees as co-investigators with their mentors or collaborators brought close to \$39 million, totaling \$65 million.

Grants Awarded to Mentees as (PI) and in Collaboration with Mentors as (Co-I)

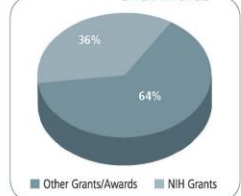


	YEAR 8		YEAR 9	
Non-federal PI	\$949,089	Federal PI \$2,603,487	Non-federal PI \$2,064,346	Federal PI \$1,597,224
Non-federal Co-I	\$1,892,851	Federal Co-I \$3,669,090	Non-federal Co-I \$1,522,184	Federal Co-I \$4,294,108
Total non-federal	\$2,841,940	Total federal \$6,272,577	Total non-federal \$3,586,530	Total federal \$5,891,332
	TOTAL \$9,114,517		TOTAL \$9,477,862	

Mentee Rankings



Funded Grants and Awards



Create Donor Experiences of Authentic Gratitude

- Meet and Greets
- [Scholarship Luncheon](#)
- Off Campus Gatherings

Develop Creative and Relevant Recognition

- **Best practices**
- **Stewardship Trends**
 - What works for one won't work for all
 - Know what's meaningful and relevant to your donor

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News for Donors and Friends of Rush University Medical Center | SUMMER 2014

THANKS TO OUR DONORS

Swimming Past a Milestone



Faye and Joshua Jacobs, MD, celebrate after Faye completed the 2015 Swim Across America Chicago Open Water swim.

Hundreds came together at Ohio Street Beach to support cancer research at Rush at the Swim Across America Chicago Open Water Swim on Saturday, July 25.

More than 230 individual fundraisers and swimmers, along with 25 teams, together raised around \$365,000 through the event, though total donations are still being tallied.

Swim Across America is a national organization that raises money nationwide through swimming events in support of local cancer research facilities. Since 2012 Swim Across America has directed its proceeds to the Rush University Cancer Center, leading to more than \$1 million in total contributions to clinical cancer research at Rush over the last four events.

Read more online at www.rush.edu/news/swims-raise-more-1-million.



Making Waves
TO FIGHT CANCER

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SPRING 2016

Rush Takes Health Care Mission
Around the World
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New Leads in the Mystery of
Alzheimer's Disease
PAGE 5

RUSH

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David McClellan experienced cancer's wide reach firsthand when he lost his stepfather to the disease.

"It's not a question of if people have been touched by cancer in their lives, it's when," McClellan said.

Eager to make a difference, McClellan joined Swim Across America, a national organization that raises money for cancer research through swimming events. Money raised by the swimmers goes to a cancer research center in the same community where the events take place.

Since 2012, Swim Across America Chicago has supported Rush University Medical Center, contributing \$215,000 toward clinical cancer research in 2012, followed by \$325,000 in 2013.

"We've done a great job growing it in the last couple of years, but there's a lot more to do," said McClellan, Swim Across America Chicago Event Director. "Every \$100,000 we raise could fund one or two distinct early-stage research projects."

Infectious enthusiasm for both the event and the philanthropic opportunity inspired a team of employees and staff from Rush to raise money and participate in the 2012 and 2013 swims at Ohio Street Beach.

Grateful patients are also among the participants, including Catherine Gray, who is active on the Chicago Committee for Swim Across America. After about 18 months of severe pain, she came to Rush for a second opinion and underwent successful hip replacement surgery in 2009. Gray has swum at the event for the last 18 years straight, and her treatment at Rush helped her to continue swimming without pain.

"It changed my life, and I'm as active as I ever was," Gray said. "The care you receive as a patient at Rush is extraordinary. It's different from other hospitals. It's really easy to become passionate about Rush."

To register for the Chicago swim on July 26, join the Rush team or donate to a swimmer who inspires you, go to www.swimacrossamerica.org/chicago.

www.rush.edu/giving 1

Inside Health – Weekly Health News and Information

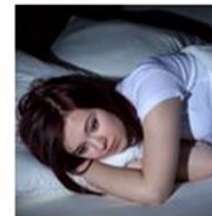
RUSH UNIVERSITY
MEDICAL CENTER



Real Emergency or False Alarm?

A sudden change in health can be due to a minor ailment or a serious problem. A guide compares symptoms to tell you when you may need immediate care.

[Learn More >](#)



Insomnia Treatment Without Drugs, Even for the Sick

Sleep researchers have found that cognitive therapy can alleviate insomnia in patients with psychiatric and medical conditions.

[Learn More >](#)



Patient Inspires Swimmers for Cancer Research

Her long battle with cancer is motivating caregivers to take part in the Swim Across America fundraiser in Chicago on July 25.

[Learn More >](#)

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You're invited to join Rush University Medical Center and Swim Across America for

A Kickoff Party to Celebrate the 2015 Swim Across America Chicago Swim Thursday, June 18, 2015

RSVP ONLINE TODAY

Join us for a swim kickoff party on Thursday, June 18, at Jefferson Tap & Grille as we celebrate the partnership between Rush and Swim Across America and honor the Swim Across America Chicago Swim participants for their commitment in the fight against cancer.

Meet fellow swimmers and get to know Rush physicians and researchers who are using funds raised by Swim Across America to better treat and fight cancer.

INSPIRING SWIMMERS FROM THE SHORE
Cancer patient supports research fundraising swim

By Ben Feldman

Emily Crabtree won't let anything stop her from participating in the annual Swim Across America Chicago fundraiser for cancer research — even her own continuing fight against the disease.

Crabtree, 32, has been battling cancer for 13 years, during which she has undergone more than 18 months of chemotherapy, 35 months of radiation treatment and multiple surgeries to clear the disease from her body. She now is going through chemo again to ward off nodules that appeared in her left lung about four years ago, which is why she wasn't able to swim at last year's event.

But she still gathered donations and encouraged others to participate in the Chicago swim, including many of her caregivers at Rush. She won't be swimming at this year's event, as her treatment continues, but she is still supporting the effort just as she did last year. "It's a celebration," Crabtree says of the Swim Across America Chicago Open Water Swim. "It's incredibly special to see all these patients and my doctors and nurses come out to the event and support this effort."

'Very personal and important'

Swim Across America is a national nonprofit organization that raises money for cancer research through swimming events. Money raised by the swimmers goes to a cancer research center in the same community where the events take place.

Since 2012, Swim Across America Chicago has raised \$825,000 for research at the Rush University Cancer Center. Rush again will be the recipient of proceeds raised at this year's event on Saturday, July 25, at Ohio Street Beach.

"I have been to lots of different fundraising events, but to see something where Rush directly benefits is very personal and important to me," says Crabtree, who's been receiving care at Rush since the beginning of her long fight with cancer.

Rush staff, as well as current and former patients and supporters — many of whom were inspired by Crabtree's enthusiasm — raised money and participated in the last three Chicago swims. The swimmers in Crabtree's care team include Patricia Papanikolaou, MD, MPH, clinical coordinator of Midwestern Outcomes at Rush's oncologic oncology program, hematologist oncologist Allen Korenblit, MD, and radiation oncologist Andrew Walker, MD, who is co-captain of this year's Rush team. Both Korenblit and Walker swam at last year's event in Crabtree's honor.

"I've had people in my family affected by cancer," Walker says. "Certainly every day I see the struggles our patients go through, from diagnosis through treatment, surveillance, follow-up and, unfortunately, through recurrence. It drives all of us to push for more fundraising and research."

Motivating others

While Walker was honored to swim for Crabtree, he finds it sobering that she was not able to be in the water with the people she encouraged to participate.

"It always stings when you have a patient who doesn't have the continued outcome that you were all hoping for," Walker says. "It was particularly the case with Emily, because she really has fit the bill to get Rush people heavily involved and working on donations and getting more participants. It's kind of like we swam without our team captain, but she was there cheering us on from the shore."

Crabtree sees her own continued experience fighting cancer as an opportunity to get even more people involved with Swim Across America.

"If they see someone like me who's a patient who's out there taking part in the event and getting their friends and family involved, then I feel like I can motivate doctors and nurses to do the same," Crabtree said. "You don't necessarily have to be a swimmer to do the event. You can still fundraise, volunteer, or just come out and be a part of it."

Learn more about the Swim Across America Chicago Open Water Swim on July 25.

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Fighting Cancer as a Team

"Because of Swim Across America, I have seen my doctors and nurses raising money on their own time for cancer research that could help me." — Emily Crabtree, Rush cancer patient and Swim Across America fundraiser

Nothing stops Emily Crabtree from participating in Swim Across America — Chicago — not even her own ongoing fight against cancer. Now 52 years old, Crabtree has been in cancer treatment for 18 years, most recently in chemotherapy at Rush's ward off modules in her left lung. But her enthusiasm and unwavering commitment for Swim Across America — Chicago, an annual swimming event that raises money for cancer research at Rush, has inspired an ever-growing group of participants — including her own health care professionals. Crabtree and radiation oncologist Andrew Walker, MD, combined their efforts to recruit participants and fundraisers, fostering an energetic investment within Rush that builds every year.

More than \$1 million has been raised since 2012, when Swim Across America chose Rush as the beneficiary of its support for research into promising and transformative methods to treat the disease. The funding has given innovative and singular approaches to cancer treatment and prevention a necessary boost, leading to further support from the National Institutes of Health, a key to taking potential breakthroughs from the lab to the bedside.

Swimming for Cancer Research

Swim Across America is a national nonprofit organization that raises money for cancer research through swimming events, such as the Chicago Open Swim with Rush. Money raised by the swimmers goes to a cancer research center in the same community where the events take place.

Learn more about the 2019 event, and how the partnership with SAA raised more than [\\$1 million for cancer research at Rush](#).



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SWIM
ACROSS AMERICA
★ MAKING WAVES TO FIGHT CANCER ★



David McClellan

Swim Across America

David McClellan is a financial advisor and planner in Chicago affiliated with Forum Financial Management. He first became involved with Swim Across America in 2010, after learning that his step-father was diagnosed with terminal renal cell cancer. He acted as the volunteer Event Director for Chicago from 2012-2014, growing donations by 89% in his first year and leading the inaugural Swim Across Lake Michigan event in 2013. He has personally raised more than \$53,000 for SAA through his swims.

David was a founding parent of Urban Prairie Waldorf School in Chicago, where he serves on the board of trustees and runs the finance committee. He serves as a mentor for entrepreneurs at the 1871 incubator in Chicago. He has served on the board of the Alliance for the Great Lakes. David resides in Chicago's South Loop with his wife, two children and Labrador retriever.



SAA CHICAGO – RUSH PARTNERSHIP

All Chicago proceeds benefit cancer research at Rush University Medical Center, a leading center for clinical research and home to some of the nation's top cancer experts.

Four-Year Impact

- \$1,125,000 Donated by SAA to Rush
- Payout Rate > 80%
- Nearly 100 Research Proposals Submitted by Rush Staff
- 13 “Best Ideas” Awarded SAA Funding

Advice for Working with Donors

- **Transparency**

- Especially around the donor's impact on your mission

- **Access**

- Bring your organizations resources to bear

- **Relationships**

- The people may change, so work proactively to develop relationships that enable you to build on prior efforts

Questions?

