MAHARISHI UNIVERSITY OF MANAGEMENT

February 2, 2012 Board of Trustees Meeting

Supplementary Materials

Graham Pelton Report (15 pp)

Bill Goldstein: International Expansion Supplement (6 pp)

Campaign for MUM

• Campaign Progress to Date
• Role of Trustee in a Campaign
• How to Get Involved
• Partnerships in Regions
# MUM Campaign Progress to Date

<table>
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<tr>
<th>Gift Level</th>
<th># of Donors Needed</th>
<th>Providing</th>
<th>Cumulative Total</th>
<th># of Gifts Rec’d</th>
<th>Total in Gifts Received</th>
<th># of Bequest Donors</th>
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<td>Below $5,000</td>
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<td><strong>TOTALS</strong></td>
<td>162 +</td>
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</table>

*Note: Total number of solicitations: 50+; total number of pending: 6 with a value of $2,775,000*
Everyone in the organization understands that philanthropy and fund development are critical to the organization AND that each individual has a role in the process.

- Need for capital funding / endowment growth
- Increase effectiveness of an organization’s mission
- Demonstrate charitable purpose
- Year-to-year support to sustain the organization (annual fund)
Because Maharishi University of Management is important to you and you are financially committed to it, you will be able to make a strong and persuasive case that others will respond to.

* Asking is the easy part – getting the prospect ready to give is the hard part. *
Any fundraising endeavor for an organization is a collective commitment that must be fulfilled individually.

That commitment and fulfillment must begin with the Board of Trustees.
Board Roles and Responsibilities

- Communicates the mission of the University and the vision of the leadership
- Identifies, nominates, and recruits qualified candidates for Board membership
- Supports the University with time, talent, and annual/campaign philanthropy
- Builds the prospective donor pool and participates in campaign initiatives
- Oversees the Campaign (policy focus)
- Makes fundraising and the campaign an organizational priority and shows a demonstrative commitment
- Considers stepping forward as fundraising leaders
- Commits to 100 percent Board participation
Typically, the Board of Trustees of an organization should be responsible for approximately 30-40 percent of any fundraising goal.  

30-40 percent is composed of “giving” and “getting”.  

Emphasis is on equal commitment, not equal gifts.  

MUM’s Board Participation in the campaign (to date):

- # of Trustees: 35
- # of Trustee donors: 19 (additional 3 with bequest intentions)
- # of Trustee solicitations pending: 3
- # of Trustees outstanding: 10
- % of participation to date: 54% (63% including bequests)
- Total in gifts/pledges: $2,981,508 (19 donors)
- Average gift: $156,921
Fundraising Cycle

Identification

Cultivation (Build Relationships)

Stewardship (Thank the Donor and Keep Engaged)

Solicitation (Ask for a Gift)
MUM Potential Prospective Donors/Leaders

• Individuals
  – Alumni
  – Fairfield community
  – Regional leaders
  – Corporate leaders
  – Healthcare leaders and practitioners
  – TM community
  – International figures
  – Entertainment figures

• Corporations
  – Leaders/employees practicing TM
  – Those aligned with MUM core values and priorities

• Foundations
  – Family foundations
  – Those aligned with MUM core values and priorities

• Government-related entities
How Board Members Can Help

• Know and practice the elevator speech
• Make an early and “stretch” gift
• Identify prospective donors
• Provide “intelligence” about donors and prospects
• Participate in cultivation meetings
• Host an event
• Open doors for solicitations
• Participate on a solicitation team in a face-to-face meeting
• Be a MUM steward – personally thank donors
<table>
<thead>
<tr>
<th>Executive Briefing</th>
<th>Site-Visit</th>
<th>School Events</th>
<th>Fairfield/Regions</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Conducted by President/ Campaign Chair/Board member/ Institutional Advancement staff</td>
<td>✓ Tour of facilities and lunch with President/ Campaign Chair/ Board Member/ Institutional Advancement staff</td>
<td>✓ Ensure that prospects are aware of MUM’s upcoming events</td>
<td>✓ Identify core group of prospective donors</td>
</tr>
<tr>
<td>✓ Acknowledge previous gift(s)</td>
<td>✓ Meet and interact with students and faculty</td>
<td>✓ Extend invitation to events</td>
<td>✓ Decide cultivation plan: briefing meeting, small gatherings/ dinners, coordination with a visit from MUM leadership (Dr. Morris, Dr. Hagelin, Trustees, etc.)</td>
</tr>
<tr>
<td>✓ Stewardship update</td>
<td>✓ Review campaign funding objectives</td>
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</tbody>
</table>
MUM Campaign – Partnership in Regions

Fairfield – Ed Malloy*, Dr. Bevan Morris*, Dr. John Hagelin*, Fred Gratzon

New York – Ramani Ayer, Bob Brown

Washington, DC – Jeffrey Abramson

Southeast – Bob Brown, Scott Brown (staff)

Midwest – Tom Stanley, Bud Liebler, Josie Fauerso

Northern CA – Larry Chroman

Southern CA – David Todt (staff)

Northwest – Vincent and Maggie Argiro

Europe – Dr. Bevan Morris

* Note: Ed Malloy, Dr. Morris, and Dr. Hagelin continue to travel throughout the US to meet with constituents and prospective donors on behalf of MUM
Next Steps

1. Identify top 5+ prospective donors
2. Review list with Nick Rosania to coordinate cultivation plans; understand history with MUM
3. Develop cultivation strategy for each; partner with MUM’s advancement office
4. Move forward with scheduling cultivation meetings and activities
5. Report back to Nick to document activities – “moves management”
6. Develop follow-up plan and next steps toward a solicitation (there could be a few “touches” prior to solicitation)

*By March 15, progress on “next steps” to be reported back to Nick Rosania*
“Money is not given, it has to be raised. Money is not offered, it has to be asked for. Money does not come in, it must be ‘gone after’.”

- Author Unknown

“Never think you need to apologize for asking someone to give to a worthy cause, any more than as though you were giving him an opportunity to participate in a high grade investment.”

- John D. Rockefeller, Jr.
1. Late Breaking News Not in Trustee Report

INDIA — On my last day abroad at the request of Raja Dillbeck, I visited the Dean of the School of Biological Sciences at the private and successful Apeejay Stya University in Delhi, Dr. Asha Chandola.

Dr. Chandola, a member of the Indian Academy of Sciences, has met with Rajas Dillbeck and Fagan and was so impressed with the quality of their research that she has been looking for ways to collaborate with MUM. In her years at Haryana University in Srinigar she had spent hours watching the Maharishi Channel and was captivated by the knowledge presented there and wishes to integrate the Vedic knowledge into the current disciplines.

In discussing the best form of a collaboration, I suggested a joint program for the study and research of the connections of the Veda and Vedic literature and the Human Physiology as expounded by Maharaja-ji in his past book and in his most recent Ramayana book.

The College of Biological Sciences has the most modern biological research equipment which I would think could verify correlations developed by Maharaja-ji and we have the knowledge to make this study worthwhile. She was most excited by this idea. Perhaps Maharaja-ji would even consider taking a direct interest in developing the areas of study and research in this proposed dual degree program.
II. Project Yield Summary

The trip described in the Trustee Report and Supplement above has yielded the following project opportunities:

India

Maharishi Vidya Mandir

- We expect to receive applications in the Spring from MVM students when they complete their National entrance exams. We hope to start with a group of 5-10 such students attending MUM and/or Maharishi School of the Age of Enlightenment.
- Development Costs: 0- $4,000. Possible return trip to interview and admit prospects in Spring.

Apeejay Stya University

- Veda and Physiology dual-degree program.
- Creation of dual-degree program with ASU.
- Development Costs: $20,000 (personnel costs, and site visit) for creation of curriculum. Shared tuition from programs could generate cash flow in as soon as one year from completion of curriculum design.

Brahmasthan Study

- Dr Girish Chandra Varma-ji and His Excellency Raja Harris are very interested in offering several month- or semester study programs for our students in the Brahmasthan. We are discussing the coordination of faculty from Fairfield and specialized Indian faculty for this program. Girish-ji has indicated that special, new areas of knowledge had been authorized by Maharishi to be offered which may include Jyotish study. Preliminary costing of $40 per day for room and board have been offered us, and/or the possibility of renting a building on a long term lease once a new third building is complete is also being discussed.
- Development Costs: $0
Mongolia

Ikh Zasag International University

- Seven MOU’s were entered into with Mongolian Universities, the most promising being with Ikh Zasag International University. We would propose sending Professor Heaton in March or April to teach sustainable business classes to the MBA students at their Royal Academy and to train faculty in CBE and prepare for fall offerings in Computer Science and Business as part of a blended learning degree program. Other University’s programs will be discussed at that time.
- Development Costs: 0-$2,000. Trip to Mongolia for one faculty in Spring. Initial tuition cash flow possible this Spring with more substantial revenues expected in Fall.

Bhutan

Sustainable Schoolhouse

- Professor Gamble is working on prototype designs with counterpart Chief Engineer and may continue project as student exercise. Engineer may come here in next month for further training and consultation. Site visit in June is planned to commence construction of solar plant on Alpine site and begin construction of first building which may include selected MUM student interns.
- Development Costs: 0-$2,000. Workshops may be offered to local engineers to defray faculty visit costs. Student costs to be self sustaining with surplus possible. Other costs, including all construction, covered by Kingdom of Bhutan.

Gross National Happiness Center Camp

- Summer camp in June-July at Boomthang, site of proposed GNH Center with MUM and Bhutanese students, with possible offering to other US
Supplemental Report / Bill Goldstein

Colleges, e.g., Depauw University. Student charges to defray all MUM faculty costs.
  o Development Costs: 0-$1,000

Bhutan Study Abroad Program

  o Semester abroad program at Royal Thimphu College commencing in Fall or Spring. 20 student enrollment initially proposed, 10 from MUM, others from developed affiliate colleges, e.g., Grinnell, Depauw, as first stage of Bhutan Study Abroad Consortium to be centered at MUM.
  o Development Costs: $15,000. Start up hire of Consortium Director will require initial funding till self sustaining in Fall or Spring. $100,000 positive net cash flow expected with first entry.

Organic Agriculture Internship

  o Student and graduate posting at resort gardens and workshops.

SAARC Grant

  o Grant proposal for 5-7M USD for three-country project on Vedic organic agriculture, sustainable schoolhouse, or CBE. University as PI would receive at least 3% of grant for G&A.
  o Development Cost: Grant Writer, $5,000. Grant review is on 3-6 month cycle with 90% approval rate.

Future Target Countries

In the next three years after stabilizing the above program developments, countries of interest include Russia, Korea, Japan and Vietnam.
III. Organizational Structure

To systematically and continually capture and exploit international expansion opportunities such as above, we propose a permanent office of program development. This need not be limited to international projects, but could include domestic ones, including expansion of degree programs, e.g., Masters programs in Sustainable Living and Digital Media, ESL, Business Incubator and identification and analysis of new expansion areas. It would serve as a clearinghouse for all expansion initiatives to assure they are consistent with our strategic priorities, growth targets, and budgetary planning.

The common start-up funding mechanism, when and if required, would not be through general operations revenue but restricted donations or loans or its own operating surplus. A formula for reimbursing the office through surplus generated by its efforts should ensure its sustainability. Its priority would be the diversified development of short and long term program revenue through student tuition enhancement in diversified markets and program structures, e.g. blended learning, study abroad and DE, to be offered in numerous foreign sites and degree programs.

Program Development Office Staffing

- **Director – Half Time.** Responsibilities: Developing and implementing strategic international development plan. Site visits, conducting of key meetings and drafting of MOU’s and other requisite agreements. Supervising program implementation.
- **Grant Officer:** Research and drafting of public and private grant proposals. One quarter time. $10,000
- **Study Abroad Consortium Director:** Half time. Set up and direct Bhutan Study Abroad program, and internship programs. $20,000 and/or performance based compensation.
- **Office Staff:** Administrative and clerical, one third time ($12,500).
- Some positions could be combined in one person.
Proposal for Interim Implementation

The proposed projects funding requirements from March through August 2012 in sequence are as follows:

1) March 2012: Dr. Heatons Mongolia visit (up to $2,000 for travel),
2) March: Bhutan Semester Study Abroad Office start up ($20,000), to be sustained thru student revenues;
3) April: ASU dual degree curriculum creation ($20,000 spread over one year);
4) April: 5M SAARC grant preparation ($10,000) spread over 6 months
5) *May: Vidya Mandir revisit ($4,000), if prospects appear viable;
6) June: Bhutan Sustainable Schoolhouse, to be funded thru student summer program revenues ($2,000);
7) June: Bhutan GNH summer camp, to be funded thru student summer program revenues ($2,000);

*Item 5 is proposed to be paid thru Admissions existing recruiting budget.

Other expenditures for the period, totaling from $31,000-$56,000 would be paid from new summer and study abroad program revenues. Any required upfront cash needs, which would largely fund ASU Ved and Physiology dual degree curriculum and SAARC grant preparation, would be funded till sustainability is achieved through restricted donations for Bhutan/India/Mongolia expansion and/or intra-institutional loans. Surplus from interim projects after loan repayment would then first be reinvested in Program Development Office to establish permanent staffing and fund future development costs.
The 15 Most Popular Colleges —
US News List

From an article in the Huffington Post on January 25, 2012

Life is not a popularity contest. However, sometimes, popularity can be a good metric with which to look at colleges.

*US News and World Report* recently named the most popular colleges. Harvard topped the list with Brigham Young University coming in second.

But how do you measure popularity, you ask?

The *Report* has more:

One of the best indicators of a school's popularity among students is the school's yield — the percentage of applicants accepted by a college who end up enrolling at that institution in the fall. The figures in these tables are from the fall 2010 entering class and show the students that were accepted, the students that enrolled, and the admit yield.

<p>| Maharishi University of Management | 79% |
| Harvard                              | 75% |
| Brigham Young University             | 75% |
| Stanford                             | 71% |
| Yeshiva University                   | 70% |
| University of Alaska – Fairbanks     | 70% |
| University of Nebraska               | 67% |
| Georgia Southern                     | 66% |
| Yale                                 | 66% |
| MIT                                  | 64% |
| University of Pennsylvania           | 63% |
| University of North Dakota           | 62% |
| University of Nevada Las Vegas       | 60% |
| Princeton                            | 57% |
| Florida A&amp;M                          | 56% |
| Columbia                             | 56% |</p>
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