Development & Alumni Affairs 2021 Strategic Plan

Revised August 13, 2013

Development & Alumni Affairs Purpose:

Our purpose is to generate maximum gift support for CALS based on the dean's priorities through donor-driven fundraising.

Development & Alumni Affairs 2021 Vision:

We will engage alumni, friends, corporations, and private foundations to create passion for CALS people and programs resulting in philanthropic support.

Development & Alumni Affairs Mission:

Create opportunities for meaningful engagement of CALS alumni and friends that results in world-class students, faculty and facilities.

Development & Alumni Affairs Shared Values:

Internal values:

Excellence
Integrity
Teamwork
Strong work ethic
Clear communication
Customer service
Productivity
Fun

External values:

Build trust with our prospects
Earn respect
Follow through on our commitments
Treat all ethically
STRATEGIC GOAL ONE

Double gift revenue for CALS by 2021

A. Current situation and gap between current situation and desired situation:

- Gifts were $2.3 million in 2002 with one Development Officer (DO)
- CALS gift total average last three years = $8 million with 3 DO’s
- Gap: Development officers have other responsibilities which limit their focus
- Gap: Little support staff for development officers

B. Strategies to achieve goal:

1. Hire/retain the best paid/most productive development and alumni professionals
2. Increase the number of development professionals and add support people
3. Create a culture of faculty supporting development for their own areas
4. Focus on high capacity alumni prospects in Arizona and California/rest of U.S./and globally
5. Work to create new corporate partnerships for centers of excellence (agricultural/retail/bio-tech, etc.)
6. Continue to support a fully-funded, comprehensive Annual Giving program administered by the UAF.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Time Period (Fiscal Years)</th>
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</thead>
<tbody>
<tr>
<td>1. Develop a hiring plan for new people:</td>
<td>FY 2013</td>
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<tr>
<td>-Director of Development/Corporate Partnerships</td>
<td>2014/2015</td>
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<tr>
<td>-Development support specialist</td>
<td>2014/2015</td>
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<tr>
<td>-California DO</td>
<td>2014/2015</td>
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<tr>
<td>-National/International DO</td>
<td>2018</td>
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<tr>
<td>-Stewardship DO</td>
<td>2019</td>
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<td>2. Support development of CALS branding/marketing materials/YouTube videos, etc.</td>
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<td>3. Take CALS new branding/communications materials face-to-face with our out of state prospects</td>
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C. Inputs needed to achieve the goal (do not limit to financial inputs):

- UAF financial support for salaries and travel
- University development office/college salary support
- Commitment of dedicated time from faculty and Dean for development
- Research support to identify prospects

D. Objective Metrics that will be used to track progress towards attaining goal:

10%-20% increase each year
2021 gifts exceed $20+ million
STRATEGIC GOAL TWO:

Develop new strategies to engage a broader base of alumni starting with first year CALS students

A. Current situation and gap between current situation and desired situation:

There are limited opportunities for alumni to engage with CALS in an easily accessible way. Current opportunities include, but are not limited to:

- UAF Board membership (invitation only & board approval required)
- UA AA Board membership (invitation only & board approval required)
- CALS Alumni Council membership (invitation only & board approval required)
- Unit level advisory boards (i.e. SNRE, AREC, Norton, AGR House) (invitation required)
- Ambassador involvement (invite)
- Guest lecture (invite)
- Ag 100 membership (open)
- Burrito Breakfast (open)
- Compendium (open)

B. Strategies to achieve goal:

1. Update the CALS Alumni Council By-laws and structure to engage more alumni and empower members
2. Redirect CALS Alumni Council resources (time, talent & treasure) to create new events/methods that engage more students and significantly broaden our alumni support base
3. Work with faculty to instill a philanthropic mindset in our students for CALS from the first day of class
4. Establish a relationship with key faculty to connect alumni including developing a CALS Alumni “Speakers Bureau” with CALS Academic Services for classes and helping to involve key alumni prospects for the new faculty tour
5. Support the expansion of the Heritage & Traditions class to reach more students and alumni via on-line distance learning, homecoming, etc.
6. Involve alumni and their companies and networks in the creation of internships, student tours, networking events, etc.

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<tr>
<td>1. Redirect alumni council with new purpose</td>
<td>FY’14/15</td>
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<td>2. Collaborate with CAS and Student Affairs to reach current students through events</td>
<td>FY’13/14</td>
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<td>3. Attend faculty staff meetings to facilitate new philanthropic mindsets</td>
<td>FY’13/14</td>
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<td>4. Work closely with Alumni Council and Development to assist with alumni connections</td>
<td>FY’13/14</td>
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<td>5. Create annual fall welcome event hosted by Alumni Council for new students</td>
<td>FY’13</td>
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<td>6. Create annual spring senior send-off hosted by AC for graduating Seniors</td>
<td>FY’13</td>
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<tr>
<td>7. Expand the reach of Heritage &amp; Tradition class to reach more alumni</td>
<td>FY’15</td>
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C. Inputs needed to achieve the goal (do not limit to financial inputs):

-Time of AC members to invest in new events
-Time of CAS staff to work with students and AC reps to coordinate events
-Time of development officers to identify, cultivate and solicit gifts for H&T Chair

D. Objective Metrics that will be used to track progress towards attaining goal:

- Number of active alumni annually
- Improvement in % of alumni who give back from 4.88%
- Faculty/staff participation level compared to other UA academic units
STRATEGIC GOAL THREE:

Capitalize on the aging alumni/friend population

A. Current situation and gap between current situation and desired situation:
   - For the past three years, estate gifts have accounted for 10% of CALS gifts annually ($2.36M total)
   - Current number of CALS alumni 60 years+ is 6,050 (26% of total)
   - In 2021, number of CALS alumni 60 years+ will be 11,419 (89% increase)
   - Prospects age 60 years and older are prime prospects and often have reduced financial obligations

B. Strategies to achieve goal:
   1. Target prospects age 50 to 70 years. Engage them with the college and educate them on giving opportunities to secure major gifts, including planned gifts.

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<tr>
<td>1. Incorporate planned giving into marketing &amp; communications for CALS</td>
<td>FY ’14</td>
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<td>2. Build target CALS list over 75</td>
<td>FY ’14</td>
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<td>3. DOs utilize and incorporate specific tools from UAF Gift Planning</td>
<td>FY ’14</td>
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<td>4. Presentations to educate &amp; identify likely prospects</td>
<td>FY ’14</td>
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<td>5. Do some mailing tests of some customized CALS brochures/mailings</td>
<td>FY ’14</td>
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<td>6. Outreach to women and families (as patriarchs die)</td>
<td>FY ’15</td>
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<td>7. Hire specific Planned Giving DO</td>
<td>FY ’16</td>
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C. Inputs needed to achieve goal:
   - Funds for prospect events and marketing communications
   - Cooperation and time from UAF Office of Gift Planning
   - Funds from UAF to split fund CALS Planned Giving DO

D. Objective Metrics to track progress
   - Track increase in number of assigned prospects aged 60 and over
   - Track number of planned giving proposals
   - Track number and value of committed planned gifts
STRATEGIC GOAL FOUR:

Increase development officer productivity by 20-30%

A. Current situation and gap between current situation and desired situation:

- Approx. 20% of DO time dedicated to reporting, administration and non-fundraising duties
- Allow DOs to dedicate 90-100% of time to major gift development

B. Strategies to achieve goal:

1. Work “smarter” to maximize results
2. Get additional administrative support to free up time for prospect visits, stewardship, etc.

Actions

All actions will be implemented in FY ’13/’14 and ongoing throughout:

1. Identify current DO tasks to delegate or disregard
2. Leverage existing friends/natural partners to increase success booking appointments & securing gifts
3. Delegate some administrative tasks to support personnel
4. More joint asks with other units
5. Identify and maximize use of available resources at UA Foundation (ex., GIFT Center, Donor Services, Scholarship administration, marketing communications, etc.)
6. More Administrative support
   a. Scholarship stewardship research and management
   b. Assemble info & materials for prospect visits
   c. Help identifying and booking “cold call” appointments
   d. Travel arrangements and reservations
   e. Actively assist with website updates, newsletter writing & production and constituent meeting planning.
7. Maximize current technology to be more productive

8. Inputs needed to achieve goal:

Ongoing DO professional development
Funding for I-Pad video and other presentation tools
Additional administrative support staff

9. Objective Metrics to track progress:

Compare UAF productivity metrics (number of personal visits, proposals, etc.) and dollars raised to prior years