

DEVELOPMENT & ALUMNI AFFAIRS 2021 STRATEGIC PLAN

Revised January 5, 2016

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

Increase gift revenue for CALS by 2021

A. Current situation and gap between current and desired:

We want to be bringing in \$15M/year on average

- Gap: Development officers have other responsibilities which limit their focus
- Gap: Need more administrative support for development and prospect research

B. Strategies to achieve goal:

1. Hire/retain the best paid/most productive development and alumni professionals
2. Add administrative and research support
3. Enlist the aid of faculty to create and implement development plans for departments/centers/schools
4. Focus on high capacity alumni prospects in Arizona/California/national/international
5. Support the alumni pipeline to bring more generations into the culture of philanthropy
6. Add information regarding planned giving to our repertoire when talking with donors
7. Exploit more relationships between faculty and business entities to create new corporate partnerships for centers of excellence
8. Support the comprehensive Annual Giving program administered by UAF
9. Better marketing packages for vet med/career center – include video
10. Travel more/development officers spend less time in the office, and more on visits with donors and prospective donors

Actions

Time Period (Fiscal Years)

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| 1. Develop a hiring plan for new development professionals: | FY 16 |
| a. Vet Med Surgical Program | FY 16 |
| b. Development Coordinator, Major Gifts | FY 17 |
| c. Internal faculty support liaison | FY 18 |
| 2. Support development of CALS branding/marketing materials/YouTube videos, etc. | |
| 3. Take CALS new branding/communications materials face-to-face with our out of state prospects | |
| 4. Current development officers to become better versed at talking to donors about planned giving – attend professional development sessions on planned giving | |
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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 \$15 million

STRATEGIC GOAL TWO:

Develop new strategies to engage a broader base of alumni and friends 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.

Actions

Time Period (Fiscal Years)

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| 1. Redirect alumni council with new purpose | FY'14/15 |
| 2. Collaborate with CAS and Student Affairs to reach current students through events | FY' 13/14 |
| 3. Attend faculty staff meetings to facilitate new philanthropic mindsets | FY' 13/14 |
| 4. Work closely with Alumni Council and Development to assist with alumni connections | FY' 13/14 |
| 5. Create annual fall welcome event hosted by Alumni Council for new students | FY '13 |
| 6. Create annual spring senior send-off hosted by AC for graduating Seniors | FY '13 |
| 7. Expand the reach of Heritage & Tradition class to reach more alumni | FY '15 |
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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.
2. Utilize Statement of Future Gift Intention Form to receive firm bequest commitments from donors.

Actions

Time Period (Fiscal Years)

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| 1. Incorporate planned giving into marketing & communications for CALS | FY '15 |
| 2. Build target CALS list over 75 | FY '15 |
| 3. DOs utilize and incorporate specific tools from UAF Gift Planning | FY '15 |
| 4. Presentations to educate & identify likely prospects | FY '15 |
| 5. Do some mail tests of some customized CALS brochures/mailings | FY '15 |
| 6. Outreach to women and families (as patriarchs die) | FY '15 |
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C. Inputs needed to achieve goal:

- Funds for prospect events and marketing communications
- Support 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
3. Utilize Program Coordinator for donor research and pre-travel coordination to minimize time required by Development Officers in the office.

Actions

All actions will be implemented in FY '15/'16 and ongoing throughout:

1. Identify current DO tasks to delegate or disregard (critical vs. important)
 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. Prospect research
 - b. Scholarship stewardship research and management
 - c. Assemble info & materials for prospect visits
 - d. Help identifying and booking "cold call" appointments
 - e. Travel arrangements and reservations
 - f. Actively assist with website updates, newsletter writing & production and constituent meeting planning.
 7. Maximize current technology to be more productive
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7. Inputs needed to achieve goal:

Event support from other departments such as the Dean's Office
Ongoing DO professional development
Provide Program Coordinator with "cold call" training
Assistance from CALS Communications with Development materials

8. Objective Metrics to track progress:

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