

Right Serving Right Sizing – University Advancement May 10, 2017 Final Report

The University Advancement (UA) division supports, encourages, and promotes the State University of New York at Fredonia's academic mission and vision by interacting with students, alumni, faculty, staff, emeriti and retirees, friends, businesses, and foundations. The Fredonia College Foundation is the vehicle for receiving charitable gifts on behalf of the university.

The division's goal, as a revenue producer, is to engage and connect these constituents with the university to encourage student recruitment and retention as well as garner support and secure resources to enhance Fredonia's unique place in higher education. The division includes Development (fundraising), Alumni Affairs, and Marketing and Communications (creative design, web development, public relations, photography, and video production).

As part of the commitment to prudent fiduciary responsibility of private philanthropy as well as state resources within the purview of the University Advancement division, there is a long-standing protocol of consistent evaluation of the cost effectiveness of business practices, programs, and expenses. RSRS has empowered the staff to focus attention and do a 'deep dive' into planning and execution of initiatives.

Right Serving/Right Sizing

Considering the complexity of the service areas of the division, a key element for success is the firm commitment to consultation with key constituent groups, both within University Advancement and to all of the other divisions at Fredonia.

Throughout each project engagement, University Advancement team members regularly collaborate to support the shared efforts of the other advancement sections (Development/Alumni Affairs/Marketing and Communications) for the most creative and cost-effective solutions. For example: Development team members frequently collaborate with Alumni Affairs team members in building partnerships for fundraising and friend-raising initiatives, and Marketing and Communications team members frequently collaborate to create digital and print marketing materials for Development campaigns and Alumni special events. Each Advancement section is reaching to advance Fredonia and through collaboration, all elements are woven together for the strongest support of the university's goals.

Engaging Constituents in the Process Advancement/Foundation Staff

The University Advancement team meets bi-monthly to coordinate efforts and facilitate the seamless and collaborative flow of projects. Right serving/right sizing discussions have been a priority. At each meeting, staff identified target areas while attempting to do the right thing for the right reason in order to assist in all phases of right serving/right sizing. Colleagues challenged each other to think differently; to re-examine traditional practices.

In addition to the UA team think tanks, RSRS has been a regular agenda item on the bi-monthly Fundraisers meetings and the meetings of Marketing and Communications.

Fredonia College Foundation Board and Fredonia Alumni Association Board of Directors

Following the October 21, 2016, meeting of the Fredonia College Foundation Board of Directors, volunteers began to incorporate RSRS into standing board committee discussions and planning. The foundation board committees have brought forth their recommendations as a part of the committee structure of the board, working closely with Development staff on implementation.

- A subcommittee evaluated the maintenance of the Foundation House and developed an action plan to preserve the building and insure the property projects a solid and well-kept image.
- Foundation and alumni board meetings include reports on the process and progress of RSRS delivered by President Virginia Horvath, Interim Vice President Betty Gossett, and/or Alumni Affairs Director Patricia Feraldi.
- As part of the foundation board RSRS process, facilitating the expansion of corporate fundraising beyond Chautauqua County began with outreach into the Buffalo area by board subcommittee members.
- In the case of both the alumni and foundation boards, purposeful attention has been devoted to the nomination and appointment of new members. In the case of student board members, a better understanding of their role and expectations, including their own private philanthropy, has become a part of the appointment process.
- A subcommittee of dedicated volunteers from the alumni board of directors was formed at its November 10, 2016, meeting to address right serving/right sizing as it relates to the over 47,000 alumni. A report of their findings follows.

A focus group comprised of alumni board directors Robert Egan, Dr. Greg Gibbs, Carl Lam, and Karen (Shaw) Williams met and reviewed President Horvath's Right Serving/Right Sizing document. After considerable discussion, with the focus primarily on how the alumni association can assist in this effort, their February 10, 2017 meeting generated the following comments. Some of these ideas are already being implemented:

- *Establish a Scholarship Brick Walkway near the Williams Center*
- *Partner with the Admissions Office and invite potential students to events that showcase alumni talent and success*
- *Limit the amount of hard copy, printed material that is sent from the office*
- *As a segue regarding the printed material, send a survey to alumni to determine how important it is to mail hard copy*
- *Identify alumni to attend Admissions' regional events*
- *Invite more alumni to campus to share knowledge and expertise*
- *Allowing alumni (and charging them) to stay in residence halls – as space permits*
- *Combining the annual 50-year class reunion celebration with Homecoming Weekend*

Engaging Alumni

Attracting and fully engaging all alumni is a constant part of the division's mission. However, the department has launched a more robust outreach, with an emphasis on younger alumni, through social media platforms.

- A survey developed by advancement staff was featured in the January, 2017 issue of *The Statement*, focusing on assessing the best way to deliver content to alumni and establish preferences for alumni activities, events, and timing. Alumni were given the option to respond online, or on hard copy through regular mail. Tracking and reporting was coordinated in-house. Among other preferences, alumni reported that *Class Notes* and alumni profiles are favored elements of *The Statement*.
- Plans are underway for an aggressive outreach to younger alumni through online, broadcast e-mails and social media. This includes the launch of updated Alumni webpage and official Fredonia Alumni social media pages, as well as establishing more of a presence on LinkedIn.

Campus Community

The University Advancement Division Review report was delivered to the President and Interim Vice President of University Advancement at the end of November. Thorough review is in process.

However, early analysis by division members indicates a general sense that the University Advancement division is an efficient unit. This was conveyed a number of times throughout the divisional review materials.

Comments in the report reflect a general understanding that University Advancement does a lot with a little; and there seems to be a recognition that there is a lack of adequate staffing levels.

Reaction to comments in the report that colleagues across the campus do not have a good understanding of what the “foundation does” resulted in an increased emphasis on the part of Development team members to meet with faculty and staff individually, as well as create a plan to increase meetings by a team from Development in departmental meetings across the campus to explain the role and mission of the Development office and the Fredonia College Foundation.

New Initiatives to Foster Increased Revenue

Brick Walkway

Direct revenue generation is also a part of the challenges of the Office of Alumni Affairs, for programming funds as well as university priorities.

In response to and in anticipation of decreasing enrollment and subsequent reduction in the revenue generated from the Student Services and Programs Charge, the alumni association had already begun implementing a number of measures to be able to meet the increasing expenditures of the alumni office including scholarship assistance, the secretary's salary, and programming for students and alumni.

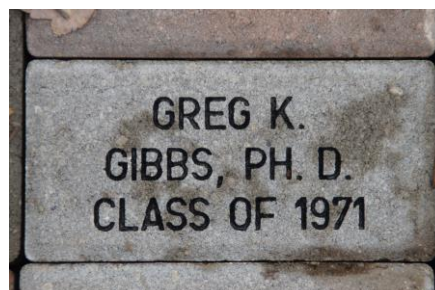
The brick walkway was established not only to offset the reduction in student fees, but also to help replace revenue that had been generated by affinity programs that were no longer being offered to the alumni association such as the Bank of America credit card and a reduction in the royalties from the Liberty Mutual insurance program.

As part of this joint project of Alumni Affairs, Development, and Marketing and Communications, brick walkway donors are being solicited as part of the annual giving program and acknowledged jointly in personal notes with the cover featuring a photo of the engraved brick and a message from staff of Development and Alumni Affairs. In addition, Development staff are tracking, stewarding, and soliciting brick donors.

It was hoped the brick project would attract more young alumni, providing them a way to leave a mark, even though they may have limited means. Of the 156 bricks purchased prior to the first installation, 49 bricks were purchased by young alumni (those having graduated in the past 20 years.) While it accomplished the goal of attracting young and new donors, it also engaged a wide range of ages and included gifts from established major donors and geographic reunion groups, as well as reunion class gifts.

As noted above the brick program has been integrated into the annual giving program, and as such, has increased efficiencies in outreach costs as well as staff time. In addition, the project has strengthened the collaboration between Alumni Affairs and Development.

The first installation of bricks purchased by alumni and friends was completed in time for Homecoming 2016. Promoted by the alumni association, the effort raised over \$20,000. The fundraiser continues, with new bricks being purchased on-line on a weekly basis, for installation in time for Homecoming 2017. There are currently 179 bricks either in place or ordered, with new orders being placed every week.



Comprehensive Campaign

Fundraising is an ongoing activity, but a heightened thrust is created through “Comprehensive Campaigns,” whereby a goal is announced featuring specific areas of focus within the university.

In addition to annual appeals and specific naming campaigns, such as those for the Science Center and the Rockefeller Arts Center Studio Complex, The Fredonia College Foundation Board of Directors and staff have conducted three successful comprehensive campaigns.

A fourth comprehensive campaign is in the initial silent phase, with a projected public announcement coming soon.

A committee has been formed that includes campus representatives from faculty, deans, directors, vice presidents, foundation board members, development and Marketing and Communications staff to establish the goals and focus areas, and help with the creation of materials and outreach.

<http://home.fredonia.edu/foundation/naming>

A Broader Sponsorship Concept

By securing charitable gifts from individual donors, in addition to corporations, that cover program costs, the foundation has the ability to generate revenue for the campus. Private individual donors recently made a campaign pledge that will be providing funds to contract the services of an international musician, help to pay for publicity costs, and generate revenue back to the university through ticket sales.

Planned Giving

Planned gifts help to ensure the future financial viability of the university. While the revenue may not be as immediate as a major cash gift, bequests have historically contributed to transformational endowments serving the campus.

Some of the more well-known endowments funded through bequests include the \$350,000 Mary Louise White Endowment in English, the \$860,000 James J. Kaminski Scholars Endowment for chemistry scholarships, and the \$1 million Juliet J. Rosch Endowment in School of Music.

By increasing attention to planned giving, a goal of adding 10 new members to the Dallas K. Beal Society in 10 months during 2016 - 2017, was reached in the first three months. Suggesting a planned gift is becoming a regular part of major gift discussions with donors of all ages. The Fredonia College Foundation has recently been named as the beneficiary of nearly \$1 million planned gift to benefit education student scholarships.

As part of RSRS review, the department identified planned giving as an opportunity for growth. Recently, the Development team has concentrated on expanding and improving the image and outreach to include a wider range of planning ideas. The new model embraces more constituents, while highlighting the concept of planning throughout one’s entire life, rather than what has traditionally thought to be the “prime years” for potential donors to consider a planned gift.

With the new approach, *Blueprinting your Legacy*, that includes campus constituents as well as select age groups of alumni, the related messages to segmented groups are tracked within the total alumni population. Because of this, the Development team is becoming better positioned to offer assistance in a timely fashion across multiple levels of age, engagement, and constituent category.

This planned giving multi channel approach gives fundraisers the opportunity to engage alumni of all ages to consider legacy gifts.

The multi-channel approach includes:

- **Email Blast**, age segmented to include analytics that help fundraisers to further engage alumni who show interest. Segments include: **Motivating**: Alumni Ages 70+; **Transitioning**: Alumni Ages 55-69; **Recurring**: Alumni Ages 40 – 54; **Educating**: Alumni Ages Under 40.
- **Webpage**, interactive, specific to encouraging planned giving interactions, with analytics.
- **Social Media**, inspiring videos created in house by Marketing and Communications staff and student interns.
- **Traditional Newsletter**, mailed each semester to targeted alumni and on campus community.
- **Media**, animation videos and donor story videos to help inspire alumni.

<http://plannedgiving.fredonia.edu>

<https://www.dropbox.com/s/ournroska9py887/LegacyFinal.mov?dl=0>

Opportunities to Reduce Spending and/or Redirect for Greater Impact

An evaluation, begun well before RSRS, as part of the division's on-going assessment of activities, that resulted in discontinuing a program, redirecting funds and developing a new initiative to increase revenue is represented by the "phonathon" which was ultimately replaced by #FREDlanthropy Day.

Phonathon

On February 2, 2014, staff opened discussions regarding the discontinuation of the phonathon, citing reasons such as declining return on investment, aging equipment, causing staff to devote more time to technology than fundraising, and the costs of replacing the outdated equipment.

The ensuing discussions culminated in a financial analysis of the phonathon since automation (2007-2014) and a review of cost and options related to software. The results demonstrated a decline in both gifts and revenue over time taking into consideration programmatic expenses (i.e., Campus Call maintenance and user fees, student caller wages, staff wages, etc.). The decision to shut down the call center and discontinue the phonathon was made; which led to further discussions surrounding efforts to replace the phonathon, including an increased presence in social media.

Having documented the considerable expense of updating Campus Call software and hardware, the division further analyzed other options including outsourcing the phonathon. All options proved to be cost-prohibitive. As a continuation of the process, in 2015, a consulting service (Royal & Co.) was engaged about annual giving in general and telefundraising in particular. At that time, the Royal & Co. consultant thought we had made the right decision in ending the call center operation in favor of social media fundraising options. This is the trend in higher education as exhibited in a recent CASE (Council for Advancement and Support of Education) article about Stanford University.

Since the consensus in the business that phonathon programs have become dinosaurs, University Advancement began to intensify plans to move in a different direction by creating some interim steps before #FREDlanthropy, such as adding an additional annual appeal via mail, e-blasts, and increasing on-line giving efforts. These steps led to the development of the concept ultimately titled: #FREDlanthropy Day. The entire concept surrounding #FREDlanthropy Day has proven to be a good replacement for the calling program, and the division anticipates continuing to grow the program.

#FREDlanthropy Day

A team was formed within the UA division with the charge to develop a "Day of Giving" event. This team of Development and Marketing and Communications staff led to a series of "think tanks" to get input from the entire University Advancement Division. From these team meetings the concept of #FREDlanthropy Day was born. The "think tank" approach captured the imagination of the full team, resulting in planning and execution becoming an all-hands effort; with each team member lending their expertise at just the right time. By utilizing the team, students, and campus equipment for video production, critical in marketing the event, savings of a minimum of \$10,000 was realized.

The resounding success of Fredonia's first annual day of giving, now known as #FREDlanthropy Day, was held on October 4, 2016. Major gift fundraisers scheduled donors for check presentations and mounted matching gift challenges, Alumni Affairs and the annual appeal staff engaged alumni across the country for photos with Fredonia t-shirts and a #FREDlanthropy Day sign to be used on Facebook and other social media teasers. All members of the team encouraged their friends and colleagues across the campus to become involved.

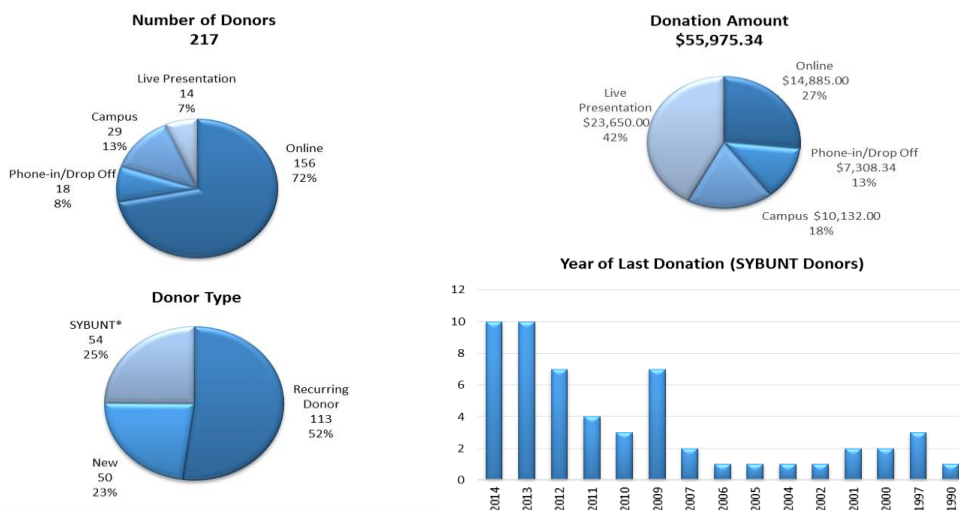
The importance of engaging young alumni as donors cannot be overstated, as they become the base of future annual giving, with many advancing to become major donors and bequest candidates. With specific emphasis on young alumni, the day exceeded the expectations by more than doubling the dollar goal expected, number of young donors, and re-engagement of lapsed donors. When compared to previous years, the number of new donors doubled: (67 in 2014, 82 in 2015, and 169 in 2016), and more than doubled the number of "young" donors: 20 years or less out from graduation (33 young in 2014; 65 young in 2015; 138 young in 2016).

A review of the effort took place shortly after the event to evaluate successful efforts, and opportunities for improvement of alumni participation. The team has continued to assess ways to grow and improve the day, and using what we learned to apply to other fundraising efforts as appropriate.

The University Advancement Division recently received notification of having won the 2017 Award for "Best of Category" in Fundraising Packages from SUNY/CUAD; the SUNY-wide organization of advancement and communications professionals.

#FREDlanthropy Day Results October 4, 2016

On October 4, 2016 Fredonia College Foundation raised \$55,975.34 from 217 donors. Online donations comprised the majority, while donations were also accepted via phone or in person, on campus via payroll deduction, and in LIVE Facebook presentations throughout the day. While the largest sum of money was contributed during presentations, the goal of engaging many new donors through small online gifts was successful with 50 new donors. There was also an unexpected benefit of re-engaging lapsed donors, a group making up 25% of donors that day. The Year of Last Donation chart represents the amount of time having lapsed for those re-engaged donors, ranging from two to sixteen years.



You Visit Virtual Tour

A second highly successful example of discontinuing a program and redirecting funds is the “YouVisit Virtual Tour.” This led directly into the RSRS model of collaboration across divisions for more efficiency and improved activities. It also redirected efforts for greater impact, by moving from the static campus tour into an interactive tour.

Conversations among members of the Admissions staff, members of the Strategic Enrollment Management (SEM) Committee and Marketing and Communications led to this joint project between Advancement (Marketing and Communications) and Student Affairs (Enrollment Services); funded through redirected funds – reallocated use of Faculty Student Association (FSA) recruitment funds to meet priority needs identified in SEM Plan.

Placed on a fast track by the new Director of Marketing and Communications, in conjunction with SEM and Cabinet, the virtual tour replaced the web based campus “virtual tour” utilized by Admissions for years. This is an example of partnering to redirect funds to improve public image with substantial cost savings.

One difference from the previous campus tour program - the new virtual tour allows the campus to gather information from all visitors; providing the Admissions team with useful material for recruiting potential students.

The analytics and outcomes from this initiative continue to improve beyond what would be considered industry standards. At the time of the University Advancement Progress Report in December 2016 the conversion rate was 8.58%. As of April 18, 2017, analysis indicates 9,106 total visitors, out of which the Admissions staff developed 656 new leads (users who have registered), and have had 415 total actions (people who click “visit campus,” “apply online,” or “learn more”). This represents a conversion rate of 11.75%, exceeding YouVisit’s average of 10%; showing that our tour receives above average results.

The YouVisit virtual tour can be viewed on the Fredonia homepage at www.fredonia.edu. Click on large button halfway down the page.

Campus Calendar

Because there has been universal campus consensus that the current calendar system is difficult to navigate and too expensive, the calendar system for the university had been under review for over a year. Again fast tracked by the new Director of Marketing and Communications and funded through redirection of resources made possible by RSRS paradigm shifts, “Localist” the new calendar system, is being instituted and showing positive results. The web team conducted a two-week “trial run” of the product with several key departments on campus to identify any issues, and began to see the possibilities the new product creates. Training for the calendar began in the early spring and will continue during the summer. This redirection has been made possible using savings from re-thinking current products and redirecting funds from trademarks and licensing. The calendar will be more user-friendly with a better search mechanism and can feature events. Any department can add to calendar by submitting event information.

Print Material

Review is ongoing. Marketing and Communications is designing templates to be used to print material and letterhead on an as needed basis instead of large print quantities being ordered. “Re-think before creating, ordering and re-ordering” will be an integral part of the new model within University Advancement. In addition:

- Over 1,000 fewer copies of *The Statement* were ordered for the January 2017 *Statement*, without noticeable problems of shortages in offices that use it post-publication for a variety of purposes.
- The Fredonia College Foundation’s Annual Report is being evaluated for a different format, perhaps including the information in editions of *The Statement*.

- Quantities needed for proper utilization of the All Funds and Awards brochure is also under evaluation, along with materials needed for the comprehensive campaign.
- Evaluation and shifting of attention and resources continues regarding more use of video and social media; which will represent cost savings over print material. This is in keeping with the preferences already identified by prospective and current students and young alumni.
- Proposals are being developed to serve internal needs of the campus while allowing our graphic design team to spend more time focused on strategic marketing content.

Reimagining Staffing and Job Responsibilities

All areas of University Advancement are understaffed. Due to the interim nature of the position of vice president of University Advancement, until December 31, 2017, it is not feasible for the division to launch any sort of re-organizational staffing plan.

However, the department continues to adjust to circumstances as change and opportunities present themselves. Each approved position within the division is reviewed and reimagined to meet changing needs. Job duties of current employees are being evaluated on a regular basis to meet the emerging needs of the comprehensive campaign, as well as of the division and the university.

When the Director of Marketing and Communications resigned in Spring 2016, the situation presented the opportunity to create a case for the replacement to be a person with advanced video and social media expertise, along with the traditional strengths in the marketing and communications arena.

A temporary position was created to increase outreach and engagement of young alumni and students through social media. The importance of this position lies in the need to increase the participation rate of alumni and focus on young alumni for long term engagement with the university. Early success has already been evidenced by this role in #FREDlanthropy Day results, of which this position served a critical role. Emphasis of social media in this role also allowed for a reimagining of an open assistant web designer/social media manager position.

The most recent example is the videographer position filled in March 2017. This position was previously an assistant web designer. By changing the vision of this position to a videographer/editor, it is possible to dynamically showcase the "story of Fredonia" like never before. We can now compete on digital platforms with videos touting our campus and students. The analytics from a few key, branded videos have already shown a tremendous audience reach.

Collaboration Across Divisions for More Efficiency and Improved Activities **Fredonia College Foundation/Development**

- Partnering in the Admissions Process

The Fredonia College Foundation distributes around \$1 million in scholarships and awards to students each year, much of which is used to assist Admissions to recruit the best and brightest students. In an effort to recruit and accept these students at a much earlier date, Admissions requested the foundation's collaboration to identify and quantify the 2017-2018 available recruitment scholarship funds. The foundation was an active participant in this process with Admissions and successfully provided all information well within the expedited time frame.

- Working with Natural Partners

The Development staff has made a concerted effort to work closely with academic leaders and faculty as natural partners. These relationships have proven to be instrumental in fundraising efforts.

Marketing and Communications/Admissions Collaboration

As part of Strategic Enrollment Management (SEM) and Right Serving/Right Sizing, the staff is synchronizing timing of marketing content and messages to prospective students. Examples include videos showcasing internship opportunities, which are placed on our social media platforms, as well as an introductory video for the Fredonia-based Accepted Student Reception. Slides are also being created on the homepage of the website that correspond with email messages admissions is sending out to prospective students. Accepted Student Reception video link: <https://www.youtube.com/watch?v=fOIJc7hQLvI>

Non-Traditional Social Marketing

The marketing team has created geofilters for the social media platform Snapchat throughout the spring semester, which the Admissions team used at events like regional Accepted Student Receptions throughout the state, and Multicultural Weekend. The filters were viewed over 24,000 times; meaning 24,000 views of the Fredonia brand directly by young adults, our key audience. Spending only \$669 to reach that key audience, this represents just pennies compared to traditional advertising, and gets Fredonia directly in front of that young audience more effectively than traditional media.

Admissions/Residence Life Collaboration

Also part of efforts in SEM and Right Serving/Right Sizing, Admissions and Residence Life worked together to feature advertising about the reduced housing rates on campus beginning this fall. The ad was in a brochure mailed directly to the homes of every high school sophomore and junior in Erie and Niagara counties. Additionally, the ad was placed digitally in Erie and Niagara counties for 30 days in March and April. The digital ad had 136,120 impressions (the number of times the ad displayed), and 266 clicks (web users who clicked on the ad and were sent to our messaging about lower housing rates). The “click through” rate (CTR) of .20% was more than double the rate of .08% which is considered a decent rate in the marketing business.

Strategic Enrollment Management (SEM) Plan

University Advancement’s mission is directly tied to engaging external constituencies to encourage solid student recruitment and retention, as well as garner support and secure resources to enhance Fredonia’s position in higher education. Alignment with SEM is integral to all of the activities within University Advancement. The Interim Vice President and Director of Marketing and Communication are members of the SEM Steering Committee. Examples of outcomes are:

- Outreach Across Campus - As with the successful collaborations of Localist and the YouVisit virtual tour, University Advancement will remain active with outreach across the campus in order to improve on cost savings, as well as improved service impacting university priorities.
- Redirecting resources to meet SEM priorities (examples: FSA recruitment funds, licensing and trademark resources), reviewing Foundation scholarships and processes, and targeting proposals to regional foundations to support academic student services programs.
- Campus Department Alignment – UA is more closely aligning our work with Student Affairs and Career Development.
- As part of SEM discussions, a more effective allocation of the FSA recruitment funds was instituted.

Assessment

Traditional data collection is in place, particularly regarding fundraising initiatives. Total giving, endowment growth and total spending on grants, scholarships and academic support has been and will continue to be the major metric that University Advancement/the Fredonia College Foundation will use to evaluate financial success.

During 2016, total giving to the foundation was \$2,340,586, 22 new endowment funds were established (compared to 12 in 2015), endowment value grew nearly 10%, and total spending/support was \$2,166,238.

However, University Advancement is looking deeper into the data to answer the how, where and from whom these numbers came. Giving by donor type, total active donors and more aggressive and active management of planned giving are all examples of monitoring the details within the data. Focusing on such details enables more efficient resource allocation. For example, understanding that the donor types “Alumni” and “Faculty/Staff” are the largest pool of available donors means they also provide the largest potential growth.

During the past year, Alumni and Faculty/Staff have had total giving donor growth of 15% and 16%, respectively. This growth in new and lapsed donors may not yield major and immediate total giving growth but at the very least it fosters the idea of giving and perhaps creating long-term donors.

The recent success of the increased reliance on good analytics lies with the “home grown” distribution of the multiple channel approach which helps the department assess the engagement in messages concerning planned giving; a vital element of the total fundraising package of the development team.

Improvements in online giving options have been developed that have facilitated not only donor ease in making a gift, but have also helped Alumni Affairs to facilitate registration for alumni events; and eases the process of event planning for the division. Increased use of online giving options has created a side benefit of increased donor feedback regarding the process and experience in general.

Marketing and Communications is using analytics like never before to gauge content marketing efforts. We are constantly tracking social media interactions on Snapchat, Instagram, Twitter, and Facebook. Tracking those analytics help us decide the kind of content that is effective on each platform. We are using Google Analytics to examine web traffic to know which pages are the most popular and need to be given the most attention. The analytics on YouVisit not only help us track generic analytics, but gathers contact information from prospective students and/or their parents; information Admissions uses to reach out and engage.

University Advancement is committed to continue to utilize the mindset, evaluation, planning, and execution of dynamic initiatives developed during the Right Serving, Right Sizing process.

Continuing Emphasis

- Attention to and use of analytics as part of assessment and continuous improvement
- Increased support opportunities for fundraising efforts
- Strategic collaboration with other campus divisions and funding to support creative initiatives
- Continued efforts towards savings and efficiencies
- Review of the scholarship process, particularly in reference to SEM initiatives
- Increased support for university emerging needs as the foundation endowment grows
- Regularly evaluate constituent feedback for continuous improvement
- Actively and consistently engage young alumni and current students
- Attend to staff development
- Creative initiatives to increase alumni and other constituent participation rates
- Improvements to record keeping and donor stewardship
- Development of a consistent process for online and business practices