

Administrative Department/Unit/Division: University Advancement
Administrative Support Plan 2017-2023

I. Introduction



State your administrative department/unit/division mission statement.

University Advancement will continue to develop connections with alumni, parents, friends and organizations that further advance excellence in teaching, research and scholarship.

Outline briefly your “vision” for the 2017-2023 planning cycle.

The 2017-2023 UA strategic plan focuses on increasing resources to support the university goal of becoming a nationally recognized research university. Through strategic initiatives and increased support from the Development Foundation, University Advancement will seek to increase philanthropic support to \$40 million annually and make substantial progress toward reaching \$400 million total endowment funds. As part of the effort to become recognized as a national research university, University Advancement will seek to increase the visibility of and recognition of the university through an increased public relations effort in collaboration with University Marketing. University Advancement will align fundraising priorities to support the overall university strategic plan.

Using University goals and initiatives as a guide, list and briefly describe your top five priorities for the 2017-2023 planning cycle and indicate the university goal/initiative to which the unit's goal is linked.

Goal 1 – Increase annual philanthropic support to \$40 million per year. In fiscal year (FY) 2016, the university raised a record \$26.4 million. In order to reach the \$400 million endowment target required for National Research University Funding (NRUF) eligibility, fundraising will need to maintain growth toward reaching \$40 million annually by 2023. (University goal 4.4 – Implement fundraising initiatives in support of the university's strategic direction.)

Goal 2 – Expand overall communications by identifying strategic areas of growth and opportunity in media relations, publications, and advancement communications. Key initiatives include collaborating with Marketing to develop additional branding options for the university; revising and implementing a university communication plan; developing and implementing a strategy to increase placements with regional and national media outlets; expanding the use of social media, Hillviews, and digital presence to promote university goals and priorities; and developing communications and collateral materials to support campaign fundraising. (University goal 4.9 – Increase the utilization and effectiveness of available technologies through more impactful implementations, education, training, marketing, and communications.)

Goal 3 – Increase alumni engagement at the university. The university seeks to build relationships with alumni by securing a more visible alumni office on campus; increasing alumni engagement and giving through collaborative initiatives across campus units; working with the Alumni Association to develop a financial plan which sets revenue targets and spending priorities; and collaborating with the Alumni Association to evaluate and strengthen programs and services. (University goal 4.12 – Effectively engage alumni and external constituents to influence and generate human and financial capital opportunities.)

Goal 4 - Strengthen support to donors and university community through improved gift processing, constituent record maintenance, and endowment management. Key initiatives include: improve gift process management through automation and systems enhancements, including inter-departmental ticketing and membership handling; increase access to information to enhance effectiveness of communication and fundraising efforts; enhance donor experience by improving gift receipting and stewardship communications; and improve endowment management, exceeding 95% utilization of available endowment funds. (University goal 4.10 – Enhance the experience of the university community by continuously improving processes and interfaces.)

Based on unit goals, list the number of new (not replacement) staff lines you plan to request in the 2017-2018 fiscal year and in the remaining 2-6 years.

The following positions are expected to be created or filled during this strategic planning cycle:

1. Public information specialist
2. Graphic designer
3. Alumni chapter coordinator

Based on unit initiatives outlined in your plan, estimate the total amount of new funding that your unit will realistically need in the 2017-2018 fiscal year and in the remaining 2-6 years.

FY2018: \$1.5M

FY2019: \$2M

FY2020: \$2M

FY2021: \$2.5M

FY2022: \$2.5M

FY2023: \$2.5M

State the facilities (e.g. offices, workspace) that will be required for anticipated growth and new unit goals.

Alumni office space on campus (includes interim space in the LBJ student center and long-term goal to build a stand-alone facility at the site included in the Master Plan). Office space to accommodate approximately 23 - 27 additional staff to be hired, including the three specified in this plan and 20 – 24 new hires included in the Texas State University Development Foundation strategic plan.

II. Process

Describe, in a brief paragraph, the process used to develop your plan, including the nature and extent of staff involvement.

Beginning in spring 2016, each department in University Advancement held strategic planning retreats to identify key strategic initiatives for 2017 – 2023. In fall 2016, the ideas generated through these discussions were synthesized in a draft strategic plan for the division, including four goals and supporting initiatives aligning with the primary functional areas. This strategic plan was shared with all staff in January 2017 and feedback was requested. Final refinements were made between February and March 2017.

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III. Program Maintenance

Maintenance Need	Reason for Need	Cost	Result of Funding
Development officer travel	With additional development officers, out-of-state prospect visits, and increased development activity related to campaign plans, we expect travel costs to increase.	Additional \$20K per year / \$120K for 6 years.	Additional fundraising capacity.
Call center management	The call center used for fundraising and enrollment management will begin a new contract in FY2018. Costs will grow as calling volume increases.	Needs are met through Annual Giving budget, increases in unrestricted revenue, and cost-sharing with Admissions.	Increased annual giving from alumni and parents, and updated contact information.
Planned giving consultation	Beginning in FY2014, estate planning services have been offered to alumni and other constituents as part of the planned giving program.	\$100K per year	Increased fundraising from planned gifts.
Hillviews publication	Hillviews magazine increased from 2 to 3 issues per year since 2012.	Additional \$38K per year	Increased alumni engagement and fundraising capacity.
Credit card fees	Credit card processing fees have increased over the past several years from \$10K per year to \$30K per year as total giving has increased.	Additional \$20K per year	Increased annual giving revenue to the university.

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IV. Planning Goals (University Goal Statements)

Dept.	Unit Goal	1 yr	2-6 years	New Resources Required	Cost	Source of Resources	Assessment Criteria	University Initiative
University Goal 1: Promote the success of all students.								
University Goal 2: Offer high quality academic and educational programming.								
University Goal 3: Achieve significant progress in research and creative activity as measured by national standards.								
University Goal 4: Provide the necessary services, resources, and infrastructure to support the university's strategic direction.								
Development	Add 16 development officers and required support staff	X	X	New staff, office space, travel budget	\$9M	Development Foundation	Fundraising total	4.4
Development	Install two new donor recognition walls in the new university events center lobby	X		Design and construction of donor walls	\$100K	Special funding request	Fundraising total	4.4
Development	Campaign fundraising events	X	X	Catering, photography, decoration, printing, design	\$360K	Development Foundation	Event attendance, fundraising totals	4.4
Communications	Collaborate with Marketing to develop and promote additional branding options	X	X	Ad purchase, professional services	\$250K	Special funding request	Brand recognition & perception	4.9
Communications	Revise and implement a university communication plan	X		Professional services	\$55K	Special funding request	Improved communications plan and protocols	4.9
Communications	Develop and	X	X	Professional	\$100K	Special funding	Increase in	4.9

	implement strategy to monitor and increase placements with regional and national media outlets			services		request	regional and national placements	
Communications	Expand the use of social media, Hillviews, and digital presence for promoting university goals and priorities	X	X	Video content, design, copywriting, postage	\$100K	Special funding request	Social media followers, Hillviews readership survey	4.9
Communications	Develop communications and collateral materials to support campaign fundraising for university priorities	X	X	Design and print services	\$200K	Development Foundation	Materials to promote campaign priorities	4.9
Alumni Relations	Move Alumni Relations to LBJ Student Center	X	X	Renovation of new space	\$1.2M	Alumni Association & fundraising	Improved alumni space on campus	4.12
Advancement Services	Increase access to information to enhance effectiveness of communication and fundraising efforts.	X	X	Data append services and software	\$100K	Special funding request	Improved constituent information	4.10