2005

Annual Report
I. **Unit Title:** Alumni-Foundation

**Unit Administrator:** Keith Fulcher

II. **Data and information for department:**

III. **Personnel:**

**Noteworthy activities and accomplishments:**
Missy Pearce, Director of Phon-a-thon, organized the calling of 13,000 alumni and friends, which resulted in $103,282 in gifts and pledges. A 13% participation rate was achieved. Pearce also served on the Staff Technology Group and the Web Oversight Committee.

Vicki Fioranelli, Alumni Director, reorganized the Alumni Association’s Board of Directors committee structure to best serve the University’s and Association’s needs. Chapter meetings were held throughout the state of Mississippi and a new chapter was chartered in DeSoto County. Fioranelli serves as president of the Staff Council.

George Miller, Director of Development, organized the Eighth Annual Quadrangle Oak Society reception honoring donors who have named the University as a beneficiary to their estate. And published two quarterly planned giving newsletters mailed to 3,500 alumni over the age of 50. Miller served on the Learning Outcome Assessment Team.

Keith Fulcher, Executive Director, assisted in the completion of the $35 million “Wings and Roots” campaign, a five year effort with an initial goal of $12 million. Fulcher serves on the President’s Cabinet.

**Recommended change of status:**
Vicki Fioranelli was hired as Alumni Director. Missy Pearce received a title change to Director of Communication and Phon-a-thons. Pearce is responsible for the alumni magazine mailed to 21,000 alumni and friends and an e-newsletter mailed to 5,000 alumni and friends.
1. **Learning Outcome Assessment Plan**

**A. Learning Outcome #1**
Make use of services and benefits of the Alumni-Foundation Office (students)

**B. Assessment Tools and Methods**

*Measure One:* Number of times the Alumni House is booked by student organizations or for student events

*Measure Two:* Number of privately funded scholarships awarded to students

*Measure Three:* Number of volunteers involved in the Student Alumni Association (SAA)

**C. Data Collection and Analysis**

Data Collection Procedure:
1. Tracking the rental of the Alumni House by students and for student activities stands at fifteen. The SAA met monthly with average attendance of fifty students and two sororities utilized the House for events. Additionally, four athletic teams held cookouts at the House during the year.
2. The Alumni-Foundation’s CFO and Admissions Office collaborate on the privately funded scholarship process. New scholarship funds are created at the Foundation and notification of availability provided to Admissions Office.
3. Alumni secretary maintains roster of SAA volunteers who actively participate in Alumni Association events.

Analysis Procedure:
Data is compared to previous year totals for growth in number of student events at the Alumni House, increase in number of privately funded scholarships, and increase in number of SAA volunteers.

**D. Results of Evaluation**

Findings: Student awareness of the availability of the Alumni House is limited. Scholarship process is not seamless and needs reworking for greater efficiency in ensuring that all available scholarships are utilized. SAA was an overwhelmingly large number of students to manage to have an effective organization.

Recommendation 1:
Send notification to student organizations that the Alumni House is available for University-related events.

Recommendation 2:
Entering all criteria and associated information about scholarships in Banner for use by Admissions Office.

Recommendation 3:
Reorganize goals of SAA to become a more effective volunteer base.
E. Use of Evaluation Results
   Response:
   1. Student organizations will receive a notice at the beginning of school of the availability of the Alumni House for official use.
   2. Development Office has been assigned responsibility for entering all pertinent scholarship information in Banner.
   3. Alumni Office has met with SAA officers and plans are underway to realign goals with Alumni Association needs.

F. Assessment Team Members

Members: Vicki Fioranelli, Keith Fulcher, George Miller, and Missy Pearce
2. **Learning Outcome Assessment Plan**

A. **Learning Outcome #2:**
   Exhibit support of the mission of the Alumni-Foundation (Alumni and friends).

B. **Assessment Tools and Methods**
   - **Measure One:** Private Support Figures
   - **Measure Two:** Event Attendance
   - **Measure Three:** Participation Levels of membership in Alumni Association

C. **Data Collection and Analysis**
   - **Data Collection Procedure:** Data is collected through sound accounting practices as applied by the Alumni-Foundation’s CFO to determine the level of annual support.
   - **Analysis Procedure:** Data is compared to previous year totals for growth or decline in specific areas.

D. **Results of Evaluation**
   - **Findings:** Total giving to the Foundation topped $36 million in gifts and pledges as of July 2005. Campaign totaled $31 million in April 2004. The Foundation’s endowment fund increased from $10.9 million to $13.0 million. Numbers for comparison of attendance at events and alumni membership are currently being compiled for presentation at the October 2005 Board of Directors meeting.
   - **Recommendation 1:** Increase stewardship activities to thank donors for gifts and utilize screening service to identify prospective donors.
   - **Recommendation 2:** Automate Alumni Association’s membership tracking process for easier access to data.
   - **Recommendation 3:** Publicize the impact private support has on students, faculty, staff, and overall academics.

E. **Use of Evaluation Results**
   - **Response:** The Development Office has created a “Stewardship Plan” and contracted with a company to screen database for wealth indicators. Alumni Office is pursuing consultant to advise on effective use of Alumni module of Banner software. Weekly news releases will be sent to area newspapers featuring impact of private support.

F. **Assessment Team Members**
   - **Members:** Vicki Fioranelli, Keith Fulcher, George Miller, and Missy Pearce
3. **Learning Outcome Assessment Plan**

A. **Learning Outcome #3:**
Demonstrate a working knowledge of the services and benefits of the Alumni-Foundation (faculty and staff).

B. **Assessment Tools and Methods**
- **Measure One:** Applications to the Kent and Janice Wyatt Faculty Development Fund
- **Measure Two:** Policies and procedures of the Alumni-Foundation are followed
- **Measure Three:** Participation of Faculty/Staff as donors or as members of the Alumni Association

C. **Data Collection and Analysis**

   **Data Collection Procedure:**
   1. Vice President for Academic Affairs Office accepts applications for the *Kent and Janice Wyatt Faculty Development Fund*.
   2. Annually review Foundation policies and procedures through the Foundation Board’s Trusteeship Committee and through the Alumni Association’s Board of Directors.
   3. Faculty and staff are coded as employees and their giving history is tracked in Banner.

   **Analysis Procedure:**
   Data is compared to previous year totals for growth or decline in specific areas.

D. **Results of Evaluation**

   **Findings:** Vice President of Academic Affairs reports need for an additional $15,000 to cover all Faculty Development requests. Policies and procedures of the Alumni-Foundation are consistent with comparable institutions, but need to be articulated to campus personnel. Faculty and staff have contributed $263,804.00 to the “Wings and Roots” campaign through 2,674 gifts as of June 30, 2005.

   **Recommendation 1:**
   Continue to identify new sources of revenue to support Faculty Development needs.

   **Recommendation 2:**
   Provide policy and procedure statements to all Cabinet members and Deans on most relevant issues as way to begin education process.

   **Recommendation 3:**
   Create a Faculty and Staff Appeal as an opportunity to support their academic or departmental area.
E. **Use of Evaluation Results**

**Response:**
Alumni-Foundation provided University with $100,000 in unrestricted funds of which $30,000 was used to establish six $5,000 Faculty Prizes to recognize excellence in teaching, service, and research. Development Office mailed memo to Cabinet members and Deans advising them of the University’s “Fund Raising Policy” as adopted by Cabinet in 2001. Request was made to distribute information to all employees who are engaged in fund raising projects. Faculty and Staff Appeal is in the draft format with targeted date of distribution for Spring semester.

F. **Assessment Team Members**

**Members:** Vicki Fioranelli, Keith Fulcher, George Miller, and Missy Pearce
The programs and activities of the Alumni-Foundation Office are designed and exist to enhance the awareness of and support for Delta State University.

The Alumni and Foundation staff, the Alumni Association and Foundation boards of directors are responsible for coordinating the University’s outreach programs to alumni, friends, donors, media, and governmental agencies. The Alumni-Foundation is committed to helping the University achieve its Strategic Plan goals so that the academic quality and service to the region can be maintained and advanced.

The Alumni Association and the Foundation are approved as non-profit organizations and subscribe to the IRS requirements in line with maintaining 501(c)(3) status.
Mission Statement

The Delta State University Foundation, Inc. is a private nonprofit organization dedicated to the growth, development, and enhancement of Delta State University and its faculty, staff, and students, with special emphasis given to the attainment and maintenance of academic quality through the solicitation and professional management of gifts derived from private sources.

The Delta State University Strategic Plan: 2001-2005 emphasized the need for providing increased external funding to offset continuing budget cuts and reduced allocations for higher education statewide (p.66).

It was recommended that private sector support for the University be ensured through a comprehensive fund raising program that included the planning and beginning of a major gifts capital campaign. Additional recommendations included in the Strategic Plan included the following:

1. Efforts are to be made to enhance communication from the Delta State Foundation to faculty, staff and administrators regarding suggested procedures to be used to organize and conduct fund drives, campaigns, and solicitations to acquire private contributions and to enhance positive relations with donors.

2. The University President will identify a representative group to define funding priorities and to work with the Foundation to identify prospective funding sources.

3. Each academic college/school will initiate an organized annual fund effort to be coordinated with the DSU Foundation.

4. The DSU Foundation will analyze and recommend a strategic plan for the coordination and integration of alumni support services to ensure readily available information of the strategic plan and direction of Delta State University.

5. The DSU Foundation will ensure information is available to the faculty and staff of Delta State concerning private support efforts.

Performance indicators for the above areas are listed on page 66 of the University’s Strategic Plan. The DSU Foundation annual report reflects an increase in funding from all established funding sources (private, public, state and Federal) and the initiation of a fund raising campaign.

Action Plan

At the direction of the University President and the Foundation leadership, a campaign planning study was initiated in September 1999 to solidify the private support efforts of the University and build upon the foundation of success experienced during the university's first organized
campaign, *The Campaign for Delta State*. The $5 million campaign concluded on December 31, 1999 with $10.7 million in gifts and pledges.

In 2000 the DSU Foundation contracted the Atlanta-based firm of Alexander Haas Martin & Partners to assist in planning for a new and more comprehensive campaign. The Foundation Office was asked to design a program that accented the fact that fund raising success is dependent upon a collaborative campus-wide effort and must be need-based, capable of enhancing the operating budget, and designed to integrate the institution's vision and mission. Campus personnel were asked to identify needs for their respective areas through the preparation of a "case statement" that served as a guide for the campaign planning study.

The program, entitled *Building Fund Raising Bridges*, served to enhance overall communication between the Foundation and University faculty, staff and administrators regarding procedures and development strategies. It also developed positive donor relations as proposed in the University's Strategic Plan: 2001-2005.

*The Wings & Roots: Let Our Legacy Soar* campaign was begun during the 2000-2001 school year to coincide with the University's 75th Anniversary. A silent phase goal to raise $12 million for defined goals by the year 2005 was approved by the Foundation Board of Directors with a long-term goal of increasing the Foundation's endowment to $30 million by the year 2010.

**Accomplishments To Date**

A review of the *Wings & Roots: Let Our Legacy Soar* campaign report dated October 21, 2002 reveals that the original goal of $12 million has been fulfilled since $12,674,812.54 in pledges and gifts had been raised. In 2004, the Foundation Board of Directors approved a new goal of $35 million.

As of June 2005, the campaign has received gifts and pledges totaling $36 million.

It is noted that the members of the DSU Foundation Board of Directors as of June 2005 have provided pledges and gifts in the amount of $3.9 million or 159% of their announced goal of $2.5 million. Faculty and Staff (employees of the University) have provided a total of $264,000 from 2,674 gifts.
An emphasis on planned gifts has resulted in 18 new planned giving donors, which accounted for $1.9 million in gifts/pledges through estate gifts. Samples of planned gifts that support University goals include: two planned gifts designated to endow two professorships in the Languages and Literature Department (Goal 2), a six-figure endowment for scholarships to help recruit students (Goal 2), and a third designated for an endowment to fund intramural sports (Goal 11). A planned giving newsletter, Delta Legacy, initiated in 2003-04 as the vehicle for promoting and educating planned giving opportunities (Goal 15), continues to be mailed three times a year to alumni over the age of 60 (approximately 3,500 alumni).

The emphasis on expanding the geographic base of support (Goal 15) was accomplished through the establishment of the first-ever annual fund appeal conducted in March and April of 2004. The third calling session was held in Spring 2005 resulting in $103,282.00 in gifts and pledges. The fourth calling session is scheduled to begin September 25th, 2005. The Delta State Fund supports the unrestricted needs of the Alumni-Foundation. Twenty-five student callers are hired for each session and 14,000 alumni and friends receive a call inviting them to support the University.

The emphasis on grants from external sources (Goal 14) has resulted in $18.3 million in new funds designated for such University priorities as the Delta Health Initiative, the Delta Education Initiative, the Center for Community Development, the Coahoma County Higher Education Center, and the Early Learning Mentoring Program.

The Delta State University Foundation provided $4,083,000.00 to the University in 2004-05, a 28% increase over the previous year, in support of University needs and priorities.

To assist the University in achieving Goal 10 of “increased financial support to students through scholarships…” and its External Affairs goal (Goal 14) to “expand the pursuit of external funding for…student financial assistance” the Foundation offered 251 privately funded
solarships in 2004-05. A total of $204,242.80 in scholarship money was provided to the University.

The University’s Instructional goal (Goal 3) to “promote faculty development through a comprehensive program designed to strengthen the faculty in teaching, service, and research” is furthered by the Foundation’s continued support of the Kent and Janice Wyatt Faculty Development Fund, which was increased to $35,000 in 2003-04. The 2004-05 budget of the Delta State University Foundation Board of Directors continues to fund faculty development at the $35,000 level.

Unrestricted giving to the Foundation provides funds to meet the greatest needs of the University (Goal 14). Gifts of $754,884 were received in 2004-05 compared to $264,320 received in 2002-03. The Foundation is able to meet the greatest needs of the University through unrestricted gifts, which allow the University to target funds to specific projects and activities.

The Foundation secured donors to assist with renovation and construction projects that impact on the academic programs of the University. Major construction or renovation projects that continue to be an active part of the campaign include the:

1. Hazel and Jimmy Sanders Sculpture Garden, (Goals 9 & 11), ($300,000),
2. Louis Baioni Executive Training Center (Goal 6 & 11), ($250,000) – remodeling of site located in Broom Hall Auditorium,
3. Delta Music Institute, (Goal 8), ($150,000) – courses in new program are currently being taught while funding for renovation of Whitfield Gym are being sought, and
4. Billy Dorgan, Jr. Student Performance Center, (Goals 10 & 11), ($1 million) – to be completed in the spring of 2005.

The Foundation is committed to seeking funds from businesses and industries (Goal 7 and 14) that serve to meet the goals of the University. As an example, Viking Range Corporation in Greenwood has committed $80,000 worth of equipment to renovate the Family and Consumer Science Foods Laboratories. The renovated labs fully equipped with Viking products will be named in memory of Ada Mitchell, Viking’s first HR Director and graduate of Delta State who died unexpectedly following minor surgery.

In June 2005 the DSU Foundation Board of Directors approved the 2005 fiscal year budget that most notably provided:

1. $100,000 in unrestricted funds to the University, which was used in 2004 to initiate six $5,000 “faculty prizes” in the areas of teaching, research, and service (Goals 2, 3, and 8),
2. $100,000 towards a $350,000 endowment for The Elliott Science Symposium endowment (Goals 2, 8, and 9),
3. $10,000 towards a $150,000 endowment of the “Benoit” Holloway Graduate Accounting Scholarships (Goals 2 and 10),
4. $22,000 for the Office of University Relations, an increase of $7,000 from FY 2002. The University Relations Office supports efforts in the area of student recruitment and retention (Goal 10). The Foundation allotment is the only source of discretionary revenue for the University Relations Office, and
5. $25,000 in unrestricted support to the President’s Office.
Expected Outcomes for 2005-06

The formal public announcement of the 
*Wings & Roots: Let Our Legacy Soar* campaign was held on April 28, 2004 during Inauguration Week for Dr. John Hilpert. Continuing the success of the major gifts phase of the campaign and continuing to build on the success of *The Delta State Fund* are top priorities.

The Foundation is committed to a long-term support of University goals. Therefore, the Foundation’s 2005-06 fiscal year budget will:

1. continue unrestricted giving to the University at the $100,000 level, which will allow the University to continue providing six $5,000 “Faculty Prizes,”
2. complete the endowments on the Elliott Symposium and Holloway Scholarship,
3. maintain the $35,000 support for the *Kent and Janice Wyatt Faculty Development Fund*, and
4. maintain the $22,000 increase in the University Relations budget.

The Foundation is committed to aligning fund raising efforts with the needs of the University. To facilitate the alignment the Foundation will:

1. meet in specially called sessions of the Executive Board of Directors with the University President a minimum of once a year to give greater attention to the understanding of University needs and priorities, and
2. conduct a one-day collaborative strategic planning session in November 2006 involving the Foundation’s Executive and Trusteeship committees and University personnel to review the Foundation’s Strategic Plan.

Additional expected outcomes for 2005-06 include:

1. establishing ten new scholarships for needy and deserving students (Goal 10),
2. increasing *The Delta State Fund* unrestricted giving to $150,000,
3. increasing the alumni participation percentage rate in the Fund by 5%
4. enrolling five new members in *The Quadrangle Oak Society* planned giving club, and
5. distributing and reviewing annually the Foundation’s Strategic Plan.
Mission Statement

The mission of the DSU Alumni Association is:
1. To perpetuate the memories of university life;
2. To provide a medium through which interest in DSU may be promoted;
3. To assist in establishing alumni chapters;
4. To bind the alumni into a united fellowship working together for the advancement of the University;
5. To serve as a link between the University and its alumni; and
6. To act as a service organization for former Delta State students.

The Delta State University Strategic Plan: 2001-2005 emphasized the need for “Community and Tradition Building” on pages 52 and 53 of the Strategic Plan.

At its annual Homecoming meeting on October 2002 the DSU Alumni Association Board of Directors, under the leadership of Arthur Johnston, voted to restructure the organization so as to:
(a) benefit from a strong committee structure, (b) ensure full participation at meetings and (c) further specific goals aligned with the University’s Strategic Plan.

It was proposed that the Association become more involved in campus and University affairs. Visibility will be increased through the involvement of board members and officers and other alumni in University events, issues, decisions, and planning.

Specific reference to enhancing the University's relationship with alumni (pp.52-53 Strategic Plan) included the following recommendations, which are also aligned with University Goals:

1. Continue to develop a prospect list of alumni donors by providing necessary technology to maintain and update donor lists and install the recently purchased Banner Web for Alumni (Goal 14)

2. Improve database for alumni effort by providing needed technology and manpower to maintain and update existing database (Goal 6).

3. Investigate alumni organizations/databases/newsletters for each academic department and conduct cost-benefit study to determine feasibility of each academic department providing this function (Goal 15).

4. Expand efforts to maintain contact with and track alumni through job placement.

Other recommendations include the following:

5. Involve alumni in recruiting (Goal 15).

6. Publish a new alumni directory every five years.
**Action Plan**

In October 2002 the Alumni Association adopted the below objectives and goals, which are correlated with the University’s Strategic Plan:

I. Objectives

The Board and the Association will be:

A. **Restructured.** The Association’s Board of Directors will be restructured so as to (1) ensure full participation at meetings, (2) further the specific goals listed below (which incorporate the objectives recently outlined by the Executive Director in his Performance Review and in the Institutional Advancement Plan appended thereto).

B. **Visible.** The Association will be more involved in campus and university affairs. Visibility will be increased by increasing the involvement of board members and officers and other alumni in university events, issues, decisions and planning.

C. **Significant.** More matters of significance concerning campus and university affairs will be brought before the board. The role of the board in acting on or simply ratifying matters of campus-wide importance will be expanded. At the same time, the mentality of the board will be altered into an initiator of ideas rather than a mere receiver (active board vs. passive group).

II. Goals:

- **GOAL 1.** Develop or improve communication and information management.

- **GOAL 2.** Increase alumni involvement in the life and support of the university (Goal 15).

- **GOAL 3.** Expand the university’s presence locally, regionally and nationally (Goal 7).

- **GOAL 4.** Develop an effective legislative affairs strategy and carry out advocacy for the university when called upon (Goal 7).

- **GOAL 5.** Increase membership by at least ten percent (10%), excluding 2003 and 2004 graduates (Goal 15).

- **GOAL 6.** Structure a revenue-producing program designed to increase our financial status and fund special projects as determined by the board.
Accomplishments To Date

Since the publishing of the Strategic Plan: 2001-2005, the following recommendations for the Alumni Association have been accomplished.

Goal 1  Develop and improve communication and information management

3. “Web for Alumni” launched April 1, 2004 to link directly to their classmates, the Alumni Office, and the University so that alumni are able to update personal information and make easy connections with classmates (Goal 6).

4. Established geographic e-mail distribution lists to stay in touch with alumni and to announce upcoming events in their areas (Goal 15).

5. 21,000 magazines mailed twice a year to alumni, donors, and friends (Goal 15).

Goal 2  Increase alumni involvement in the life and support of the university

1. Informed Department Chairs on how to begin a constituent group, which would offer financial support to academic areas (Goal 11).

2. Issued annual faculty survey for attending alumni meetings (Goal 2)

3. Invited faculty to attend alumni meetings (Goal 2)

4. Coordinated an on-campus Homecoming Planning Committee to plan and initiate Homecoming activities

5. Assisting in organizing academic departmental open houses at Homecoming 2005 (Goal 9)

6. Promoted the Alumni Association through radio announcements and talk shows on various events (e.g. Pig Pickin’)

7. Sold DSU logo flags to promote University visibility

8. Continued the annual $500 IAC Scholarship (Goal 10)

9. Presented 24 Hugh Ellis Walker Alumni Association Scholarships & 12 SAA Scholarships, an increase from 14 and 8 respectively (Goal 10)
Goal 3  Expand the university’s presence locally, regionally, and nationally.

1. Alumni Magazine is mailed to 21,000 alumni and friends living in the United States and several foreign countries.

2. Expanded opportunity of parent involvement by sending them the alumni magazine from names captured at Parent Orientation

3. Helped plan and worked with IHL’s College Fair (Goal 2)

4. Hosted alumni events outside of the Mississippi Delta in such areas as Memphis, New Orleans, and in North Mississippi

5. Hosted the 20th Annual Pig Pickin’ consisting of BBQ cooking teams, football pep rally, kids zone, craft vendors, bands, and lecturers and attended by 2,000 people (Goal 11 and 15)

Goal 4  Develop an effective legislative affairs strategy and carry out advocacy for the university when called upon.

1. Alumni actively involved in lobbying for higher education with legislators and other government officials (Goal 7)

2. Alumni Association’s “Legislative Affairs” Committee met with University president to discuss how alumni can assist in lobbying

Goal 5  Increase membership by at least ten percent (10%), excluding recent graduates

1. “Web for Alumni” featured in all alumni publications to link alumni directly to their classmates, the Alumni Office, and the University

2. Mailed dues notices to inactive alumni association members

3. Association’s Board of Directors mailed personnel appeal letters to graduates inviting them to join the Association

4. Mailed lifetime membership gift letters to parents of recent graduates inviting them to pay for a membership
Goal 6  
Maintain a stable financial status and fund special projects as determined by the board.

1. Improved Association’s financial procedures by setting up books into QuickBooks rather than using ledgers
2. Expenses and revenue from each event being tracked to enable Association to make better decisions
3. Received $11,000 from the MBNA Credit Card affinity program (Goal 14)
4. Received $15,000 from the DSU logo car tags sell (Goal 14)
5. Studying adding a third affinity marketing program in order to increase revenue
Delta State University Foundation, Inc.

Strategic Plan

Adopted June 2005
Foundation Strategic Plan
June 2005

GOAL I – Raise More Money

Objectives:
A. **Grow the donor database by 5% annually** – April 2006.

*Action Item:*

1. Utilize vendor to capture missing phone numbers and addresses to increase number of callable prospects for *The Delta State Fund*.
   a) Hire HEP, Inc. to screen database for phone #s, e-mails, address updates
   b) Create annual plan for database maintenance
      -conduct National Change of Address (NCOA) screening four times year
      -subscribe to “Alumni Finder” address locating service
      -publish Harris Directory in 2006 and upload data to Banner
2. Initiate a “Parents’ Fund” - March 2005
   a) Contact current parents through “The Delta State Fund” phon-a-thon
   b) Increase giving to Parents’ Fund from $8,000 to $10,000 FY06
   a) Create a stewardship plan- draft to be presented June 17, 2005
   b) Produce “Tax Statement” on fiscal year giving mailing in January
   a) Publicize giving club levels
   b) Identify top twenty prospective members of top giving clubs
6. Increase membership of the Quadrangle Oak Society by 5% - February 2006.
   a) Mail quarterly planned giving newsletter to 3,500 alumni
   b) Feature in alumni magazine articles on planned gifts
   c) Host annual Q.O.S. reception for members and prospective members
7. Reach $35M to complete the “Wings and Roots” campaign – December 2005.
   a) Identify six and seven figure prospective donors through electronic and personal screening
   b) Reorganize campaign committee for Lead Gifts
8. Increase privately funded scholarships by 30 - June 2007.
   a) Make scholarship giving a featured objective in remainder of campaign
   b) Initiate a special mailing seeking gifts to scholarships
   c) Feature scholarship articles in alumni magazine, website, and appeal letters

B. **Grow the net assets of the Endowment to $15 million** – June 2007.

*Action Item:*

1. Identify new major gift prospects for endowment gifts– February 2006.
2. Review investment policy to maximize returns
3. Gain Foundation Board approval to revise net assets goal to $19 million- June 2007.
   * Net assets as of April 2005 stand at $17 million (net assets= investments, cash, fixed assets, contributions receivables)

C. **Provide funding for two (2) additional student recruiters and implement strategies to increase retention of students** – February 2007.

*Action Item:*

1. Increase donor database by expanding student population
2. Make recruiting a featured objective in the next campaign
3. Enhance athletic department’s statewide radio network through grant up to $25,000 in FY04, which will feature student recruitment radio spots

**GOAL II – Ensure an Effective Intra-Community Communication & Collaboration**

**Objectives:**

A. *Promote collaboration among Foundation, Alumni, and University.*
   **Action Item:**
   1. Hold joint meeting with University and Alumni Association to develop a Foundation strategic plan –
   2. Schedule mid-point assessment to review Strategic Plan - February 2006

B. *Create and implement a Communication Plan* - June 2005.
   **Action Item:**
   1. Collaborate with University’s image study through Stein Communication to develop plan
   2. Conduct Alumni focus groups in Cleveland (April) and Atlanta (June)
   3. Create e-newsletter to communicate more regularly with alumni, donors, friends, and Delta State employees

**GOAL III – Expand and Develop Foundation Staff**

**Objectives:**

A. *Identify additional staff needs* - October 2005.
   **Action Item:**
   1. Create proposed organizational chart for future positions - June 2005

   **Action Item:**
   1. Hold meeting with architects/builders to determine alternatives to expansion - July 2005
   2. Collaborate with Alumni Association’s Facilities Committee on plans

C. *Increase skills and professional knowledge for greater efficiency and performance* - May 2005.
   **Action Item:**
   1. Review and rewrite job descriptions for each director level position
   2. Provide training and professional growth opportunities through seminars, workshops, and electronic communications
   3. Each director create a professional growth plan

D. *Conduct salary study to ensure salaries of staff are competitive to recruit and retain qualified employees* – June 2005.
   **Action Item:**
   1. Partner with University’s Human Resource Office to complete salary study
GOAL IV – Improve Promotions Program

Objectives:

A. Gain University support to make marketing and promotion a higher university priority – February 2005.
   Action Item:
   1. Foundation funding University’s image study by Stein Communications
   2. Enhance athletic department’s statewide radio network through grant up to $25,000 in FY04

B. Collaborate with University to determine funding responsibility for long range public relations recommendations – February 2006.
   Action Item:
   1. Work with University to secure additional funding for public relations
   2. Identify “public relations” as a featured objective in remainder of campaign

GOAL V - Ensure Efficient Operating Processes

Objectives:

A. Review and implement policies and procedures that ensure long term financial and operational stability - February 2006.
   Action Item:
   1. Add five monthly and quarterly financial reports
   2. Formalize procedures on financial internal controls to facilitate more accountability and lessen risk- August 2005

B. Review and enhance Foundation Board’s structure and operational processes - June 2006.
   Action Item:
   1. Research latest trends in Foundation Board structure and operations
   2. Collaborate with Alumni Association on overall structure and operations of Alumni-Foundation

C. Identify funding separate line items for Foundation Reserve Fund in the unrestricted budget – June 2005.
   Action Item:
   1. Redesign “unrestricted budget” report adding line item for each source of unrestricted funds
   2. Build three year operating reserve fund for Foundation’s unrestricted budget