DIVISION OF UNIVERSITY ADVANCEMENT

Strategic Plan 2019-22

UNIVERSITY of WEST FLORIDA
A NOTE FROM THE VICE PRESIDENT FOR UNIVERSITY ADVANCEMENT

In her inauguration speech, President Martha Saunders articulated that ‘by transforming UWF, we transform the region.’ The division for University Advancement has played a critical role in transforming the University of West Florida. By increasing awareness of, engagement in, and giving to UWF, the division for University Advancement opens new doors for students, alumni, faculty, staff and citizens from the Northwest Florida region and beyond.

This document provides an overview of the three year strategic plan for our division. University Advancement includes Development & Alumni Relations, the UWF Foundation, Inc. & Advancement Services, Advancement Administrative Support, UWF Historic Trust and WUWF Public Media. As a division committed to constructive innovation, we aim to break barriers, forge new pathways and improve the lives of those in the communities we serve.

Whether you are new to the University Advancement division, new to UWF, or just interested in our work, I invite you to explore the many ways you can inspire change at UWF through your patronage, your time, or your Argo Spirit.

Thanks very much,

Howard J. Reddy
University Advancement Mission

Engage key stakeholders to build affinity, inspire giving and leverage influence to support our world-class teaching and learning environment.

University Advancement Vision Statement

To create a culture of engagement and intentional giving which embraces learning, innovation and creativity.
A.D.V.A.N.C.E
*A set of principles that govern all work done in the division*

**Achieve** maximum success in growth, gifts, and improvements.

**Deliver** support and necessary resources for institutional success.

**Voice** the distinctive benefits and needs of the greater UWF community to the change makers who can assist with future growth.

**Accommodate** to the changing needs of students, staff, alumni and donors.

**Nurture** growing interest by sharing the UWF story with the world.

**Celebrate** and strengthen the unique and varied qualities of the entire UWF community locally and worldwide.

**Enhance** the region’s educational, cultural and historic experiences and opportunities.
University Advancement Goals

Over the next three years, University of West Florida Division for University Advancement will:

1. Continue to Attract Gifts in Support of the Next Capital Campaign
   - Complete a feasibility study to identify areas of need and individuals, corporations or foundations who can assist in our campaign;
   - Create a fundraising strategy which connects with donors and communicates our greatest needs;
   - Foster the donor life cycle;
   - Discover new possible areas of support.

2. Engage Stakeholders by Developing Meaningful, Mutually Beneficial Relationships
   - Actively engage campus members and communicate the structure and purpose of University Advancement;
   - Interact with stakeholders in person and through constant communications to create rapport;
   - Enhance faculty and staff affinity and giving

3. Promote Academic and Community Connectivity through Varied Resources and Centers of Learning
   - Host conferences, symposia and lecture series to amplify educational programming;
   - Provide experiential learning opportunities employing high-impact practices;
   - Create arts and culture hubs around the local region.

4. Extend Influence of the University by Creating Opportunities Which Promote Engagement and Affinity
   - Provide high-impact educational and cultural experiences;
   - Showcase UWF programming at the regional and national levels;
   - Utilize partnerships with community leaders and donors to garner support;
   - Provide alumni resources and networking opportunities.

5. Attract and Retain Exceptional Staff
   - Create viable career ladders for staff members by providing leadership opportunities, mentoring and ongoing support;
   - Provide specialized professional development opportunities;
   - Recognize and reward high performing staff members;
   - Invest strategically in human capital.

6. Enhance Technology and Skills Throughout The Division
   - Gain infrastructure and equipment to create efficiency;
   - Provide cross-divisional enhanced operations and additional skills training;
   - Offer new technical support throughout the division.
Development & Alumni Relations

The mission of Development and Alumni Relations is to engage and involve key stakeholders in order to cultivate lifelong relationships and connections to the University of West Florida.

This team aims to create opportunities to connect and maintain relationships with current and future alumni and donors; create innovative strategies to provide additional value and benefit to the UWF alumni/donor experience; and to increase the number of gifts, pledges and annual donors in support of students and programs.

Scope of Work:
- Securing private gifts
- Identifying and engaging alumni and donors
- Building a donor base
- Sharing inspiring stories of the past, present and future of UWF and our community
- Educating and building a culture of student philanthropy

Initiatives:

Discovery
- Identifies potential new donors and engage existing and past donors
- Connects with alumni and build affinity through programming

Cultivation
- Engages alumni and donors with the university
- Discovers passion points
- Delivers a variety of unique experiences that engage existing and potential donors

Solicitation
- Delivers a comprehensive solicitation strategy to include both annual, major and planned giving.
- Provides connections to university initiatives that require support

Stewardship
- Strengthens and maintains relationships between donors, alumni, students, faculty and staff through implementing a comprehensive stewardship plan.
- Delivers a variety of unique experiences that engage existing and potential donors
- Ensures consistent outreach and

2019-2022 Department Goals
- Successfully launch the quiet and public phases of the capital campaign.
- Meet or exceed annual alumni engagement goals.
- Fulfill 100% of our established yearly performance goals.
- Consistently communicate, engage and steward university donors, alumni and board members.
Foundation & Advancement Services

The mission of UWF Foundation and Advancement Services is to (1) ensure the responsible and ethical management of alumni, student, donor and financial information and dollars and (2) provide support of fundraising and engagement activities.

Scope of Work:
- Supply prospect identification and research in support of Development and Alumni Relations fundraising and friend-raising efforts
- Train and assist Development with action tracks, dashboards and general use of databases.
- Maintain systems and procedures to allow timely monthly closing for preparing various financial statements, reports and tax compliance.
- Design, operate and maintain internal controls to prevent, or detect and correct misstatements on a timely basis.

Initiatives:

Gift Processing
- Tracks donor gifts and pledges for campaigns and solicitation,
- Timely and accurately acknowledges and receipt gifts
- Assists with university events to make sure all compliance is met

Advancement Services Activities
- Reporting and database management
- Oversight and maintenance for more than 100,000 records
- Provides donor and alumni details, history, and contact information for those developing donor relationships
- Focuses on accessibility, reliability, and accountability in all reporting activities

Foundation Activities
- Stewardship of donor funds
- Portfolio management of investments and non-endowed funds
- Fiduciary services to Housing & Residence Life including monitoring bond covenants and debt service
- Manage and pay expenses for Foundation and University operations including payroll, travel, scholarships and program services
- Support the UWF Foundation Board of Directors

2019-2022 Department Goals
- Achieve a clean annual audit and comply with various federal, state and tax reporting.
- Adhere to industry, federal, state and university laws and regulations governing the collection, use, maintenance and dissemination of student, donor and financial information.
- Continue to evaluate systems and procedures to improve efficiency in Foundation activities
- Continue to improve quality of biographical and gift data by measuring data health and reviewing and enhancing internal processes.
- Continue to provide accurate metrics for surveys, research, and KPI reporting.
- Support Development and Alumni Relations in launching the capital campaign; reaching performance goals, improving metrics, identifying alumni and donors of note and engaging board members.
Advancement Administrative Support

The Advancement Administrative Support team provides planning, resource management and administrative support to the programmatic activities of the University Advancement division. This department deals with confidential information, runs a variety of reports, keeps files and records current, provides general office support and handles special projects as needed.

Scope of Work:
- Offers primary support to the University Advancement offices and staff in administrative, reception and financial functions
- Maintains meeting room and event calendars and coordinates scheduling with internal and external stakeholders
- Performs procurement tasks and serves as a liaison with vendors for needed materials and resources in the division
- Manages travel expenses and planning for donor visits, professional development activities and other events throughout the division
- Creates recurring and special reports for board meetings, staff meetings and cabinet meetings
- Provides executive administrative support to UA executive leadership and governing support to the UWF Foundation Board of Directors

Initiatives:

Record Keeping
- Maintains records of donors and Foundation Board meetings
- Manages financial transactions including P-card purchases, budget and travel, check requests, travel vouchers, proposals and correspondence

Preparation
- Manages and coordinates events and meetings by scheduling, generating agendas, preparing meeting materials, reserving rooms, inviting attendees and booking resources/catering, as needed.
- Organizes and prepares mail attendee lists for Development, Alumni and Foundation events and initiatives.

Communication
- Organizes and disseminates communication for various division and department events
- Disperses vital information to internal and external stakeholders in the form of updates and reminders

2019-2022 Department Goals
- Maintain UWF Foundation Inc. website and document libraries
- Streamline processes between administrative support and other advancement departments
- Gain infrastructure efficiency through process development and implementation
- Strengthen administrative support to Development & Alumni Relations staff assisting departments in goal achievement
- Minimize hard copy file storage by utilizing acceptable record retention/scanning processes
- Setup e-file storage system where allowable
UWF Historic Trust

The UWF Historic Trust is an emerging pedagogical and cultural ecosystem which functions as a public and educational institution for the enrichment and benefit of the university and community. The UWF Historic Trust is a multifunctional organization, operating an archive, research, preservation, and museum facility with local connections and a global reach.

Scope of Work:

- Operates and maintains 32 historic buildings, museums, and archaeological sites.
- Curates engaging exhibitions that address and amplify important cultural, historical and artistic narratives.
- Designs interactive and dynamic public programs focusing on art and historical enrichment including educational programs and classes, living history interpretation, lectures, gallery talks, film screenings, performances and symposia.

Initiatives:

Education

- Produces and presents classes, conferences, exhibitions and lecture series for local and national audiences.
- Provides experiential learning opportunities and high-impact practices for UWF students through departmental partnerships and academic programming.

Outreach

- Engages in meaningful community outreach through partnerships and events.
- Assists with the needs of the greater community by providing experiences and resources otherwise unavailable to our local community.

Preservation

- Collects, preserves and interprets historical, cultural, and aesthetic objects.
- Staff assistance of other cultural and heritage organizations with collections best practices.

2019-2022 Department Goals

- Develop brand/identity cohesion for both external and internal stakeholders that highlights our role as a cultivator of campus and community connectivity.
- Conceptualize, develop and implement a strategic plan for visitor experience that aligns with best practices and includes communications and marketing, digital presence, interpretation of collections, exhibition curation, educational and public programs and site-wide wayfinding.
- Plan, create and promote a makerspace in the Museum of Commerce which incorporates and utilizes spaces for STEAM works from various university and community members.
WUWF Public Media

WUWF Public Media provides local, national and international news, music and local public affairs programming through broadcast and multiple digital platforms which promote enlightened and engaged thinking to the citizens in the surrounding areas and beyond.

WUWF aims to apply research and best journalistic practices in developing a comprehensive multi-platform regional news service capable of moving public service and audience engagement to the next level.

Scope of Work:
- Provides local, national and international news, music and local public affairs programming through multiple platforms
- Identifies and pursues strategic community partnerships
- Provides a platform for UWF faculty to share academic research with the general public

Initiatives:

Programming
- Continues to collaborate with UWF faculty in the creation of program content through interviews and features.
- Meets and exceeds the highest standards of public service in journalism and cultural expression.

Giving Initiatives
- Develops a legacy giving action plan.
- Applies research and best practices to maximize the efficiency and effectiveness of resource acquisition.
- Earns revenue to assure sustained growth of the organization.

Outreach & Engagement
- Ascerts regional issues of importance.
- Pursues strategic partnerships to provide enhanced programming and community support.

Critical Emergency Infrastructure
- Assures continuity of operations in times of emergencies.
- Performs annual equipment proof of performance to ensure reliability of broadcast infrastructure.
- Remains active in state association of public media to ensure continued support of operations.

2019-2022 Department Goals
- Hire a Managing Editor to oversee and coordinate the efforts of the WUWF news team in adopting a new approach to enterprise journalism
- Conduct two annual membership campaigns, fiscal and calendar year-end campaigns, and corporate support solicitation with the goal of increasing revenue 5% annually
- Develop and implement a legacy endowment planned giving campaign
- Continue to expand news coverage and outreach activities to encompass the counties of Okaloosa and Walton
- Continue to enhance community engagement through RadioLive concerts, holiday concerts, and management of the Great Gulfcoast Arts Festival Mainstage