



**June 30, 2011**

## **Educational Support and Administrative Review**

**University Advancement**

**Alan G. Medders**  
Vice President

## Overview of Department

The Office of University Advancement supports the mission of the University by securing gifts for all institutional programs and priorities, provides acknowledgement and stewardship for all contributions both current and endowed funds, communicates information and news-related information internally and externally which promotes the University and stays connected to alumni, friends, and the community at large through events, programs, and multiple levels of communications.

### **Goals and objectives of the department/area**

The Office of Advancement has made significant progress in several important areas over the past five years. All of these goals and objectives did not exist prior to July, 2007 when a true University Advancement model was created and implemented at the University. In 2007, the staff consisted of a Director of Annual Giving, Director of Alumni and two support staff. In addition, there was an Office of Public Relations with a Director and one support staff, and an Office of Publications with two graphic designers, the University photographer and one support staff.

**Goal One - Build a new University Advancement Division:** The first task was to combine the Office of Publications with the Office of University Relations and create the Office of University Communications under University Advancement.

**Goal Two - Hire additional fundraising staff:** Besides the former Vice President who had oversight of Advancement as well as Campus Facilities, the only fundraiser was the Director of Annual Giving. At the time, the Director of Alumni Relations' position had been primarily a friend-raising position. Through several promotions and new hires between 2007 and 2009, a new fundraising team was developed. By 2009, there was a Director of Annual Giving, Director of Major Gifts, Director of Planned Giving, Director of Corporate & Foundation Relations, Director of Grant Programming and Development, and a Coordinator of Endowed Scholarships. The Director of Alumni position emerged as more of a fundraising position as well. Including the Vice President for Advancement this provided seven full-time fundraisers on the road.

**Goal Three – Develop new Marketing and Branding Image:** In the spring of 2008, Mindpower Marketing Firm, Atlanta, GA was hired to create a new image and brand for UNA. Out of this new branding emerged a new University logo and tagline – “History in the Making.” With this new logo and brand, the University changed all public material, developed new admissions material, and launched a television marketing campaign for the past three years.

**Goal Four – Established an annual fundraising goal of \$3 Million:**

2005 – 2006	\$1,095,693
2006 – 2007	\$1,446,965
2007 – 2008	\$2,362,976
2008 – 2009	\$1,707,252
2009 – 2010	\$2,547,616

2010 – 2011 contributions are on track to reach and exceed the \$3 Million goal.

**Goal Five – Develop comprehensive fundraising platform:** It was imperative to develop written, web-based fundraising materials and programs to inform potential donors of the institutional needs for support. Each fundraising officer was responsible for working with University Communications in developing material to enhance their particular area. In addition, Blackbaud, the database management system for alumni and donor records, was expanded to allow for on-line giving, electronic fund transfer withdrawals from donor personal accounts and payroll deduction. One example of these new initiatives is in the area of Planned Giving. The University hired the first Director of Planned Giving then rebranded the program as the Courtview Society, developed a quarterly hardcopy and electronic newsletter, worked with the Stelter Company, a nationally-recognized full service Planned Giving service provider, to develop an informative and interactive website, produced hardcopy material on various donor planned-giving options and established a planned-giving Advisory Council which meets twice a year.

**Goal Six – Develop current and endowed scholarship distribution model and donor stewardship process:** In 2007, the University was distributing only \$231,000 in endowed scholarship distributions. Several processes were developed to increase these distributions for student scholarships. First, the University of North Alabama Foundation created a new investment and spending policy which guided a higher and more constant rate of distribution for scholarships. Second, the Coordinator for Endowed Scholarships began working directly with Student Financial Services to ensure the funds were getting distributed appropriately and timely. Third, endowed scholarship donors were informed annually of the dollar amount of their fund and the students that received the scholarships. And fourth, an Endowed Scholarship Appreciation Dinner was created for the University to express its “thank you” for donors that had established endowed funds and this allowed the donors to meet the students that have received their scholarship. For academic year 2010 – 2011, \$783,767 was awarded for scholarships through endowed funds.

**Goal Seven – Increase Athletic Support:** In 2007, athletic contributions were only \$33,000. For 2009-2010, those contributions had increased to over \$268,000. In addition to increasing the financial giving in 2010, the UNA Sportsman’s Club moved the management of their funds to be administered through the UNA Foundation. This process allows for institutional oversight and Presidential control over these funds. The

Sportsman's Club annually secures an average of \$120,000 with approximately \$75,000 annually being awarded to the athletic director for administrative and scholarship support. These funds are not comingled with funds directly given to the University.

**Goal eight – Implement plan and process for University Comprehensive Campaign:**

In the summer of 2009, the Campaign Consulting Firm, Gonser, Gerber, Tinker and Stohr, was employed to serve as counsel in planning and developing a comprehensive campaign for the University. The first phase of the audit was to evaluate the staff, conduct a donor-base analysis on current giving patterns, evaluate current giving platforms, and the communications office for publication production. Once it was determined that there was sufficient staff and resources to be successful, the second phase was to conduct a Readiness Study. This readiness study was conducted during the winter and spring of 2011 and a final report will be presented to the University in September 2011.

Department/Area Evaluation

Each year, the Office of Advancement develops annual goals and objectives for each program office and area. Below are the annual goals and objectives for each area in the Advancement Office as they existed during that year.

**2007-2008**

- Employ Web Master
- Employ Director of Annual Giving
- Employ Director of Grant and Foundation Relation
- Employ Administrative Support
- Develop new University Webpage
- Develop new Marketing & Branding Strategy
- Increase external presence in the community and state
- Add 500 new donors
- Work with Athletic Director and Director of Sportsman Club to increase fundraising for Corporate Sponsorships
- Implement fundraising plan for new Science Building
- Implement fundraising and marketing plan Culinary program
- Increase alumni giving percentage to 10%
- Redesign and launch new Planned Giving program
- Secure \$1 Million in Planned Gifts
- Maintain 100 person minimum on President's Cabinet
- Secure 20 new endowed scholarships
- Increase total giving to 3,000,000
- Increase visibility and involvement of the University's Board of Alumni through new chapter development and events
- Increase the annual editions of UNA Magazine

- Increase electronic communications through e-letters
- Develop communicate network to the Deans, Chairs and Faculty on fundraising the need to increase endowed scholarships
- Design and implement Scholarship Endowment Campaign
- Develop Gift Acceptance Policies and Procedures for Advancement Division
- Work with University Relations and Admissions on new recruitment video
- Strengthen and revitalize existing alumni chapters as well as develop new chapters including departmental and international.
- Cultivate and develop a knowledgeable NAA Board with a trained core of officers and members.
- Expand and enhance alumni sponsored and co-sponsored events.
- Offer diversified activities for participation and recognition of alumni.
- Add annual special project events (for scholarship purposes).
- Allocate resources to identify all alumni and to reach them more frequently with clear, concise, cogent communication.
- Improve media relationships
- Pursue the establishment of a UNA NAA endowment.
- Explore new UNA NAA affinity programs.
- Establish an annual budget.
- Increase individual alumni membership contributions by 10% per year.
- Seek corporate alumni connections/matching funds.
- Provide support for fundraising events of the University.
- Strengthen and revitalize existing alumni chapters as well as develop new chapters including departmental and international.
- Cultivate and develop a knowledgeable NAA Board with a trained core of officers and members.
- Expand and enhance alumni sponsored and co-sponsored events.
- Offer diversified activities for participation and recognition of alumni.
- Add annual special project events (for scholarship purposes).
- Allocate resources to identify all alumni and to reach them more frequently with clear, concise, cogent communication.
- Improve media relationships
- Pursue the establishment of a UNA NAA endowment.
- Explore new UNA NAA affinity programs.
- Establish an annual budget.
- Increase individual alumni membership contributions by 10% per year.
- Seek corporate alumni connections/matching funds.
- Provide support for fundraising events of the University.
- Acquire \$50,000 in new scholarship fund pledges
- Acquire \$50,000 for capital campaign projects
- Obtain 10 new donors
- Implement 1 endowed scholarship

- Attend one major gifts conference
- Acquire \$50,000 in operating funds
- Prepare and/or acquire planned giving materials and make them available in print and on webpage
- Inventory existing Legacy Society by personally visiting all known members and eliciting information about their estate plans adequate to estimate value of future bequests
- Double membership in Legacy Society by identifying currently unknown individuals who have included the University in their estate plans
- Conduct at least one professional development seminar on campus for local lawyers, accountants and trust officers
- Secure \$1,000,000 in new planned gifts

### **2008-2009**

- Complete implementation new University Webpage
- Develop new marketing & branding strategy with new logo and tag line
- Increase external presence in the community and state
- Add 500 new donors
- Work with Athletic Director and Director of Sportsman Club to increase fundraising for corporate sponsorships, on-line giving options, new web page, and accounting
- Implement fundraising plan capital projects
- Increase alumni giving percentage to 10%
- Expand President's Cabinet to 150 members
- Secure 20 new endowed scholarships
- Increase total giving to 3,000,000
- Continue to increase visibility and involvement of the University's Board of Alumni through new chapter development and events
- Increase alumni e-letters to monthly status once the "OnLion" community is implemented
- Assign Advancement Officers as Liaisons to College Deans to network and develop fundraising objectives
- Develop New Grant Writing Policies and Procedures for the University and Foundation
- Meet quarterly with the Dean of the College of Education as the Advancement Liaison
- Host 15 state and regional alumni chapter meetings
- Cultivate and develop a knowledgeable NAA Board with all the fundraising opportunities of the entire Advancement Division
- Expand at least 4 new alumni sponsored events
- Develop 5 new Chapter sites

- Work with Associate Provost for International Programming to develop International
- Alumni Chapter
- Offer diversified activities for participation and recognition of alumni
- Initiate the “OnLion” Alumni Web Community
- Establish 3 new UNA NAA Chapter endowments
- Explore and implement new UNA NAA affinity programs
- Increase alumni giving percentage to 10% per year
- Seek corporate alumni connections/matching funds
- Expand Alumni events at Homecoming
- Conduct 125-175 donor visits
- Meet quarterly with the Dean of the College of Arts & Sciences as the Advancement Liaison
- Secure \$500,000 in new alumni gifts
- Identify research and rank the Top 50 major gift donors.
- Acquire \$50,000 for capital campaign projects
- Acquire \$50,000 for restricted funds; i.e. Band travel, uniforms & President’s Cabinet
- Secure corporate sponsor – LIVE LIONS (\$25,000 - \$30,000 annually)
- Obtain 10 new donors
- Implement 3 endowed scholarship
- Attend one major gifts conference
- Work with the Alumni Office to develop an International Alumni Program
- Meet quarterly with the Dean of the College of Nursing as the Advancement Liaison
- Secure \$500,000 in gifts
- Conduct 125-175 donor visits
- Continue to prepare and/or acquire current planned giving materials and make them available in print and on webpage
- Continue and expand quarterly Courtview Society newsletter
- Host inaugural Courtview Society Appreciation Luncheons
- Identifying currently unknown individuals who have included the University in their estate plans
- Conduct at least one professional development seminar on campus for local lawyers, accountants and trust officers
- Conduct one seminar for the UNA/NAA Board on planned giving
- Hold a Planned Giving/Estate Planning seminar for UNA faculty and staff
- Conduct local Planned Giving/Estate Planning seminars for local organizations
- Secure 10 new planned gifts or \$500,000
- Develop targeted planned giving appeals; i.e. Charitable Gift Annuities, Charitable Remainder Trusts and Will & Bequest

- Secure 5 new endowed scholarships utilizing the final year “teaching for free” model.
- Conduct a total of 100 visit including 20 stewardship visits with current Courtview Society members
- Meet quarterly with the Dean of the College of Business as the Advancement Liaison
- Establishing Parent Giving Council → Program
- Bring Faculty/Staff to 85% participation level
- Establish student giving program (have colleges compete)
- Get Greeks (alumni giving) funneled through UNA Foundation
- Secure \$100,000 through Phonathon
- Secure \$100,000 for unrestricted Scholarship Fund
- Expand On-Line Solicitation “Purple Goes Green” Initiative
- Conduct 125-175 visits with current & perspective donors
- Work with Alumni Relations to help increase individual alumni giving percentage to 10%
- Meet quarterly with the Dean of the College of Education as the Advancement Liason
- Conduct 125 – 175 visits (alumni, corporations, foundations)
- 12 – 20 per months & 3-5 per week
- Develop 30 relationships with corporate or private foundations
- “Increase” UNA’s matching gift partners and educate UNA alumni and friends of the gift match opportunities through their companies
- Develop Corporation Gift Match webpage
- Secure \$500,000 in new corporate & foundation gifts
- Develop New Grant Writing Policies and Procedures for the University and Foundation
- Meet quarterly with the Dean of the College of Business as the Advancement Liaison
- Work with Corporate & Foundation to write and submit 20 Grants
- Secure \$500,000 in new support
- Assist all Advancement Officers in the preparation and writing of a Gift Proposal
- Develop New Grant Writing Policies and Procedures for the University and Foundation
- Meet quarterly with the Dean of the College of Arts & Sciences as the Advancement Liaison
- Build collaborative and effective scholarship award matrix to work with Financial Student Service, Admission and the Business Office
- Work with Wachovia & Patterson & Price to establish all new scholarship funds
- Work with Wachovia & Patterson & Price to allocate end-of-the calendar fund balances and determine scholarship awards for the upcoming year
- Ensure all endowed scholarships are awarded in a timely manner



- Distribute scholarship awards and fund balances to existing donor/s or their family or representative.
- Secure 20 new endowed scholarships or \$200,000 in new funds
- Make 75-100 donor visits
- Continue utilizing the University Marketing Team (UMT) -- represented by advancement, alumni relations, admissions, athletics, academics -- in the allocation of resources, prioritizing University marketing strategies, and developing new advertising opportunities
- Coordinate all Marketing Efforts through the Office of University Communications and UMT
- Develop Media Campaign for television marketing plan
- Complete new Admissions Video
- Lay the marketing foundation for an upcoming comprehensive fundraising campaign
- Continue to enhance the new UNA Web site as a key component of the university's new comprehensive marketing campaign
- Develop easy and efficient ways for Colleges & Departments to develop mini-PR efforts
- Build positive, effective relations between Shoals media and the new communications director
- Meet with news editors and directors from Huntsville, Birmingham, and other regional and national news media, building strong relations between the media and UNA
- Continue to highlight more academic news feature stories as well as the standard hard-news stories
- Closely monitor and analyze UNA's appearances in the news media
- Prepare a crisis communications plan
- Host a Media Appreciation luncheon
- Assist campus in utilizing the marketing and branding cornerstones for University materials
- Fulfill requests from campus community for quality photographs and artwork
- Examine all requests for artwork and photographs to concentrate efforts of advancement and increase efficiency of Publications staff
- Continue to refine timelines and priority listings for cyclical projects
- Implement the "Job Tracking System" and educate the campus community of the processes
- Develop successful ftp site including secure "sharing" methods of photos, graphics, and information for inter-campus and off-campus media
- Begin the development of comprehensive campaign design and material
- Complete implementation of the new University Webpage
- Research/implement a web management system for self-help; train how to use
- Establish an intranet for campus only (Ex. PDFs, classified ads, HR forms)

- Purchase a system to archive images; make it accessible to campus community on an as-needed basis
- Develop more creative, edgy, and artistic images; educate campus regarding GOOD images to energize our look
- Learn photo imaging software programs
- Find a solution to labor-heavy job-related functions (learning new programs in above item)

## **2009-2010**

- Host 15 state and regional alumni chapter meetings
- Cultivate and develop a knowledgeable Alumni Association Board with all of the fundraising opportunities of the entire Advancement Division
- Expand at least four new alumni sponsored events
- Develop five new Chapter sites
- Work with Associate Provost for International Programming to develop International Alumni Chapter
- Offer diversified activities for participation and recognition of alumni
- Initiate the “OnLion” Alumni Web Community
- Establish three new UNA Alumni Association Chapter endowments
- Explore and implement new UNA Alumni Association affinity programs
- Increase alumni giving percentage to 10% per year
- Seek corporate alumni connections/matching funds
- Expand Alumni events at Homecoming
- Conduct 125-175 donor visits
- Meet quarterly with the Dean of the College of Arts & Sciences as the Advancement Liaison
- Secure \$500,000 in new alumni gifts
- Conduct 125–175 visits (alumni, corporations, foundations) 12–20 per Months & 3-5 per week
- Develop 30 relationships with corporate or private foundations
- “Increase” UNA’s matching gift partners and educate UNA alumni
- Develop Corporation Gift Match webpage
- Secure \$500,000 in new corporate & foundation gifts

Develop New Grant Writing Policies and Procedures for the University and Foundation

- Meet quarterly with the Dean of the College of Business as the Advancement Liaison
- Research, and rank the Top 50 major gift donors
- Acquire \$50,000 for capital campaign projects
- Acquire \$50,000 for restricted funds
- Secure corporate sponsor for the Live Lions (\$25,000 - \$30,000 annually)
- Obtain ten new donors
- Implement three endowed scholarships
- Attend one major gifts conference
- Work with the Alumni Office to develop an International Alumni Program
- Meet quarterly with the Dean of the College of Nursing
- Secure \$500,000 in gifts
- Conduct 125-175 donor visits
- Continue to prepare and/or acquire current planned giving materials and to make them available in print and on webpage
- Continue and expand quarterly Courtview Society newsletter (In consultation with Stelter), enhanced my webpage, initiated monthly emails & quarterly postcards, changed to two Courtview Society newsletters)
- Host inaugural Courtview Society Appreciation Luncheon
- Identifying currently unknown individuals who have included the University in their estate plans
- Conduct at least one professional development seminar on campus for local lawyers, accountants, and trust officers
- Meet individually with members of UNA Board for discussion of their role in planned giving
- Hold a Planned Giving/Estate Planning seminar for UNA faculty and Staff
- Conduct local Planned Giving/Estate Planning seminars for Institute for Learning in Retirement
- Secure 10 new planned gifts or \$500,000
- Develop targeted planned giving appeals; i.e. Charitable Gift Annuities Charitable Remainder Trusts, Wills and Bequests
- Seek Faculty Senate endorsement of the **PRFSR** program
- Secure 5 new endowed scholarships utilizing the **PRFSR** program
- Conduct a total of 100 visit including 20 stewardship visits with current Courtview Society members
- Meet quarterly with the Dean of the College of Business as the Advancement Liaison
- Incorporate our scholarship matrix with the information in Student Financial Services.
- Ensure all endowed and current use scholarships are awarded.

- Organize information to maximize our donor stewardship and scholarship distribution.
- Solicit or cultivate approximately one hundred and twenty donor visits.
- Work with Fundraising Staff to establish twenty-five new endowed scholarships, or a minimum of \$750,000 for endowed scholarships.
- Modify the Advancement-Endowed Scholarship webpage to include more information.
- Coordinate with the University Gala Awards Committee to combine the current University Gala with the Foundation Scholarship Banquet.
- Continue collaborative efforts with the Business Office and Student Financial Services.
- Continue collaborative efforts with Patterson & Prince and Wachovia.
- Pursue more training for Argos.
- Work with Graphic Standards and Web Communications Committee to finalize and implement official graphic standards for the university.
- Continue to develop and execute campus-wide marketing efforts, such as television campaigns, Facebook ads, iPhone and Smartphone applications and so on.
- Help admissions develop several new collateral materials, including a new travel piece and a new online and DVD video.
- Develop a campaign case statement.
- Continue to build positive, effective relations between local, regional, state, and national media
- Continue to highlight compelling university news stories through news releases, story pitches, expert sources, and even video news releases.
- Closely monitor and analyze the university's appearances in the news media.
- Prepare a crisis communications plan.
- Ensure Administrative Assistant's successful transition into her new position.
- Further develop the new jobs system to funnel all job requests and outgoing and incoming proofs through the front desk.
- Assist campus in utilizing the marketing and branding cornerstones for university materials.
- Fulfill requests from campus community for quality photographs and artwork.
- Examine all requests for artwork and photographs to concentrate efforts of advancement and increase efficiency of design staff.
- Continue to refine timelines and priority listings for cyclical projects.
- Offer more online Word templates, including certificates and programs, for use by departments throughout campus.
- Implement a Web content management system.
- Evolve the university Web site into an updated design.
- Purchase a system to archive images, making the system accessible to the campus community on an as-needed basis.

- Budget Shannon's time wisely to allow her to capture true marketing images as opposed to snapshots.
- Continue to learn photo imaging software programs.

Facilities and Resources that address the adequacy of resources and support services to support the goals and objectives of the department/area

In the fall of 2007, the University completed a \$1.3 million renovation of Roger's Hall, the home of the office of University Advancement. During the renovation, new space was added in the basement to allow for the Offices of Public Relations and Publications to move from separate facilities into the new single space making the transition to University Communication seamless. In addition to the new space in the basement for University Communications, there is also a room dedicated for 15 calling stations for the Phonathon and Guest Room for handicap accessibility. As part of the fundraising efforts, a \$300,000 maintenance funds was established for ongoing upgrades and improvements.

Staff

See Attached Organizational Charts reflecting the Advancement Staff in 2007 and 2011 and the changes that have been made during that period.

Attachment A and Attachment B

Achievements

Below are the achievements of the Goals and Objectives for the Office of Advancement and the program areas within the Division

**2007-2008**

- Employ Web Master  
**Completed**
- Employ Director of Annual Giving  
**Complete**
- Employ Director of Grant and Foundation Relation  
**Complete**
- Employ Administrative Support  
**Complete**
- Develop new University Webpage  
**Complete/Ongoing**
- Develop new Marketing & Branding Strategy  
**In Progress**
- Increase external presence in the community and state  
**In Progress**

- Add 500 new donors  
**Complete**
- Work with Athletic Director and Director of Sportsman Club to increase fundraising for Corporate Sponsorships  
**Complete/Ongoing**
- Implement fundraising plan for new Science Building  
**In Progress**
- Implement fundraising and marketing plan Culinary program  
**In Progress**
- Increase alumni giving percentage to 10%  
**In Progress**
- Redesign and launch new Planned Giving program  
**Complete/Ongoing**
- Secure \$1 Million in Planned Gifts  
**Complete**
- Maintain 100 person minimum on President's Cabinet  
**Ongoing**
- Secure 20 new endowed scholarships  
**In Progress/Ongoing**
- Increase total giving to 3,000,000  
**In Progress**
- Increase visibility and involvement of the University's Board of Alumni through new chapter development and events  
**Complete/Ongoing**
- Increase the annual editions of UNA Magazine  
**Complete**
- Increase electronic communications through e-letters  
**Complete/Ongoing**
- Develop communicate network to the Deans, Chairs and Faculty on fundraising the need to increase endowed scholarships  
**Complete/Ongoing**
- Design and implement Scholarship Endowment Campaign  
**Complete**
- Develop Gift Acceptance Policies and Procedures for Advancement Division  
**Complete**
- Work with University Relations and Admissions on new recruitment video  
**In Progress**
- Strengthen and revitalize existing alumni chapters as well as develop new chapters including departmental and international.  
**Complete/Ongoing**
- Cultivate and develop a knowledgeable NAA Board with a trained core of officers and members.  
**Ongoing**

- Expand and enhance alumni sponsored and co-sponsored events.  
**Complete/Ongoing**
- Offer diversified activities for participation and recognition of alumni.  
**In Progress**
- Add annual special project events (for scholarship purposes).  
**Complete/Ongoing**
- Allocate resources to identify all alumni and to reach them more frequently with clear, concise, cogent communication.  
**Complete/Ongoing**
- Improve media relationships  
**Complete/Ongoing**
- Pursue the establishment of a UNA NAA endowment.  
**In Progress**
- Explore new UNA NAA affinity programs.  
**In Progress**
- Establish an annual budget.  
**Complete**
- Increase individual alumni membership contributions by 10% per year.  
**In Progress**
- Seek corporate alumni connections/matching funds.  
**Ongoing**
- Provide support for fundraising events of the University.  
**Ongoing**
- Prepare and/or acquire planned giving materials and make them available in print and on webpage  
**Complete/Ongoing**
- Inventory existing Legacy Society by personally visiting all known members and eliciting information about their estate plans adequate to estimate value of future bequests  
**In Progress**
- Double membership in Legacy Society by identifying currently unknown individuals who have included the University in their estate plans  
**In Progress**
- Conduct at least one professional development seminar on campus for local lawyers, accountants and trust officers  
**In Progress**

### **2008-2009**

- Complete implementation new University Webpage  
**Complete/Ongoing**
- Develop new marketing & branding strategy with new logo and tag line  
**Complete/Ongoing**

- Increase external presence in the community and state  
**In Progress**
- Add 500 new donors  
**In Progress**
- Work with Athletic Director and Director of Sportsman Club to increase fundraising for corporate sponsorships, on-line giving options, new web page and accounting  
**Complete/Ongoing**
- Implement fundraising plan capital projects  
**In Progress**
- Increase alumni giving percentage to 10%  
**In Progress**
- Expand President’s Cabinet to 150 members  
**In Progress**
- Secure 20 new endowed scholarships  
**Complete**
- Increase total giving to 3,000,000  
**In Progress**
- Continue to increase visibility and involvement of the University’s Board of Alumni through new chapter development and events  
**Complete/Ongoing**
- Increase alumni e-letters to monthly status once the “OnLion” community is Implemented  
**Complete**
- Assign Advancement Officers as Liaisons to College Deans to network and develop fundraising objectives  
**Complete/Ongoing**
- Develop New Grant Writing Policies and Procedures for the University and Foundation  
**In Progress**
- Meet quarterly with the Dean of the College of Education as the Advancement Liaison  
**In Progress/Ongoing**
- Conduct 125 – 175 visits (alumni, corporations, foundations)  
12 – 20 per Months & 3-5 per week  
**In Progress/Ongoing**
- Develop 30 relationships with corporate or private foundations  
**In Progress/Ongoing**
- “Increase” UNA’s matching gift partners and educate UNA alumni opportunities through their and friends of the gift match companies  
**In Progress/Ongoing**
- Develop Corporation Gift Match webpage  
**Complete**



- Secure \$500,000 in new corporate & foundation gifts  
**In Progress/Ongoing**
- Develop New Grant Writing Policies and Procedures for the University and Foundation  
**In Progress**
- Meet quarterly with the Dean of the College of Business as the Advancement liaison  
**In Progress/Ongoing**
- Work with Corporate & Foundation to write and submit 20 Grants  
**In Progress/Ongoing**
- Secure \$500,000 in new support  
**In Progress/Ongoing**
- Assist all Advancement Officers in the preparation and writing of a Gift Proposal  
**In Progress/Ongoing**
- Develop New Grant Writing Policies and Procedures for the University and the Foundation  
**In Progress/Ongoing**
- Meet quarterly with the Dean of the College of Arts & Sciences as the Advancement Liaison  
**Ongoing**
- Identify research and rank the Top 50 major gifts donors  
**Ongoing**
- Acquire \$50,000 for capital campaign projects  
**In Progress**
- Acquire \$50,000 for restricted funds  
**Complete**
- Secure corporate sponsor for the Live Lions (\$25K - \$30K annually)  
**In Progress**
- Obtain 10 new donors  
**Complete**
- Implement 3 endowed scholarships  
**In Progress**
- Attend one major gifts conference  
**Ongoing**
- Work with the Alumni Office to develop an International Alumni Program  
**In Progress**
- Meet quarterly with Dean of College of Nursing  
**Ongoing**
- Secure \$500,000 in gifts  
**In Progress**
- Conduct 125-175 donor visits

- **Ongoing**
- Continue to prepare and/or acquire current planned giving materials and to make them available in print and on webpage
- **Ongoing**
- Continue and expand quarterly Courtview Society newsletter
- **Ongoing**
- Host inaugural Courtview Society Appreciation Luncheons
- **Deferred until Spring 2010**
- Identifying currently unknown individuals who have included the University in their estate plans
- **Ongoing**
- Conduct at least one professional development seminar on campus for local lawyers, accountants and trust officers
- **Deferred until Fall 2009**
- Conduct one seminar for the UNA/NAA Board on planned giving
- **Deferred until Fall 2009**
- Hold a Planned Giving/Estate Planning seminar for UNA faculty and Staff
- **Deferred until Spring 2010**
- Conduct local Planned Giving/Estate Planning seminars for local Organizations
- **Assisted in presentation to Institute for Learning in Retirement**
- Secure 10 new planned gifts or \$500,000
- **Assisted in securing two CGA's worth \$150,000**
- Develop targeted planned giving appeals; i.e. Charitable Gift Annuities Charitable Remainder Trusts, Wills and Bequests
- **Ongoing**
- Secure 5 new endowed scholarships utilizing the final year "teaching for free" model
- **Ongoing (Two established 2008/2009, one established 2009/2010, more expected)**
- Conduct a total of 100 visit including 20 stewardship visits with current Courtview Society members
- **In Progress**
- Meet quarterly with the Dean of the College of Business as the Advancement Liaison
- **Ongoing**
- Establishing Parent Giving Council → Program -  
The council has been established and we are working on a plan of action. We are presenting it to all the parents and family members at the SOAR sessions
- **In Progress**

- Bring Faculty/Staff to 85% participation level - Barry Morris and I organized a Faculty/Staff Stewardship Committee. We are currently at roughly 20%  
**In Progress**
- Establish student giving program (have colleges compete)  
**Deferred**
- Get Greeks (alumni giving) funneled through UNA Foundation - Kappa Sigma and Sigma Chi are new Greek organizations that funnel their money through the UNA Foundation  
**In Progress**
- Secure \$100,000 through Phonathon - I am working on new initiatives for the Phonathon. This next year the phonathon will be four days a week, four hours a day  
**In Progress**
- Secure \$100,000 for unrestricted Scholarship Fund - In addition to the direct mail pieces and phonathon Rosie's Cantina is hosting a UNA Scholarship Day where 10% of total sales for that day will go to the General Scholarship Fund  
**In Progress**
- Expand On-Line Solicitation "Purple Goes Green" Initiative - The first E-appeal was sent out in October 2008 and the initiative will be in full force once On-Lion Communities is launched  
**In Progress**
- Conduct 125-175 visits with current & perspective donors - In addition to attending the alumni events, I went to Florida and met with 4 donors. I also delivered plaques and gifts to donors that were unable to attend the Donor Appreciation Dinner  
**In Progress**
- Work with Alumni Relations to help increase individual alumni giving percentage to 10% - During phonathon the callers really pushed the importance of participation over giving amount. The spring semester phonathon brought in 73 new donors with a total of \$2,429.20 of new donations  
**In Progress**
- Meet quarterly with the Dean of the College of Education as the Advancement Liaison  
**In Progress (We've had the first meeting the COE. I plan on working with the Coordinator of Endowed Scholarships, Missy Pettus, on a plan of action for increasing funds)**
- Host 15 state and regional alumni chapter meetings  
**Ongoing**
- Cultivate and develop a knowledgeable NAA Board with all of the fundraising opportunities of the entire Advancement Division  
**Ongoing**
- Expand at least four new alumni sponsored events  
**Ongoing**

- Develop five new Chapter sites  
**Ongoing**
- Work with Associate Provost for International Programming to develop International Alumni Chapter  
**In Progress**
- Offer diversified activities for participation and recognition of alumni  
**In Progress**
- Initiate the “OnLion” Alumni Web Community  
**In Progress**
- Establish three new UNA NAA Chapter endowments  
**In Progress**
- Explore and implement new UNA NAA affinity programs  
**In Progress**
- Increase alumni giving percentage to 10% per year  
**Ongoing**
- Seek corporate alumni connections/matching funds  
**Ongoing**
- Expand Alumni events at Homecoming  
**Ongoing**
- Conduct 125-175 donor visits  
**Ongoing**
- Meet quarterly with the Dean of the College of Arts & Sciences as the Advancement Liaison  
**Deferred**
- Secure \$500,000 in new alumni gifts  
**Ongoing**
- Continue utilizing the University Marketing Team (UMT); represented by advancement, alumni relations, admissions, athletics, academics, in the allocation of resources, prioritizing University marketing strategies, and develop new advertising opportunities.  
**Ongoing (Since the recent formation of the Office of University Communications, it has been discovered that this new office was charged with the same responsibilities as the UMT. With the Office of University Communications now in place, the UMT has been determined unnecessary for effective marketing strategies and advertising opportunities and allocation of resources.)**
- Coordinate all Marketing Efforts through the Office of University Communications and UMT.  
**\*See above**
- Marketing efforts through the Office of University Communications  
**Ongoing**
- Marketing efforts through the UMT  
**\*See above**

- Develop Media Campaign for television marketing plan.  
**Complete**
- Complete new Admissions Video.  
**Complete**
- Lay the marketing foundation for an upcoming comprehensive fundraising campaign.  
**Complete**
- Continue to enhance the new UNA Web site as a key component of the university's new comprehensive marketing campaign.  
**Ongoing**
- Develop easy and efficient ways for Colleges & Departments to develop mini-PR efforts.  
**Ongoing**
- Build positive, effective relations between Shoals media and the new communications director.  
**Ongoing**
- Meet with news editors and directors from Huntsville, Birmingham and other regional and national news media, building strong relations between the media and UNA.  
**Ongoing**
- Continue to highlight more academic news feature stories as well as the standard hard-news stories.  
**Ongoing**
- Closely monitor and analyze UNA's appearances in the new media.  
**Ongoing**
- Prepare a crisis communications plan.  
**In Progress**
- Host a Media Appreciation luncheon.  
**Deferred**
- Assist campus in utilizing the marketing and branding cornerstones for University materials.  
**Ongoing**
- Fulfill requests from campus community for quality photographs and artwork.  
**Ongoing**
- Examine all requests for artwork and photographs to concentrate efforts of advancement and increase efficiency of Publications staff.  
**Ongoing**
- Continue to refine timelines and priority listings for cyclical projects.  
**Ongoing**
- Implement the "Job Tracking System" and educate campus community of the processes.  
**Complete**

- Develop successful FTP site including secure “sharing” methods of photos, graphics and information for inter-campus and off-campus media.  
**Deferred (Need is for an image archiving system to house all UNA photos and other images making them available to select individuals who could easily search them by key word. The UNA photographer has found such a system, which will be included in the Office of University Communications’ budget proposal for 2009-10.)**
- Begin the development of comprehensive campaign design and material.  
**Complete**
- Complete implementation of new University Webpage.  
**Complete**
- Research/implement a web content management system for self-help; train how to use.  
**Deferred**
- Establish an intranet for campus only (Ex. PDFs, classified ads, HR forms).  
**Deferred**
- Purchase a system to archive images; make it accessible to campus community on an as needed basis.  
**Deferred (See Publications & Design point above about FTP site)**
- Develop more creative, edgy, artistic images; educate campus regarding GOOD images to energize our look.  
**Ongoing**
- Learn photo imaging software programs.  
**Ongoing**
- Find a solution to labor-heavy job-related functions (learning new programs in above item).  
**Ongoing**
- Incorporate our scholarship matrix with the information in Student Financial Services  
**Complete/Work in Progress (We have incorporated SFS information into the scholarship matrices and into the database. Approximately 95% of all agreements and information associated with such has been incorporated into the database system. However, this is a work in progress as we are meeting with all Colleges to discuss/confirm the information in the matrices)**
- Ensure all endowed and current use scholarships are awarded.  
**Work in Progress (A procedure was established to assure all endowed and current use scholarships will be awarded. However, this will be a work in progress from semester to semester)**
- Organize information to maximize our donor stewardship and scholarship distribution.

**Work in Progress (Although a large majority of the information was organized for our donor stewardship and scholarship distribution, we are working to create a procedure to maximize this goal)**

- Solicit or cultivate approximately one hundred and twenty donor visits.  
**Work in Progress (This goal was not met. I felt it necessary to organize donor information (building a strong foundation) and then begin the building process.**
- Work with Fundraising Staff to establish 25 new endowed scholarships, or a minimum of \$750,000 for endowed scholarships.  
**Work in Progress (Twenty-five new endowed scholarships were established as of the end of April 2009. We also have increased the number of Lion Match Program members from four the previous year to twenty-one members)**
- Modify the Advancement-Endowed Scholarship webpage to include more information.  
**Work in Progress (Currently working with Jeremy Britton to design a new page for the Endowed Scholarship webpage which will like with Student Financial Services, all Colleges and Athletics for donation information and applying for endowed scholarship. )**
- Coordinate with the University Gala Awards Committee to combine the current University Gala with the Foundation Scholarship  
**Complete (This year was the first year the Foundation and University partnered for the University Gala. There were over 600 scholarship recipients and approximately 150 donors. All feedback from donors was great)**
- Continue collaborative efforts with the Business Office and Student Financial Services  
**Complete/Work in Progress (We have successfully broken down many barriers to assure all scholarships will be awarded. We worked to create and accountability for the awarded scholarships. We will continue to organize the awarding and funding of the endowed scholarships)**
- Continue collaborative efforts with Patterson & Prince and Wachovia  
**Work in Progress (Although we have made great strides in narrowing the gap, we are still working to identify all funds for accuracy)**
- Pursue more training for Argos  
**Work in Progress (I talked with Dr. Holland, Kathy Robbins, and Keith Dobbs about my interest in pursuing more formal training/education for the Argos software)**

**2009-2010**

- Host 15 state and regional alumni chapter meetings  
**Ongoing**
- Cultivate and develop a knowledgeable Alumni Association Board with all of the fundraising opportunities of the entire Advancement Division  
**Ongoing (Introduced campaign initiatives, campus master plan and expectations for giving back)**
- Expand at least four new alumni sponsored events  
**Ongoing (Legislative luncheon, AMEA annual conference, Florida winter college banquet, Homecoming Reunions at Rogers Hall, facilitate women of the 50s and 70s for gatherings)**
- Develop five new Chapter sites  
**Ongoing (Currently 28 chapters)**
- Work with Associate Provost for International Programming to develop International Alumni Chapter  
**Ongoing (Established formal chapter in China)**
- Offer diversified activities for participation and recognition of alumni  
**Ongoing (Engaged alumni as VIP for Celebrity classic / participate with Summer Theatre and encourage theatre alumni to come back / alumni band and Alabama Music Educators reception for band directors / homecoming reunion groups)**
- Initiate the “OnLion” Alumni Web Community  
**In Progress (More than 1,000 signed up for OnLion, we will drive new graduates to the site and continue to increase numbers in order to build support communities)**
- Establish three new UNA Alumni Association Chapter endowments  
**In Progress (Four geographical alumni chapters are establishing endowments and currently two departmental chapters are working on that goal)**
- Explore and implement new UNA Alumni Association affinity programs  
**In Progress (An insurance affinity program will kick-off in May)**
- Increase alumni giving percentage to 10% per year  
**Ongoing (Alumni pride giving program increased by 150)**
- Seek corporate alumni connections/matching funds  
**Ongoing**
- Expand Alumni events at Homecoming  
**Ongoing (Added reunions on the lawn of Rogers Hall and concert on Spirit Hill)**
- Conduct 125-175 donor visits  
**Ongoing**
- Meet quarterly with the Dean of the College of Arts & Sciences as the Advancement Liaison  
**Ongoing**



- Secure \$500,000 in new alumni gifts  
**Ongoing**
- Continue to prepare and/or acquire current planned giving materials and to make them available in print and on webpage  
**Ongoing**
- Continue and expand quarterly Courtview Society newsletter (In consultation with Stelter, enhanced my webpage, initiated monthly emails & quarterly postcards, changed to two Courtview Society newsletters)  
**Complete**
- Host inaugural Courtview Society Appreciation Luncheon  
**In Progress**
- Identifying currently unknown individuals who have included the University in their estate plans  
**Ongoing**
- Conduct at least one professional development seminar on campus for local lawyers, accountants and trust officers  
**Deferred**
- Meet individually with members of UNA Board for discussion on their role in planned giving  
**Deferred**
- Hold a Planned Giving/Estate Planning seminar for UNA faculty and Staff  
**Deferred**
- Conduct local Planned Giving/Estate Planning seminars for Institute for Learning in Retirement  
**Ongoing**
- Secure 10 new planned gifts or \$500,000  
**Ongoing**
- Develop targeted planned giving appeals; i.e. Charitable Gift Annuities Charitable Remainder Trusts, Wills and Bequests  
**Ongoing**
- Seek Faculty Senate endorsement of the **PRFSR** program  
**In Progress**
- Secure 5 new endowed scholarships utilizing the **PRFSR** program  
**Ongoing**
- Conduct a total of 100 visit including 20 stewardship visits with current Courtview Society members  
**Ongoing**
- Meet quarterly with the Dean of the College of Business as the Advancement Liaison  
**Ongoing**
- Conduct 125–175 visits (alumni, corporations, foundations) 12–20 per Months & 3-5 per week  
**Ongoing**

- Develop 30 relationships with corporate or private foundations  
**Completed**
- “Increase” UNA’s matching gift partners and educate UNA alumni  
**Ongoing**
- Develop Corporation Gift Match webpage  
**Completed**
- Secure \$500,000 in new corporate & foundation gifts  
**Nearing Completion**
- Develop New Grant Writing Policies and Procedures for the University and Foundation  
**Deferred**
- Meet quarterly with the Dean of the College of Business as the Advancement Liaison  
**Ongoing**
- Research, and rank the Top 50 major gift donors  
**Ongoing**
- Acquire \$50,000 for capital campaign projects  
**In Progress**
- Acquire \$50,000 for restricted funds  
**In Progress**
- Secure corporate sponsor for the Live Lions (\$25,000 - \$30,000 annually)  
**Ongoing**
- Obtain ten new donors  
**In Progress**
- Implement three endowed scholarships  
**In Progress**
- Attend one major gifts conference  
**In Progress**
- Work with the Alumni Office to develop an International Alumni Program  
**Ongoing**
- Meet quarterly with the Dean of the College of Nursing  
**Ongoing**
- Secure \$500,000 in gifts  
**In Progress**
- Conduct 125-175 donor visits  
**Ongoing**
- Incorporate our scholarship matrix with the information in Student Financial Services.  
**Completed**
- Ensure all endowed and current use scholarships are awarded.  
**Complete/Ongoing (Awards are higher for the 09/10 academic year. Continue working with Colleges, Athletics and Student Financial**

**Services to ensure scholarship awards. Awards have increased from previous year)**

- Organize information to maximize our donor stewardship and scholarship distribution.  
**In Progress**
- Solicit or cultivate approximately one hundred and twenty donor visits.  
**In Progress (Due to work load, solicit or cultivate approximately fifty donor visits)**
- Work with Fundraising Staff to establish twenty-five new endowed scholarships, or a minimum of \$750,000 for endowed scholarships.  
**Ongoing (Twelve new endowed scholarships were created within the University and the Foundation. Sixteen existing endowed scholarship are now Lion Match Program participants)**
- Modify the Advancement-Endowed Scholarship webpage to include more information.  
**In Progress (All information was updated and pictures from the most recent Scholarship Recipient Dinner will be sent to Jeremy to post on or before June 4<sup>th</sup>, 2010)**
- Coordinate with the University Gala Awards Committee to combine the current University Gala with the Foundation Scholarship.  
**This goal was obtained, however the decision was made for UNAF Host an event specifically for the endowed scholarships donors and recipients. The 2009 dinner was very successful in hosting approximately 350 gifts.**
- Continue collaborative efforts with the Business Office and Student Financial Services.  
**In Progress**
- Continue collaborative efforts with Patterson & Prince and Wachovia.  
**In Progress**
- Pursue more training for Argos.  
**Discussed with UNA staff and no options are available at this time.**
- Work with Graphic Standards and Web Communications Committee to Finalize and implement official graphic standards for the university.  
**In Progress**
- Continue to develop and execute campus-wide marketing efforts, such as television campaigns, Facebook ads, iPhone and Smartphone applications and so on.  
**Ongoing**
- Help admissions develop several new collateral materials, including a new travel piece and a new online and DVD video.  
**In Progress**
- Develop a campaign case statement.  
**In Progress**

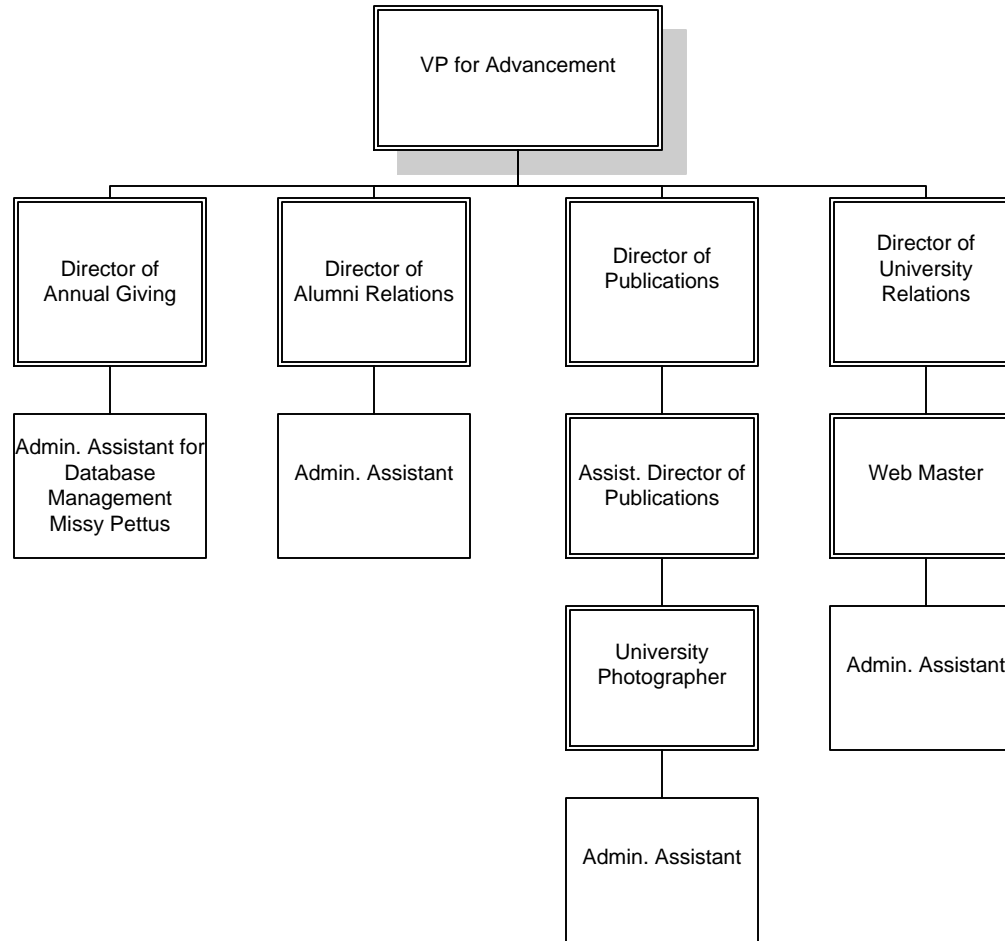
- Continue to build positive, effective relations between local, regional, state and national media  
**Ongoing**
- Continue to highlight compelling university news stories through news releases, story pitches, expert sources and even video news releases.  
**Ongoing**
- Closely monitor and analyze the university's appearances in the news media.  
**Ongoing**
- Prepare a crisis communications plan.  
**In Progress**
- Ensure Kathy's successful transition into her new position.  
**In Progress**
- Further develop the new jobs system to funnel all job requests and outgoing and incoming proofs through the front desk.  
**In Progress**
- Assist campus in utilizing the marketing and branding cornerstones for university materials.  
**Ongoing**
- Fulfill requests from campus community for quality photographs and artwork.  
**Ongoing**
- Examine all requests for artwork and photographs to concentrate efforts of advancement and increase efficiency of design staff.  
**Ongoing**
- Continue to refine timelines and priority listings for cyclical projects.  
**Ongoing**
- Offer more online Word templates, including certificates and programs, for use by departments throughout campus.  
**In Progress**
- Implement a Web content management system.  
**In Progress**
- Evolve the university Web site into an updated design.  
**Deferred (until Web content Management system is in place)**
- Purchase a system to archive images, making the system accessible to the campus community on an as-needed basis.  
**Deferred (until budget resources are available)**
- Budget Shannon's time wisely to allow her to capture true marketing images as opposed to snapshots.  
**Ongoing**
- Continue to learn photo imaging software programs.  
**Ongoing**

### Vision and Plans for the Future of the area

The Office of University Advancement will begin the implementation phase of the strategies for the Comprehensive Campaign and have the campaign as the major focus for the next five years.

# UNA Advancement Division Organizational Chart

2006-2007



# Office of University Advancement

