

University of Central Arkansas Division of Advancement

Senate Meeting
Tuesday March 13, 2018

Organizational Chart



Advancement Services



Joan Shofner – Exec. Director



The Advancement Services department collects and manages information related to our alumni, donors and prospects and administers the software programs used to manage, retrieve and analyze this data.

Alumni Association



Jesse Thill – Exec. Director



As a membership organization, the UCA Alumni Association promotes and supports UCA by encouraging lifelong pride, relationships, engagement, and financial investment among current alumni, future alumni, and friends of the University.

Development

Dr. Mary Lackie – Exec. Director



The Development department is responsible for engaging, cultivating, soliciting, and stewarding donors for annual, major, and planned gifts. These donations are used to support students, faculty and staff through various scholarships and programmatic support initiatives.

Kathy Carroll – Exec. Director



The purpose of the University of Central Arkansas Foundation, Inc., is to further the goals of the

University of Central Arkansas by securing and carefully managing private funds for the support of the University.

The Foundation solicits and manages endowment funds for scholarships, University programs, and other University needs. It also solicits and distributes restricted funds for University programs, buildings, and funds for current

Mission Statement

- Provide a lifetime impact for students by securing private support from key constituencies.

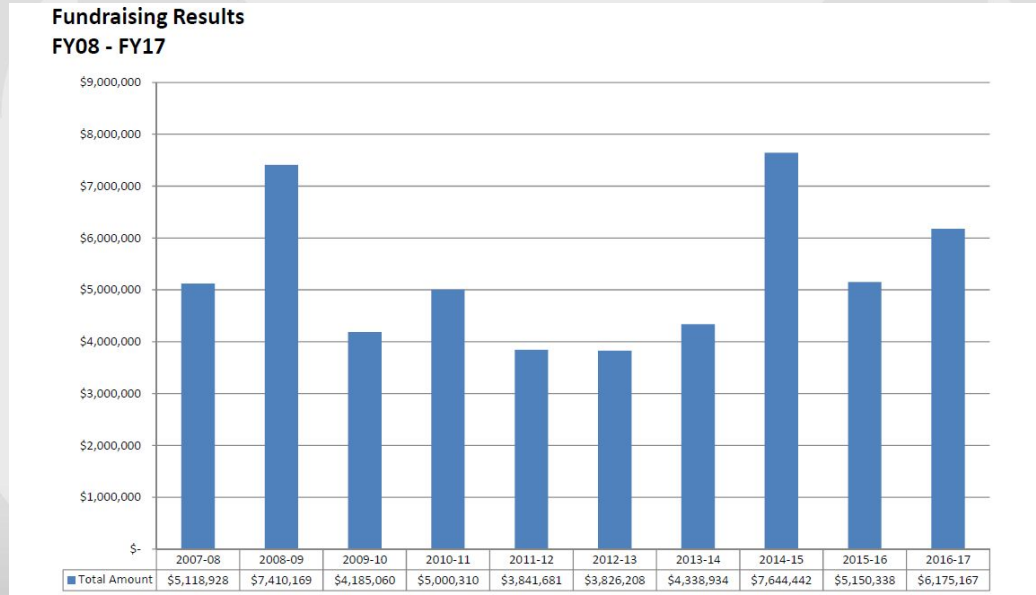
Verifiable Objectives FY18

- Raise \$6.5M
- Enhance all forms of follow-up communication
- Strategically position the President to be the face of a comprehensive capital campaign
- Prepare staff and external constituents for campaign-readiness

VO #1: Raise \$6.5M

Goal: \$6,500,000

- Currently at \$8,782,274
- 135% of money raised through 70% of year



Day of Giving



- Total Dollars Raised: \$434,286
- Total Matching Gifts: \$86,000
- Total # of Donors: 919 + students
- Gift Type (online vs non): \$146,212
- Top Performing Funds:
 - Athletics – \$111,316
 - The Conductor – \$52,251
 - *Annual Fund – \$13,378
 - Honors College – \$6,377
 - COE Enhancement – \$6,106
 - AST – \$5,834
 - Physical Therapy – \$3,981
 - CNSM Enhancement – \$3,378

VO #2: Enhance Follow-Up



Goal 1: Follow-up from UCA Foundation results in great customer service to our donors, causing them to continue to support. Follow-up from DODs results in more dollars given. Follow-up from Advancement Services results in more effective fundraisers

Goal 2: Follow-up from UCA Alumni Staff results in stronger networks among UCA alumni.

VO #3: Position the President



Goal 1: In order to successfully complete a capital campaign that raises between \$70M and \$100M, the President must be the face of the effort. This will result in student and faculty support at unprecedented levels.

Goal 2: Strengthening partnerships with corporate donors will provide internship opportunities.

VO #4: Campaign Readiness



Goal 1: A prepared faculty will only enhance the capital campaign potential and results. The more money raised, the more support our students and faculty will receive. This is where the relationships lie.

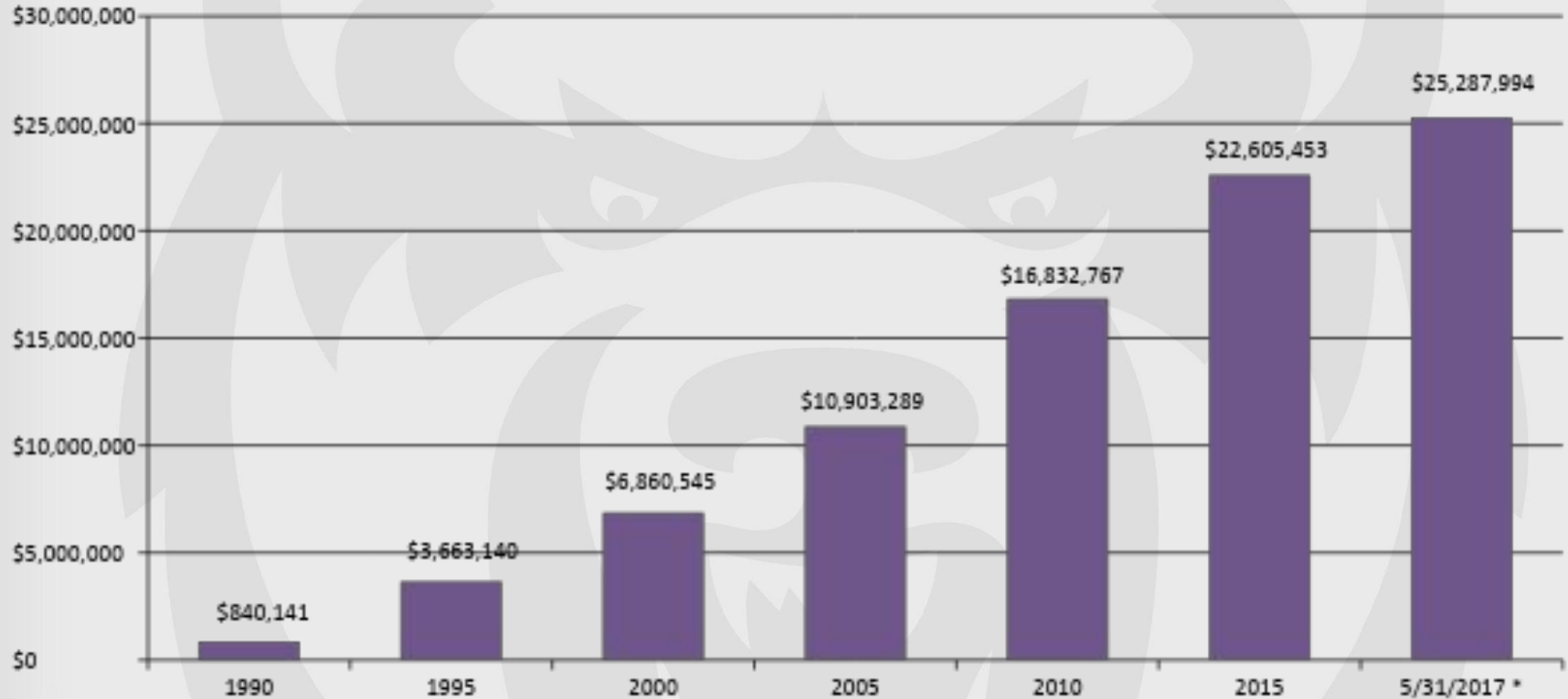
Goal 2: Letting external constituents know what is coming will take away the sticker shock. Asking for internships will give another way to support.

Campaign Planning Study



- 5 Month Process
- 50 Individual Interviews
 - List was developed based on LTG and Wealth Ratings
- 4 Focus Groups
 - Black Alumni, Physicians, Health Professionals, and Honors College
- Study focused on the endowment and capital priorities identified by the Board of Trustees
 - Growing Endowment – This has been the focal point of fundraising efforts. This focuses on faculty and student support, builds sustainability, and effects every person on campus.
 - Health Sciences Facility – Would allow UCA to expand its flagship programs
 - Fine and Performing Arts Facility – Would engage the community and consolidate

UCA Foundation, Inc. - Endowment



Findings – Objectives



ENDOWMENT: \$17M

- UCA now seeks to grow the endowment through philanthropy dollars to \$40 million. It will continue to be the focal point because it impacts every student and faculty member.
 - **Colleges:** Business, Education, Fine Arts & Communication, Health & Behavioral Sciences, Liberal Arts, Natural Sciences & Mathematics
 - **Other Departmental Priorities:** Schedler Honors College, Athletics, Student Services

CAPITAL PROJECTS NEED: \$98M

- Health Sciences Facility: **\$40M plus**
 - Opportunity to increase and expand our flagship programs
- Fine and Performing Arts Facility: **\$45M plus**
 - Opportunity to engage a transformational giver
- College of Education Facility: **\$12M - \$14M**
 - This is our genesis, and is in our DNA; there is a great amount of interest and potential in planned gifts because of our university's history

OTHER INITIATIVES:

- College of Business
 - Many people felt like the fastest growing college should be a priority in some capacity. It has stellar programs, is not named, and has potential
- Athletics
 - The majority of people commented the athletics is the most convenient connection to UCA, and winning makes it easy to stay connected

General Perceptions & Conclusions



- The majority of interviewees recalled positive experiences while at UCA and are extremely grateful for the foundation UCA provided.
- After years of leadership challenges, UCA has finally *“gotten it right.”*
 - President Courtway and President were perfect fits at their respective times.
 - The timing is now for UCA to promote EXCITEMENT! ***“If UCA is ever going to do this, they need to do it now.”***
- UCA has momentous strengths and opportunities supporting that now is the right time for a major philanthropic campaign.
- Significant energy and enthusiasm is present among capable prospects, who want to make a meaningful difference with their donations to UCA.
- At the same time, most feel the bold and compelling vision that will motivate major prospects to make extraordinary gifts to UCA has not been widely articulated yet – more than just bricks and mortar.

The Bottom Line



- A campaign to raise **up to \$100 million** is a realistic and achievable goal, provided UCA addresses key factors and commits to dedicating the financial resources and time to make a campaign of this magnitude successful.
- UCA should expect the campaign timeframe to be **five to 8 years** and should be a **comprehensive campaign**.
 - Start date should be July 2016 and include all gifts to date which total \$13.7 million
 - Current totals: \$14,957,441 – 21.37% to goal through 21.18% of time

Recommendations



- Anticipate spending at least 12 months sustaining and growing the Advancement program while launching smaller fundraising efforts around greatest need opportunities.
- Immediate actions include:
 1. Confirming priority projects.
 2. Strategizing pacesetter/lead gift opportunities.
 3. Adding Advancement staff.
 4. Engaging the Deans, Board of Trustees and Foundation Board in early campaign-related activities to leverage their relationships.
 5. Identifying and expanding the prospect pool.
 6. Identifying planned gift donors and confirming larger planned giving strategy.

Recommended Case for Support



- Develop an overall case for support, informed by the UCA strategic plan, to clearly articulate the University vision and highlight how the campus master plan projects will enhance the student experience and their success.
- The case should include the following:
 - UCA's uniqueness
 - Faculty, alumni and student success stories
 - University investment and total philanthropic need
 - Outcomes from new facilities not just the bricks and mortar