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February 11, 2020

TO: Rick Caulfield, Chancellor, UAS
Cathy Sandeen, Chancellor, UAA
Dan White, Chancellor, UAF
Susan Foley, President, UA Foundation and Chief
Development Officer
Michelle Rizk, Vice President of University Relations and
Chief Strategy, Planning, and Budget Officer

FROM: Jim Johnsen, UA President 

SUBJECT: Development Positions and Expectations

Following up on my verbal communication to you, this memo documents my final decisions regarding Development staffing and my expectations for our development team across the UA system moving forward.

Background

At its May 2019 meeting, the UA Foundation Board requested by unanimous vote that a committee be appointed to examine the development structure within the UA System. That committee recommended a move to a semi-autonomous development structure. This recommendation was made with input and background work by our AGB Consultant Len Raley.

Upon approval of the committee's recommendation by the Foundation Board at its August 2019 meeting, I asked Susan Foley to compile and submit a plan for implementation.

All of this took place after the Governor's budget veto in late June and before the signing of the Compact Agreement.

In light of our much improved circumstances resulting from the Compact Agreement signed on August 13 and with input from you, Susan suggested that full adoption of the plan should be reconsidered. I agreed. At the time of our joint meeting in late October 2019, Susan recommended, in agreement with university feedback, that management of major gifts development work will continue at the respective universities at this time. She also recommended

that development coordinator and annual giving positions be managed by the Foundation to support the universities in implementing the Appreciative Philanthropy model. This would add functions to support major gift work and optimize the limited funding that we have available.

Since that meeting in October, Development staffing has reduced further through attrition and both Susan and I are concerned that decreases in staffing will impact fundraising.

The Staffing Plan

I have decided, with Susan's approval and encouragement, that the Annual Giving and Development Coordinator positions will not be moved to the Foundation. They will be maintained at the universities with the intention that these positions will support the Major Gift Officers. This should lead to more direct, one-to-one contact between the Major Gift Officers and the donors who are in their portfolios. Those positions that are not currently filled should be recruited and filled as soon as possible.

Funding for the Annual Giving Officers and Development Coordinators has been provided by Statewide and the Foundation. FY20 is the second year of the three-year term funding for the Development Coordinators. Each chancellor should be prepared to continue funding these positions after FY21, as was envisioned when the positions were created. The Annual Giving Officers have been funded with base funding since FY17.

At no time in our history has it been more important to continue our investment in fundraising efforts, so please do not cut any development staff positions for the rest of FY20 and FY21. Any positions that become vacant should be filled expeditiously. Beginning in FY22, Foundation and Statewide support for the Development Coordinator positions will end, so I recommend you work now to formulate a plan to continue funding them, which was the expectation of the Regents and Foundation Directors in approving the campaign plan in 2018.

The Foundation will continue to guide the campaign. They will provide regular reporting on staff performance including contact reports, proposals and resulting contributions attributable to each development officer. This information is also available in real-time to all staff and leads through the Tableau software platform. Monthly reports of fundraising progress will also be provided by the Foundation. All Foundation reports are to be compiled according to CASE and other industry standards, as has always been the Foundation's practice.

Further Expectations

You have expressed a desire to manage your own development efforts. I encourage you to do so, provided that we all follow the plan adopted by the Foundation, cooperate and support one another as we work together on the systemwide comprehensive fundraising campaign. Our donors expect this of us, and it is vital that we meet their expectations.

Key to our success is dedicated and consistent use of the Prospect Management and Tracking System (PMATS), developed and maintained by the Foundation, and referenced in University Regulation R05.14.030. PMATS is a donor coordination and documentation system rooted in donor-centric best practices. The purpose of PMATS is to assure that donors are treated in a coordinated, respectful and clear manner. Guiding principles include:

- UA's donors have diverse philanthropic interests, so we promote donor-centric practices.
- UA's goal is to build lasting relationships with donors.
- Donor interest areas may span multiple departments and change over time.
- Internal and donor communication is fundamental.
- All relevant information is recorded in Raiser's Edge (RE).
- Collaboration, transparency, and trust are essential.

PMATS has been in place for over a decade and the Foundation's Prospect Management and Research team is now in the process of a "refresh" to reflect evolving donor best practices and the structure of our system team. The Foundation shares information about PMATS with new development officers as part of the onboarding process and maintains a page on the staff intranet with detailed information. A portion of our agenda for the all-day meeting scheduled for February 24 has been set aside so that Susan and her team can share more about PMATS and the framework of the Principal Gifts program with you.

Investment in philanthropy is to be maintained and increased when possible. With your leadership, development officers should focus the majority of their time on major gift work. Our development officers are being compensated at market rates for major gift officers and that focus will yield the greatest return on investment to your universities. Over the next month, we will work together to set fundraising goals.

At your request, the Foundation can provide information about industry standards for expectations regarding the number and nature of contact reports, proposals, and funds raised by major gift officers.

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As stated previously, our donors expect us to cooperate, collaborate, and present them with opportunities to invest in UA that match their passions and reflect our highest-level priorities and goals. Every communication with a donor or potential donor reflects on the University of Alaska system as a whole. In order to be most successful in attracting philanthropic investment we must make it our practice to cooperate, respect the vital roles both the development teams and the Foundation play in this work, and make it a habit to lift each other up as we communicate with donors.

Thank you. I look forward to working with you to make our campaign a success.