

# **UAF Development & Alumni – Program Review**

Submitted By: Emily Drygas, Director

Date: April 9, 2014

## **Who We Are - Development & Alumni Relations:**

**Description of Unit (Development)** – UAF's central Development office represents 12 positions (11 full-time employees and one .75% position). One position, a brand new Major Gift Officer position, is vacant (recruitment underway). The college and school fundraisers report directly to their Dean or director, and have a dotted-line report to UAF Development Director Emily Drygas. Those positions are funded 100% by the deans/directors. Central Development's mission is to build positive internal/external relationships and to solicit private funds from corporations, alumni and friends. In June of 2013, our central Development office went through a considerable audit of our organization. As a result, three primary divisions were developed: Major Gift Division, Annual Giving Division, and a Donor Relations Division. This revised approach has positioned our team more strategically and provides a more efficient and focused organization. Collectively, UAF's Development team is responsible for raising \$6-8M in philanthropic dollars annually. The primary service that the central Development office provides is raising private funds for scholarship, programs, equipment, capital and unrestricted needs. The secondary service we provide is a resource to UAF leadership and colleagues on strategies to raise private funds. This service is increasingly important as budgets decrease and more emphasis is placed on revenue sources such as private support. We also message the impact that philanthropy has on UAF's mission and showcase the impact that our donors have on UAF's mission. As of April 2014, we've surpassed our \$8M goal and have raised \$10.1M in private funds, which represents more than 4,000 donors year-to-date.

**Description of Unit (Alumni)** – Effective January 2014, the Alumni Office merged with UAF Development. Previously, the Executive Director reported directly to Vice Chancellor of University & Student Advancement, Mike Sfraga. The primary goal of this unit and the Alumni Association is to serve and support UAF graduates and to provide opportunities for Alumni to maintain lifelong and meaningful involvement with the University. A secondary role is to make connections with current students (prior to graduation) to build relationships and awareness. With an integrated Alumni Relations program, we are moving from an Association model that operated independent of the University and are moving in a direction to build a fully integrated organization that focuses on alumni relations and increased alignment with the Association and the University.

The Alumni office has two full-time employees (executive director and coordinator), as well as a student employee. Note that the Executive Director position is currently vacant and Emily Drygas is serving as the interim director. The Alumni Association supports 20% of the Alumni budget, with UAF supporting the remaining needs.

Attached is a current organizational chart that represents employees of the office of Development and Alumni Relations, with the exception of the 8 student callers who are employed for 14 weeks per year (see attachment 1 – Org Chart).

**History of Central Development & Alumni** - Our central Development staffing has changed significantly in the past year. Traditionally, we have been a 6-person department. With UAF's 100 year celebration approaching, UAF has an opportunity to create more awareness of our mission, engage our 30,000 alumni and increase philanthropic support. In recognition of this opportunity, last year Chancellor Rogers allocated new funding to the central Development office. As a result, we have strategically aligned our resources with our needs and have used this opportunity prepare for relationship-building opportunities linked to our centennial celebration.

With the exception of the recent integration of Alumni Relations with Development, the Alumni staffing/organizational structure has been in place for the past 10 years. Strategic planning is underway to integrate Alumni Relations with existing Development strategies. The goal is to build a 21<sup>st</sup> century Alumni Relations model that focuses on engagement opportunities for our 30,000 alumni, rather than limiting our focus to those alumni who are current dues' paying members (approximately 1,400).

### **How We Do It:**

Our **strategies and goals** are developed on the basis of UAF's mission and core values. On an annual basis, UAF Development Director works closely with Chancellor Rogers and Vice Chancellor Sfraga on the approval of a strategic plan that outlines the funding priorities for UAF as a whole, and outlines the strategic ways in which funds will be raised (see attachment 2 – FY14 Strategic Development Plan). The funding priorities reflect overarching needs for UAF, as well as donor-centric funding opportunities as determined by Deans, directors and key units. All priorities are focused on UAF's mission and core values. With the recent integration of Alumni Relations with central Development, Alumni Relations will be a key division within the office of Development & Alumni Relations. FY14 represents the first year that UAF Development has outlined a strategic plan that spans over 5 years (FY14 – FY18). Previously, an annual fundraising plan was developed; however, given the 100 year celebration, a long-range plan was necessary.

In addition to UAF's Development plan, Development Director Emily Drygas and Vice Chancellor Sfraga work closely with colleagues at the UA Foundation and other University colleagues to develop a system-wide plan that outlines overarching goals and metrics for the University's collective team. The FY15 plan is nearly finished and will be distributed on July 1, 2014. UAF's plan outlines specific strategies focused on multi-year funding priorities/initiatives and programs; however, key metrics are cross-referenced in both plans.

Our services (Development and Alumni) support the following core themes:

- **To Educate** – We regularly engage with our donors and summarize the impact their contribution has on our mission – and, we encourage them to consider ways to enhance

their support by inviting them to contribute to additional areas of interest. We educate our Alumni about the progress we are making as an institution and we encourage them to engage via Alumni receptions, Baseball gatherings, Reunion weekend, etc.

- **Discover** – We discover funding needs from our colleagues and we then discover donor interests so we can ultimately match donor interests with funding needs (donor-centric opportunities). This form of discovery is done through face-to-face meetings, proposals, and email/phone communication.
- **Connect/Engage** – Development has annual benchmarks for those employees who proactively invite donors to contribute to UAF (e.g., Major Gift Officers, Annual Giving employees) and we measure their activity to ensure that they are continuously working to connect, engage and interface with donors. Benchmarks are designed to ensure that our fundraisers are proactively engaging with donors to thank them for their support, discover new partnership opportunities, and to solicit support. Our fundraisers need to capture the donor's imagination and this is done when the funding need is clearly articulated and when the donors feel connected to the University. Alumni play a powerful role in the success of our Development goals. If our alumni feel engaged and connected with our mission (regardless of how many years it has been since their graduation date), the fundraisers will naturally move into a conversation that advances that relationship since the alumni feel valued, appreciated and engaged.

Team members of the office of Development and Alumni Relations are committed to a **high-quality service**. We have a set of core values (see page 2 of the FY14 Development Plan) that we abide by and we also have a set of expectations that we follow as representatives of the University (see attachment 3 – Office Expectations).

### **Ongoing Improvements:**

**Process Improvements** – The most significant process improvement this year was the audit of central development's organizational chart and the integration of Alumni Relations.

In addition, our team is continuously making process improvements to ensure that we are operating efficiently and that we have processes in place that allow for streamlined work. One example is the addition of a scholarship database (**Academic Works**). The software will be purchased before the end of this fiscal year, thanks to a grant received from the UA Foundation. Construction and testing will be conducted between July and November 2014 and the implementation will be in December of 2014. The end result will be a database that showcases UAF's privately funded scholarships, tells the story of the individual the scholarship honors, provides an opportunity for additional gifts to be made on the site, and manages scholarship application process. This will be an incredible management tool for our donors, financial aid colleagues, students, and development team members and is designed to be unveiled prior to 2015 celebrations. In summary, this new software will allow multiple users to access information in an integrated program that serves varying needs, while improving our level of service and outreach to donors and students.

This fiscal year, the major gift team at the central office has overhauled its donor portfolios so that there is portfolio alignment with the Chancellor's fund-raising initiatives and so that we are

in compliance with the UA Foundation's prospect management system. Additionally, customized donor portfolios are in place for UAF leadership, to include Chancellor Rogers, VC Sfraga, Sherry Modrow and Development Director Emily Drygas. This thorough review has established standard criteria for portfolios and will ensure that our fund-raising team has the framework needed (a targeted portfolio) to be successful.

**Rules, Regulation, Compliance** - The Development office complies with the rules and regulations of the UA Board of Trustees and UA Board of Regents. Development Director Emily Drygas meets with the Executive Development Council and attends the UA Board of Trustee meetings on a regular basis to learn new updates that will impact our fundraising team and donors. As a result, appropriate communication is prepared for these audiences depending on the situation and/or potential impact. Additionally, as a member of the Association of Fundraising Professionals (AFP), UAF Development also follows the guidelines outlined in the donor bill of rights, which acknowledges the rights of donors and reflects the responsibilities development professionals have when working with donors.

The Alumni Association has a board of directors and association-related activities are overseen by the board of directors. Alumni Relations' activities are in the process of being integrated with Development strategies in the near future.

**Addressing Risk** - Our Development office has addressed risk by purchasing a security lock and audio system that allows our front-line staff members to provide access to our office areas. This was implemented as a result of unwanted walk-ins by individuals passing by who were often intoxicated and who had inappropriate behavior. The result is a safe and secure working environment for our employees. Secondly, we developed a departmental emergency plan for our Development office and all managers and employees have a copy of this document. With the recent merge of Alumni with Development, subsequent plans need to be developed. Lastly, we comply with UA Foundation guidelines to ensure that all contributions (checks and cash) are stored in a secure safe at our central office and that they are promptly deposited as intended by donor(s).

**Self-Evaluation of Organization** - Development's largest customer group is our donors (4,000+). These "customers" represent corporations, foundations and alumni. Additionally, for both Development and Alumni, our alumni base is another large customer group (30,000). Students and faculty/colleagues would be an additional customer group that is critical to our fundraising and relationship-building success. My perceived customer service experience (re: donors) is "Very Acceptable." For Alumni, I expect it to be "moderately acceptable" given that we have been supporting an independent alumni association rather than seeking broad alumni engagement through a comprehensive alumni relations program.

We do not have a recent customer service survey on hand for Alumni or Development— but, will review this concept and consider implementing one. The feedback would be helpful as we move forward with centennial discussions and increased fund-raising goals. Feedback from Marketing's recent survey, in the interim, will be insightful.

**Ongoing Communication & Outreach** - For Development, we are continually making adjustments to improve our method of communication. For example, we regularly have in-depth conversations with our Foundation colleagues on Foundation fund reports that outline balances and giving summaries. Our role is to ensure that the needs of the donors are met and that we accurately share this information about their balances, contribution, etc. In addition, we inform colleagues that UAF follows national standards for fundraising (e.g., Council for Advancement and Support of Education) and that these standards are maintained to ensure there is consistency and transparency. We also prepare the Chancellor's Report on Philanthropy (3 issues per year) to celebrate the impact that philanthropy has on our mission.

For Alumni, positive change is underway as we build an integrated Alumni Relations model into our organizational chart and strategic efforts. The end-goal is to build a new Development/Alumni organization that is both strategic and operational – and, one that communicates our newly defined mission to internal and external audiences. Communication outreach (social media, newsletter, web site, etc.) needs to be audited and reviewed to better understand its distribution, outreach and impact.

## Metrics:

Below is a summary of UAF metrics and giving projections (FY14 – FY18). The summary outlines our annual fund-raising goals and the benchmarks we have for targeted areas. These metrics are consistent with industry-wide standards of measurement that ensure that proactive efforts are made by fundraising employees. (Please also reference page 13 of the FY14 plan.)

	FY14 Goal	4 year projections					
		annual % projected increase for					
	FY14 Goal	FY15-FY18	FY15	FY16	FY17	FY18	TOTAL
**Fundraising Goal - TOTAL	\$8,000,000	9-11%	\$9,000,000	\$10,000,000	\$11,000,000	\$12,000,000	\$50,000,000
Initiative	2,700,000		\$3,575,000	\$3,575,000	\$3,575,000	\$3,575,000	\$17,000,000
Annual	5,300,000		\$5,425,000	\$6,425,000	\$7,425,000	\$8,425,000	\$33,000,000
**Individual giving: % of total \$ raised	26%	2%	28%	30%	32%	34%	
Number of Donors	4,600	8%	4,968	5,365	5,795	6,258	
**Alumni Participation - % increase	4.6%	0.50%	5.10%	5.60%	6.10%	6.60%	
**Annual Giving	\$375,000	10-13%	\$425,000	\$475,000	\$550,000	\$600,000	
**Donor Retention	40%	5%	45%	50%	55%	60%	
Number of Faculty/Staff Donors	610	5%	641	673	706	742	
**Proposals	102	3-5%	106	110	113	118	
**Individual	31	5%	33	34	36	38	
**Corporate and Foundation	71	3%	73	75	78	80	
Contact Reports	747	3%	769	792	816	841	
New Donors	1,247	8%	1,347	1,455	1,571	1,697	
Upgraded Donors	2,103	5%	2,208	2,319	2,435	2,556	
**New Legacy Society Members	5	30%	7	8	11	14	
**Gifts over \$25K	80	3-5%	83	86	88	91	
**Individual (% increase)	16	5%	17	18	19	19	
**Corporation and Foundation (% increase)	64	3%	66	68	70	72	

Projected monetary goals for FY15-18 are projected based on staff growth model and centennial celebration opportunities.  
 Proposal and Contact Report goals based on HSGO expectations and Prospect Management and Tracking System guidelines.  
 Other metrics based on historical giving data (annual averages) from FY08 - FY13.  
 \*\* Indicates UAF Foundation Coordinated Metrics.

	UAF Development Metrics (FY08 - FY13)					
	FY08	FY09	FY10	FY11	FY12	FY13
Dollars Raised (All)	\$7,397,865	\$6,427,903	\$7,021,441	\$21,602,935	\$19,241,933	\$10,190,631
Dollars Raised (philanthropic)	\$7,397,865	\$6,427,903	\$7,021,441	\$4,788,779	\$13,289,740	\$5,700,468
Number of Donors	3,203	3,225	3,428	3,645	3,835	4,392
Number of Faculty/Staff Donors	407	502	589	563	576	581
Proposals	37	44	44	49	60	67
Contact Reports	140	255	182	185	269	581
New Donors	857	796	956	952	900	1,188
Upgraded Donors	1429	1420	1,481	1,721	1,796	2,003
New Legacy Society Members	10	11	8	12	5	4
Gifts over \$25K (philanthropic)	45	32	30	40	62	50

\*Effective FY11, private grants are included

## Our Peers:

A comprehensive summary of peer organizations in similar size or scope is referenced below. This represents full time employees for Development and Alumni Relations. Some notable observations include the following:

- UAF is clearly understaffed in the area of major gift officers.
- Further research is needed with each University represented; however, at a glance, the reporting line structure for the majority of Universities represented appear to have a reporting line to central (regardless of the college/school they represent) which provides for more accountability and management.
- There's recognition that some organizations have a centralized fund-raising operation at either the University or Foundation level.
- UAF is also understaffed in the area of Alumni Relations' staff. UMT Foundation has a separate reporting line for Alumni. All others represented had an integrated model with Alumni residing in the same department as Development.

### Peer Institution Comparison

	UAF	UAA	UAS	UA Foundation	Univ of Idaho	UMT Foundation	MSU Foundation
FY13 Contributions	\$5,704,733	\$10,572,469	\$626,532	\$793,345	\$27,626,903	\$17,480,000	\$10,805,904
FY14 YTD Contributions (as of 4/7/14)	\$10,188,883	\$5,027,812	\$294,254	\$1,470,835			

#### Central Development Staff/Functions

Director of Development/Chief Dev Officer	1	1	0.5	1	1	1	1
Donor Relations Director	1	1	0	0	1	0	0
Central Major Gift Officers	3	7	0	0	17	14	18
Annual Giving	2	3	0.5	0	4	2	0
Donor Relations Officer	1	1	0	1	1	0	0
Stewardship Specialist	0.75	0	0	0	1	0	0
Event Specialist	1	1	0	0	1	0	0
Gift Planning	0	0	0	1.5	4	1	1
Support Staff (Asst. to Dir. & Fiscal Prof)	2	2	2	0	0	0	0
<b>Subtotal</b>	<b>11.75</b>	<b>16</b>	<b>3</b>	<b>3.5</b>	<b>30</b>	<b>18</b>	<b>20</b>

#### Foundation/Admin Functions

President/Exec. Director	0	0	0	1	1	1	1
Advancement Services (Data, fund, gift)	0	0	0	10	6	14	12
Prospect Research and Mgmt.	0	0	0	3	4	3	2
Advancement Services (Data, fund, gift)	0	0	0	0	8	0	0
Accounting	0	0	0	7	2	5	3
Event Specialist	0	0	0	0	0	0	4
<b>Subtotal</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>21</b>	<b>21</b>	<b>23</b>	<b>22</b>

#### DO's at College & Schools

College/School Dev Officers*	3	0	0	0	0	0	0
<b>Subtotal</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

<b>Total Development Staff</b>	<b>14.75</b>	<b>16</b>	<b>3</b>	<b>24.5</b>	<b>51</b>	<b>41</b>	<b>42</b>
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\*UAF Development Officer Numbers reflect total Development related FTE hours. There are 7 positions total, with various percentages of time dedicated to fundraising activities. NOTE: UAA and University of Idaho Advancement units also include staff dedicated to Marketing and Communication. These positions are not reflected in the totals above.

	UAF	UAA	UAS	UA Foundation	Univ of Idaho	UMT Foundation	MSU Foundation
<b>Alumni Staff</b>							
Exec Director	1	1	0.5		1	1	1
Assoc Director	0	0	0		2	1	0
Asst Director	0	1	0.5		0	0	0
Data	0	0	0		0	2	0
Events Coordinator	0	1	0		2	2	0
Web/Media/Communications	0	1	0		1	2	0
Membership	1	0	0		0	1	1
Alumni Relations Officer	0	0	0		0	0	2
Work Study Program	0	0	0			2	0
Support Staff	0	0	0		2	1	0
<b>TOTAL</b>	<b>2</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>8</b>	<b>12</b>	<b>4</b>

Peer institutions have been selected based on previous institutional comparisons. They have been pulled from the Standard Academic Peers listed on the UAF Peer Institutions document referenced at the July 24, 2012 Chancellor's Executive Leadership Workshop (Attached).

## **Efficiencies:**

Regarding shared services, the office of Development and Alumni Relations is at capacity and would not be in a position to take on additional responsibilities. Our recent organizational audit (June 2013) provided a comprehensive review of each position, titles in the context of the increased fund-raising expectations ahead with our centennial celebration. The additional feedback provided by external consultant Kristin Prieur and Mary Gresch (June 2013) recommended Alumni Relations be integrated with Development. This integrated approach is designed to develop the alumni association to a level where it can engage a broad base of alumni, build loyalty, support the vision of the Chancellor and the University leadership and provide leadership for the centennial celebrations ahead. The end result will be an efficient and functional team that is strategically moving forward with a shared vision. As we move forward with expanded fundraising goals, additional funds will be necessary to accommodate for face-to-face visit with donors, centennial events/celebrations, and marketing materials that will be necessary to create awareness of our centennial initiatives and funding priorities.

## **Budget Realities:**

The following scenarios represent potential (and approximate) cost-saving measures at incremental budget reductions (3-12%). Since the office of Development and Alumni Relations is a revenue-generating department, the proposed cut-backs would significantly impact revenue-generating programs and ultimately set UAF back for many years given the negative impact that these reductions will have on donor and alumni relations.

### **3% Reduction: Development (\$32,319); Alumni (\$4,929)**

- **Development** – Reduce professional development/trainings; Events; Major Gift Travel
- **Alumni** – Down-size Rendezvous Alumni Banquet to an alumni reception

### **6% Reduction Development: (\$64,638); Alumni (\$9,858)**

- **Development** – Eliminate the revenue-generating phone program within the Annual Giving program; Reduce professional development/trainings; Eliminate 2 core events – Donor Thank You & Scholarship Breakfast; Reduce Major Gift Travel.
- **Alumni** – Eliminate the student employee position.

### **9% Reduction: Development (\$96,957); Alumni (\$14,787)**

- **Development** – Eliminate the annual giving coordinator position, a revenue-generating position that raises unrestricted support for UAF.
- **Alumni** – Eliminate the student employee position and reduce the coordinator position to .75 FTE.



**12% Reduction: Development (\$129,276); Alumni (\$19,716)**

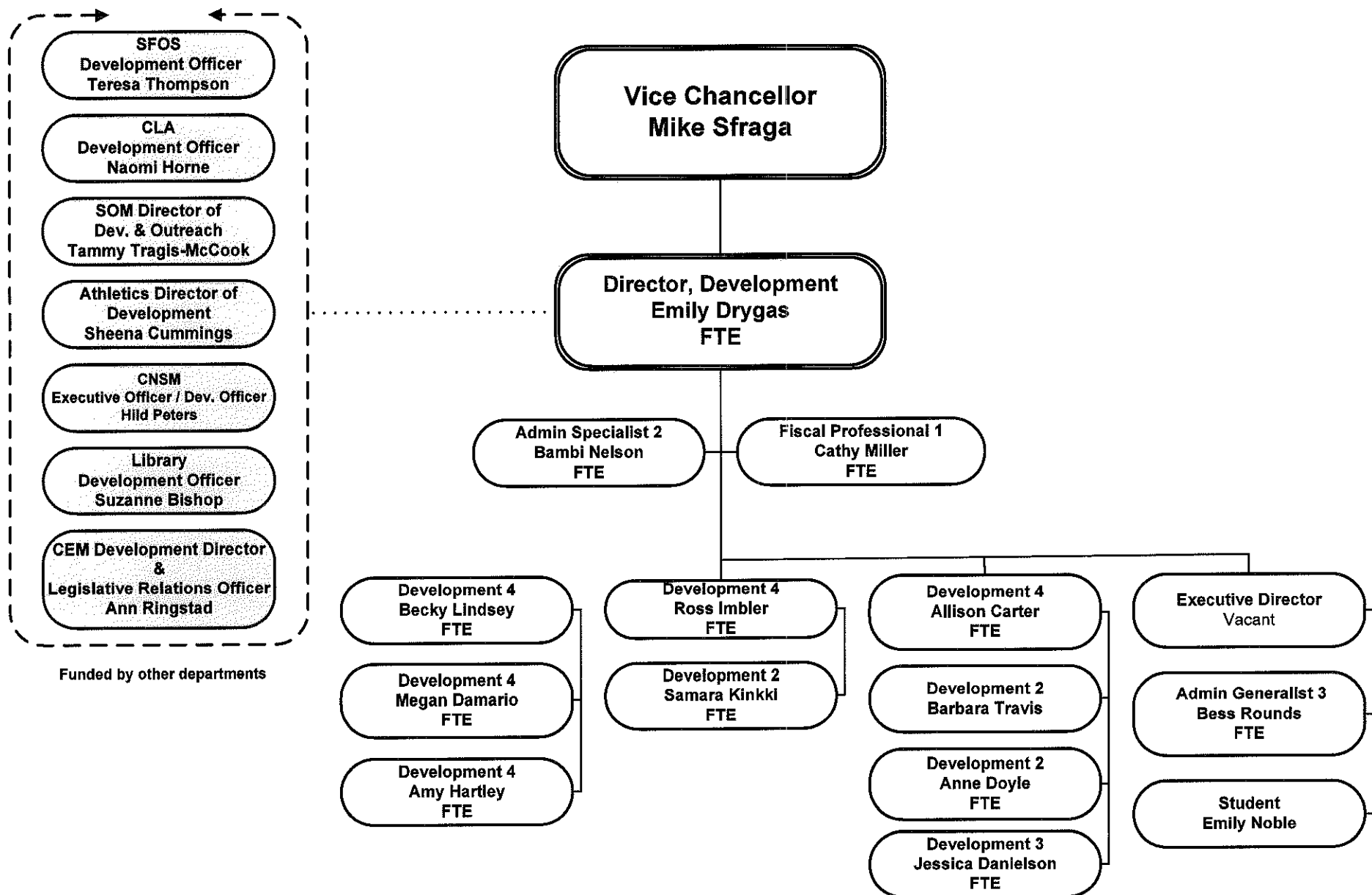
- **Development** – Eliminate the annual giving coordinator position (a revenue-generating position that raises unrestricted support for UAF) and the phone program. Reduce annual event expenditures.
- **Alumni** – Eliminate the student employee position and reduce coordinator position to .75 FTE and reduce the scale of the Rendezvous event.

**Engagement Opportunities – Centennial**

Alaska's flagship campus is approaching its centennial. After nearly 100 years, there is much to celebrate and reflect upon. Our academic programs range from the certificate level to PhDs. Undoubtedly, our mission of teaching, research and outreach is touching the lives of our students, our staff/faculty, Alaskans, and friends throughout the global community. The relationships we've built over the years have positively influenced and expanded our vision at UAF. As we look ahead to the next 100 years at UAF, it's time to reengage with old friends and alumni to update them on our progress and our vision ahead. Relationship building is a core principal to the work of our development and alumni team. Every day, our team is engaging, interacting and communicating the needs of our mission with our friends, alumni, corporations and foundations. The proactive outreach efforts of our development & alumni team are that much more successful thanks to the good works of our collective, staff and faculty. Ongoing review of our progress to date, coupled with increased metrics and outreach in the future, will ensure that we continue to increase philanthropic dollars raised for UAF.

# University of Alaska Fairbanks University and Student Advancement

## Development



FY14

# Strategic Development Plan

Confidential

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UAF is an AA/EO employer and educational institution.

# University of Alaska Fairbanks

## FY14 Strategic Development Plan

**CONFIDENTIAL**

**Prepared By:**

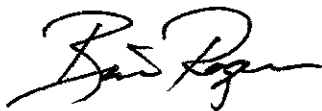
*Emily Drygas  
Director, UAF Development*

**Approved By:**

*Brian Rogers  
Chancellor, University of Alaska Fairbanks*

*Mike Sfraga  
Vice Chancellor, University and Student Advancement  
Date of approval: December 2013*

We have reviewed the following **FY14 Development Plan for UAF** and agree that the fundraising priorities set forth are consistent with campus priorities.



Brian Rogers, Chancellor



Mike Sfraga, Vice Chancellor

## Overview

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- A Donor Bill of Rights
- UAF Fundraising Coordination Policy
- Guide to Fundraising at UAF
- Facilities Naming Guidelines
- Naming Opportunities for Benefactors/Donors
- Memorial Giving at UAF
- In Kind Gifts of Equipment and Tangible Property Form
- UAF Development Stewardship Matrix

### IV. Chancellor's Report on Philanthropy

- 2012 Fall Edition
- 2013 Spring Edition
- 2013 Summer Edition

## Welcome from the Chancellor

September 2013

Dear Colleagues,

The University of Alaska Fairbanks, Alaska's flagship campus, is approaching its centennial. After nearly 100 years, there is much to celebrate and reflect upon. Our academic programs range from the certificate level to PhDs. Undoubtedly, our mission of teaching, research and outreach is touching the lives of our friends and fellow Alaskans, in addition to our students, staff and faculty throughout the global community.

The relationships we've built over the years and the communities we serve have positively influenced and expanded our vision at UAF. As we look ahead to the next 100 years at UAF, it's time to reengage with friends and update them on our progress and our vision ahead. Relationship building is a core principal to the work of our development team. Every day our development team is engaging, interacting and communicating the needs of our mission with our alumni, friends, corporations and foundations. The proactive outreach efforts of our development team are enhanced when they're able to collaborate and engage with fellow colleagues to better understand needs.

On average, UAF generally raises \$6M annually; the goal for fiscal year 2014 is an aggressive \$8M. Particular focus will be given to four funding priority areas: **Troth Yeddha' Park, Engineering/Energy, Ted Stevens' Project and R/V Sikuliaq**. We have great momentum as last year UAF welcomed a total of 4,392 donors (a 15% increase over the previous year).

Sherry and I are both committed to building donor relationships and inviting alumni and friends to consider giving back to Alaska's flagship campus. A strong passion for our mission and strategic preparation are the key tools needed to build these important relationships. As we look ahead, I challenge you to view yourself as a primary donor advocate who can inspire donors to come forward and make a difference at UAF. Contact the UAF Development office at 907-474-2619 if you have any questions or need guidance on ways you can engage with our alumni and friends.

Best wishes on a successful year of relationship building!

Sincerely,

A handwritten signature in black ink, appearing to read "Brian Rogers", with a stylized, flowing script.

Brian Rogers, Chancellor

## Vision for UAF Development

### Purpose

To build meaningful relationships that will advance our mission, raise awareness of funding priorities and secure philanthropic support for UAF.

### Vision

To be a highly productive department within the university, with the goal of proactively building new and existing relationships, securing additional private support and being efficient with funding resources.

To be authentic and transparent when building internal and external relationships, when mentoring team members and when working alongside colleagues.

To be aware of university funding priorities and to consistently work on building donor-centric opportunities that match the university's priorities with the interests of the donor.

### Core Values and Guiding Principles

- **Be dedicated to the meaningful work we do.** Recognize that raising philanthropic awareness/support is centered on building positive relationships both internally and externally.
- **Set high expectations.** Follow through on promises made and commit to listening to the needs of both our donors and our colleagues.
- **Prioritize our work.** Provide professional service and resources to donors and colleagues.
- **Be solution-oriented.** If there's not an answer at hand, discover one and present it as a possible next step.
- **Treat all equally,** despite their background, affiliation or title.
- **Be patient but persistent** when building relationships and inviting donors to contribute to our mission.
- **Be strategic** but remember to keep perspective and a sense of humor.
- **Be curious and passionate** about the work we do.
- **Set the bar high,** attract exciting people to our team, and make a difference at UAF.

## Who We Are

The central development office (see organizational chart on the following page) is undergoing reorganization to better position our team for the opportunities ahead. The end result will be a well-defined organization that is focused on the primary areas of strategic donor relations (prospect analysis, research, stewardship, etc.), annual giving and major giving. This 11-person team will work hand-in-hand with UAF's unit and college/school fundraisers as well as colleagues with our University of Alaska Foundation.

Above and beyond the philanthropic support raised in fiscal year 2013 (\$5.7M with an increase of 15% in donors), this past fiscal year has been a year of capacity building including the following areas of focus:

- **Expanding our staff and reorganizing** to better focus and position our department for success;
- **Partnering with consultant Kristin Prieur** to build momentum and focus as we approach centennial and beyond;
- **Revamping our web site** look and content to reflect the new branding and to provide resources more effectively;
- **Unveiling of a new interactive donor wall** that will be displayed at the Great Hall in time for our November 2013 Celebration of Giving thank-you reception.
- **Implementation of a new database** that will interface with Development and Financial Aid (a resource for both donors and students). Research has already begun on this project.
- Partnering with our UA Foundation colleagues on bringing fundraising experts from the **Institute of Charitable Giving** to campus for a complimentary training focused on major gifts.
- Continuing to **build a culture of philanthropy** to include a more robust employee giving program (coming soon), marketing of the Pick.Click.Give. program, etc.

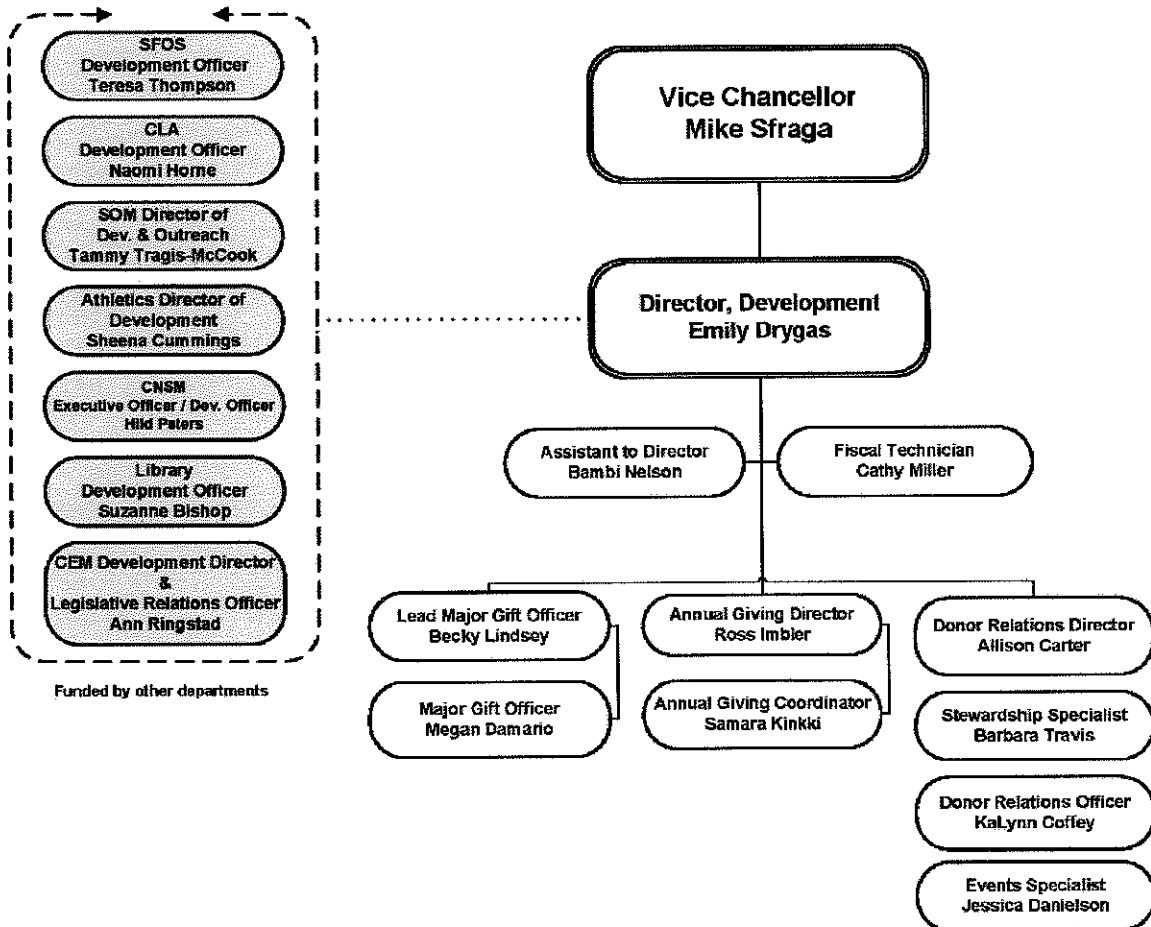
The UAF development office is committed to building relationships and inviting donors to make a difference. As we work to raise **our collective goal of \$8M for fiscal year 2014**, we continue to be inspired by the meaningful work we do and the opportunities ahead.



## Organizational Chart

### University of Alaska Fairbanks University and Student Advancement

### Development



## **Strategic Development Plan (July 1, 2013 - June 30, 2014)**

The following six goals outline strategic areas of focus for UAF's development office. These are broad and overarching areas of priority to guide the team this fiscal year and to set the foundation for future years. One-page summaries outlining the key strategies for each division (donor relations, major giving and annual giving) will immediately follow the goals listed below. Additionally, a historic look of FY08 - FY14 metrics and giving projections, UAF-wide funding priorities, as well as specific college/school/unit priorities, will follow.

**GOAL 1: Proactively work to raise \$8M (25% increase from last year) from corporations, foundations and individual donors and grow our donor base to 4,600 (5% increase from last year).**

### **Strategies:**

- Develop **four primary appeals** via the Annual Giving program, with select smaller and targeted appeals developed for priority areas of interest.
- Plan and conduct a **fall and spring phonathon program** (seven weeks each) via the Annual Giving program. (annual giving goal in FY14: \$375,000 from 1,040 donors).
- Work to **renew major gift commitments** that occur on an annual basis via face-to-face communication, proposal writing, etc. (66% of overall goal).
- Proactively work to **raise new major gifts** for UAF with an emphasis on the Chancellor's funding priority areas as well as a special emphasis on individual giving. (34% of overall goal).
- Proactively solicit and renew **scholarship support** (major gift level) to enhance both recruitment and retention opportunities for students.
- Focus on **planned giving donors** — stewarding them and building the number of donors who have included UAF in their wills. If one is a planned giving donor, but not a major gift donor, invite him or her to make a monetary gift (overall goal to raise the number of planned giving donors by 25%).
- Identify major gift donors for **targeted naming opportunities** and build gift range charts for each prominent infrastructure and facility project.
- Continue to **promote the importance of in-kind gifts** to colleagues/donors internally. Proactively work to **solicit in-kind gifts** and celebrate donor in-kind contributions.

**GOAL 2: Continue to implement key recommendations made by fundraising consultant (Kristin Prieur) with the goal of taking the Development office to the next level in an effort to meet the emerging funding needs of our mission.**

### **Strategies:**

- Continue to finalize central development's **reorganization**, including the revamping of each employee's position description, reporting lines and priority focus areas.

- **Build a cohesive team** focused on the (3) primary areas: Donor Relations, Major Giving and Annual Giving.
- **Mentor** new team members, **hire** an Events Specialist, and **provide vision** for the team.
- Work closely with Kristin Prieur on **creating viable fundraising strategies** for UAF's four funding priorities. Determine next steps, based on those results and build into fundraisers' strategies and focus areas.
- Work strategically with **UA Foundation colleagues, UAF University and Student Advancement colleagues, and other University colleagues** on building trust, communication and appreciation.

**GOAL 3:** Design and implement new procedures that will better support development operations.

**Strategies:**

- Via the Donor Relations' division, **develop tools** that will proactively manage and track major gift progress, annual scholarship support, pledge reminders and annual stewardship reports.
- Research and **implement a new database system** that will serve as a resource for the Development Office (donors) and Financial Aid (students). Unveil at the 2014 17th Annual Scholarship & Award Breakfast.
- Develop a more thorough and focused system to **proactively analyze** existing endowments and donors who support them for possible upgrade opportunities. Interface with the UA Foundation on wealth analysis resources available to prioritize donor prospects (new donors and existing).
- Regularly **interface** with the Prospect Research and Management Director at the University of Alaska Foundation on **portfolio maintenance and reporting** to continue to meet industry standards.
- Develop a **tracking system** to manage and carry-out contact report actions from leadership's development activities and ensure updates from these activities are provided to the fundraisers at the central development office on a regular basis.
- Organize a **tracking process for naming opportunity requests** from internal colleagues. Reference the naming guidelines document and the one-page sample drafted by the development office.
- Develop processes and resources for the newly defined **donor relations and major gift divisions to streamline workflow**.

**GOAL 4:** Further develop the Donor Relations division to serve both donors and the collective fundraising team.

**Strategies:**

- **Utilizing donor history and data**, provide concise and focused briefings that will be used strategically for donor visits.

- Conduct proactive **prospect analysis** to inform and influence targeted areas of focus for major gift strategies and for strategic receptions at the Chancellor's residence.
- **Conduct strategic event management** focused on UAF's primary fundraising events. Create strategic goals and vision for each event, along with a thorough debrief to ensure that insight is captured from donors and team members.
- Proactively generate a list of donors with **high capacity and affinity** to be highlighted for leadership and the fundraising team for key face-to-face opportunities.
- Analyze the **history of UAF's donor base** and make recommendations on new strategies and approaches that will position the team for success and growth as well as, influence long-range planning related to initiatives, campaigns and staff growth models.
- **Continue and analyze Meaningful stewardship** outreach (letters, postcard of impact, *Chancellor's Report on Philanthropy*, etc.) continued via the Stewardship Specialist. Emphasis on engaging first-time donors to UAF.

**GOAL 5:** Continue to focus on building internal relationships within the university to create awareness of philanthropy and the impact that it can have at UAF.

**Strategies:**

- Work to create a **culture of giving** at UAF, with a focus on sustainable, long-term relationships.
- Educate colleagues about the **impact that donors** have on our students, programs, etc.
- Meet with colleagues to **understand funding needs/constraints** and advise them on strategic fundraising approaches.
- Encourage the development team to be involved in UAF related activities and work to better understand our mission.
- Reinforce the **important role** that colleagues at all levels (staff, faculty, deans, leadership, etc.) have on influencing a donor when they speak from their experience, passion, etc.
- Inform colleagues that UAF follows **national standards** for fundraising (e.g., the Council for Advancement and Support of Education (CASE) and that these standards are maintained to ensure there is consistency and transparency.

**GOAL 6:** Encourage the development team to build community, statewide and national relationships to advance our knowledge base and to create awareness of our mission.

**Strategies:**

- Encourage staff involvement in **professional organizations** such as the Association of Fundraising Professionals (AFP), CASE (Council for Advancement and Support of Education), Rotary Club, Chamber of Commerce, ADRP (Association of Donor Relations Professionals) APPRA (Association of Professional Researchers for Advancement),

Inspire Leadership Academy, NCMPR (National Council for Marketing and Public Relations), IAAP (International Association of Administrative Professionals), etc.

- Encourage **professional development opportunities** such as attending conferences, participating in webinars/on-campus trainings and allowing time for review of fundraising literature.
- Increase **networking opportunities** for the development team to be inspired and expand their relationships.
- Encourage **community service**, with the goal of being engaged and giving back to our community (e.g., Heart Walk, Clean-Up Day, etc.).

## **Donor Relations Division**

The Donor Relations team identifies, researches and analyzes prospects for major gift cultivation and solicitation; serves as the primary contact for UAF scholarship management; provides Stewardship for all gifts received at UAF; and manages all fundraising focused events on campus. This strategic and creative team provides a foundation for proactive and reactive vision of the annual and major gift programs and collectively for the UAF development team.

### **Prospect Identification**

- Identify, research, and analyze prospects for major gift cultivation and solicitation. Proactively identify and qualify prospective individual, corporate and foundation donors consistent with the university's priorities.
- Compose giving and activity reports for university and development leadership.

### **Stewardship**

- Ensure donors are effectively stewarded in a timely manner.
- Oversee recognition events, assist with gift recognition press releases and make annual updates to the donor recognition wall.
- Design and distribute the Chancellor's Report on Philanthropy (three times per year).
- Coordinate an invite for donors to make contributions using their Alaska Permanent Fund dividend through the Pick.Click.Give. program.

### **Events**

- Provide support and guidance for event management of annual and high-profile development events along with monthly receptions in the Chancellor's home. Annual events include the Celebration of Giving event, Chancellor's Gala, Annual Scholarship & Award Breakfast, Emil Usibelli Awards for Distinguished Teaching, Research, and Service and host one to two small receptions each month in the Chancellor's home.

### **Scholarship/Fund Management**

- Provide management, leadership and oversight of UAF's privately funded scholarship program.
- Create partnerships with the UA Foundation, UAF Financial Aid, college and school scholarship contacts and UAF student services to implement checks and balances to the overall process with the goal of increasing credibility and accountability to donors and students.
- Coordinate with Financial Aid and the Scholarship Coordinator to develop and launch a new scholarship website at UAF that will steward donors and prospects, and provide scholarship marketing to students.

The Donor Relations division provides vital data and information that influences decisions made by leadership regarding donor strategies. Effective stewardship is critical to maintaining strong relationships with UAF's constituents and plays an active role in retaining future support for funds and scholarships that aid students. Events help to steward and cultivate these relationships and are vital to a successful fundraising program and the continued future support of the University of Alaska Fairbanks.

## Major Giving Program

The UAF major gift program builds meaningful relationships with individuals, corporations and foundations with the goal of raising philanthropic gifts of \$25,000 and above in support of students and programs at the University of Alaska Fairbanks. The major gift team works to discover, develop and maintain donor relationships that will support short and long-term fundraising strategies, focused on UAF's four fundraising priorities and donor centric opportunities. Throughout FY14, the major gift program will implement the following strategies:

### Portfolio Development

- Build major gift prospect portfolios within the PMAT (Prospect Management and Tracking) system to accomplish UAF's \$8M fundraising goal.
- Portfolios will include prospects who can support growth in the following areas: Chancellor's fundraising priorities, Scholarship/fellowship, Discovery of new individual/alumni donors – qualification of new prospects with high capacity and Planned gift prospects

### Benchmarks and Metrics

- Develop metrics and track central major gift team progress toward goals.
- Follow PMAT system standards to reach goals:
  - Portfolio size: approximately 100 total for a fulltime major gift officer to include 40 - 60 qualified prospects/donors and 30 discovery prospects ("disco" pool).
  - Contact reports: 96 - 144 per year (8 - 12 per month).
  - Solicitations: 13 - 20 per year (primarily focused on top-20 prospects). Solicitations will include annual major gift renewals as well as new major gifts in support of the Chancellor's fundraising priorities.
  - Discovery: Meet with and qualify at least half of the discovery prospect pool within the fiscal year.

### Strategy/Resource Development

- Conduct regular central major gift team meetings and collaborate with UAF college and school development officers to discuss prospect management and strategy.
- Build well-defined and specific strategies for each top-20 prospect, tied to fundraising plans for UAF's four fundraising priorities.
  - Strategies will be one page in length and detail year-long communication/contacts that will result in a major gift solicitation in FY14 (*strategy document available upon request*).
- Build an annual travel plan for the major gift team with the goal of cultivating major gift prospects and discovering new donors across Alaska and the U.S.
- Provide fundraising strategies, resources and leadership for UAF fundraising events such as the Chancellor's Gala, Rotary events, etc.
- Compile UA Foundation and UAF resources on major gift processes and guidelines for central the major gift team and campus development officers.

The UAF major gift team works in collaboration with UAF leadership, faculty and staff to connect prospects with UAF and guide donors through the giving process. On an annual basis, a full-time major gift officer will manage a portfolio of approximately 100 prospects; solicit gifts of \$25,000+ with a goal of raising at least \$1M toward UAF's \$8M fundraising goal.

**\*On the following page please see the major gift program meeting structure/approach.**

## Major Giving Program Meeting Structure

### Participants

#### **Central Team Major Gift Officers (% Time Dedicated to Major Gift Activates):**

Emily Drygas (25%)  
Becky Lindsey (75%)  
Megan Damario (100%)

#### **Central Team Representatives:**

Allison Carter, Bambi Nelson

#### **College/School Development Team Members (% Time Dedicated to Major Gift Activates):**

Teresa Thompson (50%)	Hild Peters (20%)
Naomi Horne (60%)	Suzanne Bishop (75%)
Tammy Tragis-McCook (60%)	Ann Ringstad (50%)
Sheena Cummings (90%)	Drena McIntyre (N/A)

#### **UA Foundation Representatives:**

Megan Riebe, Candice Krupa

*\*\*Note, if UAF participants are unable to attend in person, please send an alternate in your place or connect with a colleague afterwards to get updated on discussion, progress, etc. Audio will be offered to Foundation colleagues in Anchorage; however, for on-campus representatives, the goal is to have face-to-face meetings. Meeting notes will also be shared (post meeting) in the future.*

*\*Distribution lists to be updated and refreshed.*

### Meeting Frequency

- Proposing face-to-face meetings every other month, 2-hour discussion. We can send a Doodle Poll to find the ideal time for our regular meetings.
- One-on-one meeting opportunities (on alternate months) for fundraiser and Development Director. Priority given to initiative priorities and/or time-sensitive funding priorities.
- Central will calendar/propose after the August meeting.

### Meeting Focus (Effective October 2013)

*\*\*Agendas to be submitted in advance.*

- Shifting discussion and participants to focus on building a cohesive major gift team.
- The goal is to learn (and mentor), improve communication/understanding, become a cohesive team, build strategic opportunities/synergy.

### Key discussion points

- Updates & Progress (Central)
- Major Gift Officer (MGO) Reports:
  - Summary of your 16-18 months strategy for your top donors (*each fundraiser to focus on 3 each meeting*)
  - Review of Top 20 progress
  - Report on Disco Calls
  - Updates on contact reports/recent activity
  - Summary of progress to date for each donor
- Research, Wealth Analysis, Metrics, Accountability (Foundation)
- What's working/What's Not (Personal experience, conference feedback, etc.) - ALL
- Guest Speaker on Key Topics (example: Annual Giving Visit during Phone Program, etc.)
- Other



## **Annual Giving Program**

The Annual Giving Program provides alumni, employees and friends the opportunity to provide UAF students with extraordinary opportunities for discovery and learning. As important as the funds are, equally significant is the spirit and generosity they represent. Annual giving is often the starting point – and therefore the foundation – for a lifetime of giving. The tradition of giving back is what Annual Giving is building in an effort to support the students of today – tomorrow's leaders. The FY14 University of Alaska Fairbanks Annual Giving program will focus on five areas:

### **Annual Fund (40825) Support**

- The calendar year-end appeal and the fall phonathon will ask non-donors to support the Annual Fund.
- The employee giving program will highlight the impact made by donations to the Annual Fund.
- For all appeals, if a donor's last gift was to the Annual Fund, the donor will be asked to renew their support.

### **College & School Support**

- The February college and school appeal and the spring phonathon will ask non-donors to support their alma mater college or school dean's fund.
- The employee giving program will highlight the impact made by donations made in support of UAF's colleges and schools.
- For all appeals, if a donor's last gift was to a dean's fund, the donor will be asked to renew their support of that fund.

### **Restricted Support**

- The September kick-off appeal, fiscal year-end appeal and the fall and spring phonathons will focus on renewing and expanding support of restricted funds.
- The employee giving program will highlight the impact made by donations to restricted funds.

### **Culture of Philanthropy at UAF**

- The employee giving campaign will be modified to a year-long campaign format. Throughout the year, employees will be motivated and inspired to donate to UAF via different media modes. This campaign will only contain soft asks.

### **Stewardship and Fulfillment**

- In addition to the stewardship conducted by the Donor Relations team, the Annual Giving team will focus on donor retention by initiating an improved new-donor welcome plan.
- All new Annual Giving donors will receive a thank you call from either the Director or the Coordinator.

In FY13 the Annual Giving program raised over \$400,000 from almost 1,000 donors. Based on historical data, the dollar goal for FY14 is to raise \$375,000. The donor goal, based on a 5% increase on the five-year average, will be 1,040.

## Metrics and Giving Projections

FY14 Goal	4 year projections
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		annual % projected increase for	FY15	FY16	FY17	FY18	TOTAL
<b>**Fundraising Goal - TOTAL</b>	<b>\$8,000,000</b>	<b>9-11%</b>	<b>\$9,000,000</b>	<b>\$10,000,000</b>	<b>\$11,000,000</b>	<b>\$12,000,000</b>	<b>\$50,000,000</b>
Initiative	2,700,000		\$3,575,000	\$3,575,000	\$3,575,000	\$3,575,000	\$17,000,000
Annual	5,300,000		\$5,425,000	\$6,425,000	\$7,425,000	\$8,425,000	\$33,000,000
**Individual giving: % of total \$ raised	26%	2%	28%	30%	32%	34%	
<b>Number of Donors</b>	<b>4,600</b>	<b>8%</b>	<b>4,968</b>	<b>5,365</b>	<b>5,795</b>	<b>6,258</b>	
**Alumni Participation - % increase	4.6%	0.50%	5.10%	5.60%	6.10%	6.60%	
<b>**Annual Giving</b>	<b>\$375,000</b>	<b>10-13%</b>	<b>\$425,000</b>	<b>\$475,000</b>	<b>\$550,000</b>	<b>\$600,000</b>	
**Donor Retention	40%	5%	45%	50%	55%	60%	
<b>Number of Faculty/Staff Donors</b>	<b>610</b>	<b>5%</b>	<b>641</b>	<b>673</b>	<b>706</b>	<b>742</b>	
<b>**Proposals</b>	<b>102</b>	<b>3-5%</b>	<b>106</b>	<b>110</b>	<b>113</b>	<b>118</b>	
**Individual	31	5%	33	34	36	38	
**Corporate and Foundation	71	3%	73	75	78	80	
<b>Contact Reports</b>	<b>747</b>	<b>3%</b>	<b>769</b>	<b>792</b>	<b>816</b>	<b>841</b>	
<b>New Donors</b>	<b>1,247</b>	<b>8%</b>	<b>1347</b>	<b>1455</b>	<b>1571</b>	<b>1697</b>	
<b>Upgraded Donors</b>	<b>2,103</b>	<b>5%</b>	<b>2208</b>	<b>2319</b>	<b>2435</b>	<b>2556</b>	
<b>**New Legacy Society Members</b>	<b>5</b>	<b>30%</b>	<b>7</b>	<b>8</b>	<b>11</b>	<b>14</b>	
<b>**Gifts over \$25K</b>	<b>80</b>	<b>3-5%</b>	<b>83</b>	<b>86</b>	<b>88</b>	<b>91</b>	
**Individual (% increase)	16	5%	17	18	19	19	
**Corporation and Foundation (% increase)	64	3%	66	68	70	72	

Projected monetary goals for FY15-18 are projected based on staff growth model and  
centennial celebration opportunities.

Proposal and Contact Report goals based on MGO expectations and Prospect Management and  
Tracking System guidelines.

Other metrics based on historical giving data (annual averages) from FY08 - FY13.

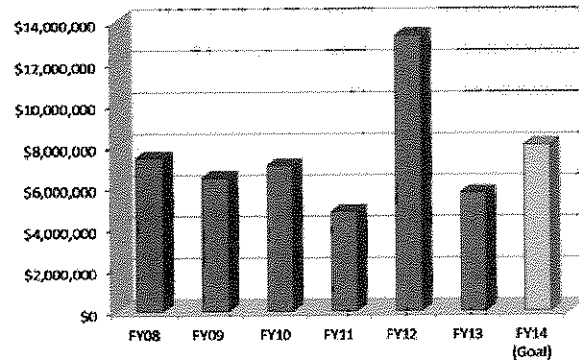
\*\* Indicates UA Foundation Coordinated Metrics.

	UAF Development Metrics (FY08 - FY13)					
	FY08	FY09	FY10	FY11	FY12	FY13
<b>Dollars Raised (All)</b>	<b>\$7,397,865</b>	<b>\$6,427,903</b>	<b>\$7,021,441</b>	<b>\$21,602,935</b>	<b>\$19,241,933</b>	<b>\$10,190,631</b>
<b>Dollars Raised (philanthropic)</b>	<b>\$7,397,865</b>	<b>\$6,427,903</b>	<b>\$7,021,441</b>	<b>\$4,788,779</b>	<b>\$13,289,740</b>	<b>\$5,700,468</b>
<b>Number of Donors</b>	<b>3,203</b>	<b>3,225</b>	<b>3,428</b>	<b>3,645</b>	<b>3,835</b>	<b>4,392</b>
<b>Number of Faculty/Staff Donors</b>	<b>407</b>	<b>502</b>	<b>589</b>	<b>563</b>	<b>576</b>	<b>581</b>
<b>Proposals</b>	<b>37</b>	<b>44</b>	<b>44</b>	<b>49</b>	<b>60</b>	<b>67</b>
<b>Contact Reports</b>	<b>140</b>	<b>255</b>	<b>182</b>	<b>185</b>	<b>269</b>	<b>581</b>
<b>New Donors</b>	<b>857</b>	<b>796</b>	<b>956</b>	<b>952</b>	<b>900</b>	<b>1,188</b>
<b>Upgraded Donors</b>	<b>1429</b>	<b>1420</b>	<b>1,481</b>	<b>1,721</b>	<b>1,796</b>	<b>2,003</b>
<b>New Legacy Society Members</b>	<b>10</b>	<b>11</b>	<b>8</b>	<b>12</b>	<b>5</b>	<b>4</b>
<b>Gifts over \$25K (philanthropic)</b>	<b>45</b>	<b>32</b>	<b>30</b>	<b>40</b>	<b>62</b>	<b>50</b>

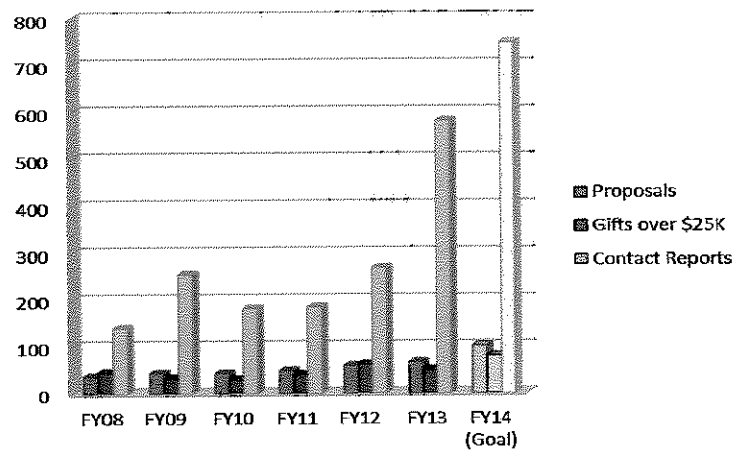
\*Effective FY11, private grants are included

## Metrics and Giving Projections -continued-

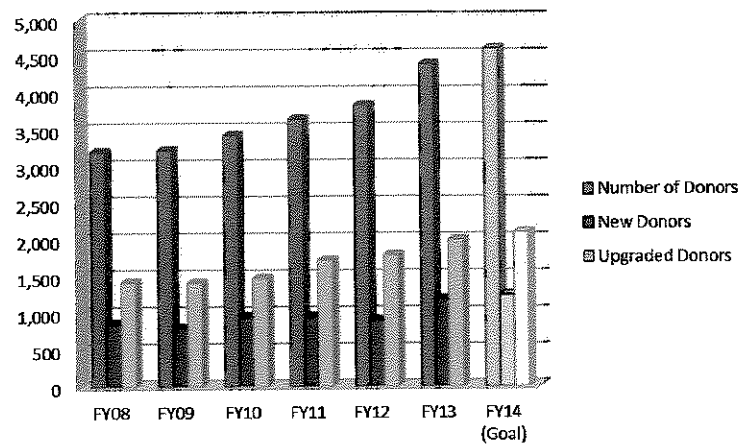
### Dollars Raised



### Major Gift Metrics



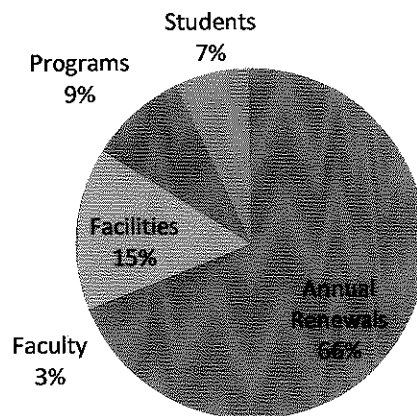
### Donors



## UAF-Wide Initiatives and Fundraising Goal

The goals represent estimated campus-wide annual renewals as well as long-range fundraising initiatives: Troth Yeddha' Park, Engineering/Energy, Ted Stevens' Project and R/V Sikuliaq. Individual college/school/unit funding needs and donor-centric opportunities are available on the following page.

	FY14 Annual Goal	% of FY14 Goal	Completion Goals (Initiatives) FY14-FY18	% of Goal
<b>Students</b>	\$ 550,000	7%		
Scholarship (new schol. & increasing existing endowments)	\$ 325,000	4%		
Fellowship (5 @ \$45K)	\$ 225,000	3%		
<b>Programs</b>	\$ 750,000	9%	\$ 2,000,000	12%
R/V Sikuliaq	\$ 500,000	6%	\$ 1,500,000	9%
Outreach (RAHI/ASRA, etc.)	\$ 150,000	2%		
Ted Stevens Project	\$ 100,000	1%	\$ 500,000	3%
<b>Facilities</b>	\$ 1,200,000	15%	\$ 14,000,000	82%
Energy/Engineering	\$ 500,000	6%	\$ 8,000,000	47%
Ted Stevens Project	\$ 200,000	3%	\$ 5,000,000	29%
Troth Yeddha' Park	\$ 500,000	6%	\$ 1,000,000	6%
<b>Faculty</b>	\$ 200,000	3%	\$ 1,000,000	6%
Ted Stevens Project	\$ 200,000	3%	\$ 1,000,000	6%
<b>Annual Renewals</b>	\$ 5,300,000	66%		
Scholarship Renewal/Annual Fund/Major Gift Renewal (\$2.5M Annual + \$2M Engineering)	\$ 4,500,000	56%		
KUAC	\$ 800,000	10%		
<b>TOTAL</b>	<b>\$ 8,000,000</b>	<b>100%</b>	<b>\$ 27,000,000</b>	<b>100%</b>



**FY14 Annual Goals**

## College/School/Unit Priority Funding Needs Donor-Centric Opportunities

The below goals represent Individual College/School/Unit funding priorities, above and beyond the UAF-wide initiatives and fundraising goal.

UAF College/School/Unit	FY14 Goal						Long Range Goal
	TOTAL	Student	Program	Facilities	Faculty	Renewals	
College of Engineering and Mines	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ -	\$ 10,000,000
CEM/ACEP Engineering/Energy facility (over 2 years)							\$ 10,000,000
Scholarships (4-6 schol that award \$2,500/yr)/Mendenhall		\$ 25,000					
Student Enhancement Fund		\$ 25,000					
Student Competitions		\$ 50,000					
ChemE Program							TBD
College of Liberal Arts	\$ 425,000	\$ 55,000	\$ 320,000	\$ -	\$ -	\$ 50,000	\$ 125,000
Tordoff Scholarship		\$ 50,000					
Knutson Memorial Scholarship		\$ 5,000					\$ 25,000
Alaska Piano E-Competition			\$ 300,000				
Western History Association			\$ 20,000				\$ 100,000
CLA Renewals						\$ 50,000	
College of Natural Science and Mathematics	\$ 550,000	\$ 137,500	\$ 137,500	\$ 137,500	\$ 137,500	\$ -	
Student Support (Scholarship/Fellowship/Research/Travel/Fieldwork)		\$ 137,500					
Equipment Enhancement (Field & Lab Equip/AIL/Video Conf Equip/Computers)				\$ 137,500			
Veterinary Medicine Program			\$ 137,500				
Faculty Support (research/Travel and Professional Development)					\$ 137,500		
School of Fisheries and Ocean Sciences	\$ 1,300,000	\$ 390,000	\$ 135,000	\$ -	\$ 340,000	\$ 435,000	
Graduate Student Support		\$ 50,000					
Sikuliq Exhibit			\$ 65,000				
National Ocean Sciences Bowl			\$ 70,000				
Research Support		\$ 340,000			\$ 340,000		
SFOS Renewals						\$ 435,000	
College of Rural and Community Development	\$ -	\$ -	\$ 250,000	\$ -	\$ -	\$ -	\$ 5,000,000
Rural Alaska Honors Institute			\$ 250,000				
MacLean House							
Troth Yeddha'							\$ 5,000,000
School of Education	\$ 100,000	\$ 80,000	\$ -	\$ 20,000	\$ -	\$ -	\$ -
Scholarships		\$ 30,000					
Rural Practicum Support		\$ 30,000					
Rural Supervision		\$ 20,000					
Assistive Technology for Special Education and Masters Program				\$ 20,000			
School of Management							
TBD							
School of Natural Resources and Agricultural Science	\$ 2,200,000	\$ 50,000	\$ -	\$ 150,000	\$ -	\$ -	\$ 2,000,000
Student Scholarships		\$ 50,000					
Georgeson Botanical Garden				\$ 150,000			\$ 2,000,000
GBG Drew Amphitheater							
Rasmuson Library	\$ 675,000	\$ -	\$ 200,000	\$ 225,000	\$ 200,000	\$ 50,000	\$ 7,250,000
Ted Stevens Papers Project			\$ 150,000				\$ 2,000,000
Library of Congress Native Language Consortium			\$ 50,000				\$ 150,000
Ted Stevens Papers Project /Capital				\$ 200,000			\$ 5,000,000
Learning Commons				\$ 25,000			\$ 100,000
Ted Stevens Papers Project/Positions					\$ 200,000		
Dean's Discretionary Fund						\$ 50,000	
UA Museum of the North	\$ 305,000	\$ -	\$ 255,000	\$ 50,000	\$ -	\$ -	\$ 3,000,000
Bison Past and Present Exhibit (UA Museum of the North)			\$ 55,000				
Hadrosaur Pod Exhibit (UA Museum of the North)			\$ 100,000				
Evolution: Special Exhibition (UA Museum of the North)			\$ 100,000				
Renovation of the Gallery of Alaska (UA Museum of the North)							\$ 3,000,000
Family Room (UA Museum of the North)				\$ 50,000			
Athletics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000
Human Performance Lab/Weight Room							\$ 3,000,000
GI/IAB/IARC							\$ -
TBD							
<b>TOTAL</b>	<b>\$5,655,000</b>	<b>\$812,500</b>	<b>\$1,297,500</b>	<b>\$562,500</b>	<b>\$677,500</b>	<b>\$535,000</b>	<b>\$ 30,375,000</b>

# A Donor Bill of Rights

*PHILANTHROPY* is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

## I.

*To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*

## II.

*To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.*

## III.

*To have access to the organization's most recent financial statements.*

## IV.

*To be assured their gifts will be used for the purposes for which they were given.*

## V.

*To receive appropriate acknowledgement and recognition.*

## VI.

*To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.*

## VII.

*To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*

## VIII.

*To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*

## IX.

*To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*

## X.

*To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

### DEVELOPED BY

Association of Fundraising Professionals (AFP)  
Association for Healthcare Philanthropy (AHP)  
Council for Advancement and Support of Education (CASE)  
Giving Institute: Leading Consultants to Non-Profits

### ENDORSED BY

(in formation)  
Independent Sector  
National Catholic Development Conference (NCDC)  
National Committee on Planned Giving (NCPG)  
Council for Resource Development (CRD)  
United Way of America

## **UAF Fundraising Coordination Policy**

### **Introduction:**

UAF Development recognizes the importance of coordinating fundraising for UAF and its units and is committed to donor-centric fundraising practices. In collaboration with the Development office and your unit development officer (if applicable), we encourage UAF faculty and staff to develop relationships and engage potential donors with programs at UAF. Ideally, everyone on campus should be working towards engaging potential philanthropic partners with UAF and it will require participation by all in order to be successful in raising significant philanthropic support for students, research and programs. However, **communication and coordination are vital to our success in fundraising as an institution.** To that end, it is UAF policy that all UAF employees, students and volunteers contact UAF Development when they are building donor relationships and before making solicitations (of monetary or in-kind donations) to foundations, corporations, businesses or individuals.

### **Background and justification:**

Private giving provides UAF with critical funds that provide a level of excellence that would not be possible otherwise. UAF provides academic programs ranging from certificates to advanced level PhDs. UAF Development's primary responsibility is to build donor relationships with the goal of raising private funds from corporations, foundations and individuals to support UAF's mission of education, outreach and research. The goal is to match university priorities with donors' interest (donor-centric model) to create a sustainable, mutually beneficial partnership. A strong understanding of UAF's mission and priorities is needed to accomplish annual fundraising goals - and collaboration with UAF leadership is essential. In addition to its work with the Chancellor and UAF departments and programs, UAF Development collaborates with the UA Foundation, as well as other MAUs to coordinate fundraising communication and to ensure that the University is coordinating donor approaches and strategies. The Foundation manages a Prospect Management and Tracking System (PMATS) and all MAUs are required to follow these guidelines. Based on industry standards, it can generally take 18 months to cultivate donor relationships that result in a major gift (\$25,000+). Failure to plan and coordinate appropriately can represent the University poorly, potentially damage donor relationships and ultimately result in no funding.

### **Definitions:**

- UA Board of Regents Policy 05.14
- University Regulation 05.14
- UA Foundation Prospect Management and Tracking System (PMATS) Policies and Procedures

### **References Relied Upon:**

The UAF Development Office, in partnership with the UAF Chancellor and Deans/Directors, creates and manages the fundraising plan for UAF. This plan is based on UAF departmental funding priorities, as well as needs and initiatives set forth by the UAF Chancellor. For a summary of this year's priorities and goals, please contact Emily Drygas, Director of Development, at 907-474-6631 or via email at [emily.drygas@alaska.edu](mailto:emily.drygas@alaska.edu).

The **primary vehicles** in place to raise philanthropic funds at UAF are:

1. Annual giving program
2. Scholarship program (400-plus privately funded scholarships)
3. Major gift program (to include planned giving).

### **Statewide Collaboration**

All charitable gifts to the University must be received via the UA Foundation. According to Board of Regents Policy (05.14) and University Regulation (05.14) "The solicitation and acceptance of charitable gifts for the benefit of the University of Alaska will be done in manner that yields the greatest possible outcome for the University and the donor. Regents' Policy requires that all solicitations be coordinated through the Statewide Office of Development, in accordance with the process established through the Prospect Management and Tracking System."

### **UAF's Role**

The UAF Development Office and/or your unit development officer will collaborate with Statewide Development on your behalf to coordinate all UAF efforts in managing donor relationships within the Prospect Management and Tracking System.

### **Responsibilities**

**Communication and coordination are vital to our success in fundraising as an institution.** We all play a part in representing UAF positively and engaging potential donors. With that comes a responsibility to UAF supporters to communicate with each other internally and present a consistent message. All UAF employees and students who are working towards current or future fundraising goals and are planning to solicit private philanthropic support for UAF need to contact UAF Development **before** solicitations are made. UAF Development can help ensure a united message, and ensure that donors are recognized appropriately. UAF Development can work with you to strategize best fundraising approaches, communicate with other departments at UAF and other MAUs, and help navigate Foundation procedures when gifts are made to the University.

### **Non-Compliance**

In order to ensure coordination with UAF donors, **we need to work together as an institution.** It is imperative that UAF departments communicate with each other and with UAF Development regarding strategies and approaches with donors. When the university is not coordinated in its fundraising messaging, donors are often frustrated and proposals are not funded. In addition, failure to coordinate may result in:

- Departmental budget reallocation by the chancellor
- Prospect (donor) reassignment by the foundation

### **Exceptions**

In some cases, donors will approach departments directly (unsolicited) regarding support for individual units. When this happens, contact UAF Development with updates. Development can keep the Foundation and other MAUs up to date on donor intent and activities within the UAF campus.

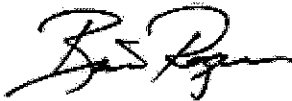


### **Procedures**

If your program, unit or department has a fundraising need, take the following steps:

1. First, contact your department leadership (dean, director, etc.), department development officer (if applicable), or the vice chancellor for university advancement to determine if the program is a **fundraising priority** for your college, school or department.
2. Once your department has identified your program as a fundraising priority, **identify** potential donors and supporters that are closest to your program.
  - Who are you interested in asking to support your program and why?
  - What is your timeline? When will you need funding? (Reminder: major gifts can take an average of 18 months to cultivate.)
  - Is anyone else at UAF potentially working/communicating with these donors?
3. Contact the **UAF development director** or your unit **development officer** as you are building donor relationships and **before** you solicit anyone (foundation, corporation, local business or individual) on behalf of UAF.
  - This will help limit duplicate or overlapping requests to key UAF donors and ensures comprehensive fundraising coordination throughout UAF.
4. **Collaborate** with UAF Development to reach fundraising success. Development staff can help you strategize by:
  - Coordinating your fundraising efforts with others at UAF to present a coordinated message to potential donors.
  - Choosing the best timing, mechanism, and ask amount for the most effective results.
  - Researching potential donors that may be interested in your programs.
  - Providing valuable tax credit information that may assist corporate donors with their giving.
  - Assisting with helping to ensure all donors are thanked for their support of UAF.

### **Policy Approved By**



Brian D. Rogers, Chancellor  
University of Alaska Fairbanks

## Guide to Fundraising at UAF

Raising philanthropic support for the university takes a coordinated effort by all those involved. As such, a fundraising guide has been established to help your program, unit or department in its fundraising needs. For more information please see UAF's Fundraising Coordination Policy.

1. First, contact your department leadership (dean, director, etc.) or development officer (if applicable) to determine if the program is a **fundraising priority** for your college, school or department.
2. Once your department has identified your program as a fundraising priority, **identify** potential donors and supporters that are closest to your program.
  - Who are you interested in asking to support your program and why?
  - How would you ask (mail, phone, in-person meetings)?
  - What is your timeline? When will you need funding? How much funding do you need and for how long? Reminder: major gifts (\$25k+) can take an average of 18 months to cultivate.)
  - Is anyone else at UAF potentially working/communicating with these donors?
3. Determine to which **UA Foundation fund** donors will be giving.
  - Is there a fund at the UA Foundation that supports your program or will one need to be created?
  - If one needs to be created, should it be restricted to the current project or support the general needs of your program, unit, or department? What will be the source of the initial \$500 start-up funding?
4. Contact the **UAF Development Director** or your unit **Development Officer** as you are building donor relationships and **before** you solicit anyone (foundation, corporation, local business or individual) on behalf of UAF.
  - This will help limit duplicate or overlapping requests to key UAF donors and ensures comprehensive fundraising coordination throughout UAF.
5. **Collaborate** with UAF Development to reach fundraising success. Development staff can help you strategize by:
  - Coordinating your fundraising efforts with others at UAF to present a coordinated message to potential donors.
  - Choosing the best timing, mechanism, and ask amount for the most effective results.
  - Researching potential donors that may be interested in your programs.
  - Providing valuable tax credit information that may assist corporate donors with their giving.
  - Assisting with helping to ensure all donors are thanked for their support of UAF.



## FACILITIES NAMING GUIDELINES

### INTRODUCTION

The Facilities Naming Guidelines have been developed to provide a fair and consistent process for naming of permanent facilities and other campus features on all University of Alaska Fairbanks campuses, and for interior and exterior building locations. The guidelines ensure that proper review and consultation occur prior to any naming decisions being made.

All naming requests shall be initiated by first contacting the UAF Development Office. Since naming requests for facilities are only one of many ways to recognize individuals and/or benefactors, the Development Office has the broad-based knowledge to present all opportunities relative to requests. These guidelines do not cover naming of programs, scholarships, endowed chairs, recognition of service, etc. These options are under the oversight of the Development Office.

### DEFINITION OF FACILITIES

Any building or part therein, structure, street, drive, landscaped area (including natural features such as groves of trees), open space (including trails), physical improvement, or other property under the administrative control of the University. Temporary facilities, such as modular structures, will not be named, other than with placeholder identification.

### TYPES OF FACILITIES

**Primary facility:** Any large or prominent facility that supports the institutional mission, including academic and research buildings and/or community service-focused buildings and prominent interior spaces such as auditoriums, lobby areas, and libraries.

**Secondary facility:** Any facility that does not fit the definition of primary facility. Such facilities would include classrooms, studios, laboratories, and other work

spaces. Secondary facilities are used primarily to support institutional functions such as teaching, research and institutional service.

**Primary exterior facility:** Any significant campus feature, such as parks, open spaces, recreation areas, plazas, roads, and major walkways and trails. Primary exterior facilities do not need to be connected or in close proximity to, primary or secondary facilities.

**Secondary exterior facility:** These would include primarily landscape features (trees, small gardens), lesser trails, outdoor seating areas and furniture such as benches.

#### CATEGORIES OF NAMES

**Placeholder name:** a temporary name that is given to a facility that is used during the planning, development and construction of the facility.

**Requirements:** *The placeholder name must be descriptive of the facility function, like Life Sciences, or simply numeric, such as T12. Following completion, the placeholder name will be replaced with one of the following name categories, as appropriate.*

**Institutional name:** a semi-permanent name that is descriptive or decorative. The Master Planning Committee will review institutional name suggestions and pass on recommendations to the Chancellor. An example would be what was, for many years, the Natural Sciences Facility, but was then replaced by an honorary name, the Reichardt Building.

**Requirements:** *An institutional name may be permanent or can remain in effect until such time as it is replaced by an honorary, commemorative or benefactor name.*

**Honorary name:** a permanent name for a facility that honors an individual (or individuals) who is still living and has made extraordinary contributions to UAF, the state of Alaska, the nation or the world or who has served UAF in an academic capacity and has earned a national or international reputation for preeminent achievements in teaching, research or civic service while employed at UAF or associated with municipal, state or federal government.

**Requirements:** *Retired or former members of the University faculty, staff, or administration shall have been retired, or a former employee, for a minimum of two years for primary facilities or one year for secondary facilities before he/she may be considered for such distinction. Public officials are not eligible for consideration while in office or for a minimum of 2 years following their service.*

**Commemorative name:** a permanent name for a facility that honors an individual (or individuals) who is deceased and made extraordinary contributions to UAF, the state of Alaska, the nation or the world or who has served UAF in an academic capacity and has earned a national or international reputation for preeminent achievements in teaching, research or civic service while employed at UAF or associated with municipal, state or federal government.

**Requirements:** *Nominees in this category must be deceased for at least two years for primary facilities or one year for secondary facilities prior to being considered for such distinction.*

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***Benefactor Name:*** a permanent name for a facility that recognizes an individual donor or donors) who have made major gifts to the university. This includes an honoree(s) nominated by such a donor. (See addendum: Naming opportunities for Benefactors)

***Requirements:*** *Benefactor naming recognizes donors who have made significant gifts to UAF that are in accordance with the policies and guidelines of the UAF Development Office.*

#### **RENAMING, NAME ADDITION, REMOVING NAMES**

Under special circumstances, facilities can be renamed, have additional name (s) added, or a name can be removed for the following reasons:

- Buildings that are destroyed by natural disasters but re-built in the same location and for the same purpose can retain the earlier name or be renamed according to the guidelines. UAF administration will be responsible for contacting the earlier donor(s) or honorees as to their preference;
- Buildings that are demolished due to age will not have the name carry over to a newly constructed building on the same site; however, historic plaques indicating the previous building and name may be installed near the site to acknowledge the naming;
- A building that is significantly altered through renovation and/or additional space can have its name altered to recognize any significant gifts by new donors. Appropriate recognition of earlier donors/honorees will be included in the new/altered facilities;
- UAF retains the right to remove any name for reasons of non-payment of a pledge or failure to fulfill the terms of a gift-acceptance agreement;
- UAF may remove the name of a donor/honoree if the individual is convicted of a felony or, in the estimation of the BOR, has exhibited behaviors that are not in keeping with what is considered exceptional distinction.

### NAMING AUTHORITY

The following table identifies types of facilities, naming categories, and naming authority. In accordance with Board of Regents Policy 05.12.080, any gift of \$25,000 or less will be approved by the Chancellor and any gift of a greater amount must be approved by the UA President for final approval by the Board of Regents.

Facility Type Naming Category	Primary	Secondary	Exterior	Secondary Exterior
Placeholder	Master Planning Committee	N/A	Master Planning Committee	N/A
Institutional	Chancellor	Chancellor	Chancellor	Chancellor
Honorary	Board of Regents	Chancellor	Board of Regents	Chancellor
Commemorative	Board of Regents	Chancellor	Board of Regents	Chancellor
Benefactor	Board of Regents	Major Gift (>\$25K) BOR, Chancellor (<\$25k)	Board of Regents	Major Gift (>\$25K) BOR, Chancellor (<\$25k)

### CHANCELLOR'S ADVISORY COMMITTEE FOR THE NAMING OF CAMPUS FACILITIES

The Chancellor's Advisory Committee (CACNCF) was officially formed in March 2010. Membership includes representation from Faculty Senate, Development, University Planning, Facilities, Staff Council, and ASUAF. As per the Chancellor's memo of 3/31/2010, "This standing advisory committee exists in accordance with Board of Regents Policy 05.12.080. The committee is responsible for making recommendations to me as to the naming of UAF facilities, improvements, and other campus areas; as well as naming opportunities for gifting and development purposes."

### NOMINATION PROCESS

A nomination form must be completed and submitted to the UAF Development Office, with copy to the Chancellor's office, for review (see exhibit below). The Development Office will forward the request to the CACNCF, who will then review the proposal and forward it to the Chancellor with a recommendation either for approval or denial, based on the criteria as set forth in the guidelines. The Chancellor is responsible for taking any nominations to the Board of Regents.

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Naming nomination form to provide the following information:

1. Facility location (include GPS coordinates if available)
2. Facility type: Primary\_\_ Secondary \_\_ Primary Exterior \_\_ Secondary Exterior \_\_
3. Current Facility name (if applicable):
4. Facility use:
5. Naming Category: Institutional\_\_Honorary\_\_ Commemorative\_\_Benefactor\_\_
6. Requested Name:
7. Justification for naming consideration:
8. Please include an honoree dossier (for honorary and commemorative naming)
9. UAF affiliate retirement date (if applicable): Date of death (commemorative naming):
10. Authorized signature of family or legal representative for commemorative naming:
11. Submitted by:
12. Affiliation:
13. Date:

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*Note: Any proposed names must be in conformance with UA Regents's Policy, Chapter 05.12.080 copied below for reference.*

**P05.12.080. Naming of Campus Facilities: Formal Naming of Campus Facilities and Infrastructure.**

- A. Official naming of all "significant" buildings, building subcomponents such as wings, additions, auditoriums, and libraries, streets, parks, recreational areas, plazas and similar facilities or sites will be approved by the board. These facilities, improvements and areas will generally be named to honor or memorialize specific individuals, groups, events, places, or objects of historic, geographic, cultural, or local significance, including the following:
  - 1. Former members of the board and the University of Alaska Foundation's Board of Trustees;
  - 2. Distinguished former university presidents, chancellors, faculty, staff, and alumni of the university;
  - 3. Distinguished Alaskans and others who have made outstanding contributions to society, the nation, the state, or the university;
  - 4. Contributors of substantial financial or other support to the university, including donations provided for under P05.14.080; and
  - 5. Alaska rivers, mountains, flora, fauna, cities, or communities.
- B. Each chancellor shall establish standing or ad hoc advisory committees to make recommendations on the naming of facilities, improvements and other areas of the campus, and to help identify naming opportunities for gifting and development purposes. Recommendations for a naming to honor or memorialize an individual shall be confidential to the maximum extent permitted by law.
- C. Unless otherwise directed by motion of the board, the name of an existing facility, improvement or area, which was named in honor of or to memorialize a specific individual, group, event, place, or an object of historic, geographic, cultural, or local significance, will remain for the life of the facility or improvement. Unless specifically authorized by the board, the name of a facility to be demolished will not be transferred to a new facility.
- D. The president is authorized to determine which namings will be considered "significant" for purposes of approval by the board. In making that determination, the president shall consider the type, location, usage, condition, and value of the facility or area to be named; the individual, event or other to be memorialized; and the compatibility of the name with the facility or other improvement.
- E. The board reserves the right to rename any facility when, in its sole discretion, it determines that the renaming is in the best interest of the university.

(06-10-04)

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# **Addendum**

## **University of Alaska Fairbanks (UAF) Naming Opportunities for Benefactors Procedures and Guidelines**

### **Request Procedure:**

All benefactor naming requests for facilities shall be first submitted in writing to the UAF Development office for review. The Development Office will forward the request to the Chancellor's Advisory Committee for the Naming of Campus Facilities, who will review it and forward to the Chancellor with their recommendation. . The request shall contain justification compliant with the criteria and objectives outlined in the Board of Regents policy on naming of campus facilities (P05.12.080).

The Chancellor shall submit his/her recommendation, along with supporting information, to the Board of Regents (through the President of the University of Alaska) only after 51% of the gift/pledge has been secured by the University. No publicity shall be given for the naming opportunity until it has been approved by the Board of Regents.

### **Naming Criteria:**

UAF will consider a naming opportunity to recognize a substantial financial contribution consistent with institutional priorities. Naming opportunities that are in honor of philanthropic pledges will be approved on the contingency that the pledge is fulfilled.

A substantial gift is defined as the following:

- 51% of the private funds necessary for the building project;
- 51% of the estimated costs of new construction and/or 30% of current replacement value of building.

### **Dedication Ceremony:**

Upon approval of the naming opportunity by the Board of Regents, a dedication ceremony may be planned and conducted. All building plaques must conform to UAF campus guidelines in size, design, location, materials and content (to include font).

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## **Funding Levels to Provide Named Opportunities:**

### **Primary Facility**

The University of Alaska Fairbanks complies with the Regents' recommended levels. Minimum requirements will be based on current costs at the time of the naming request, but not less than \$1 million.

Opportunities in this category include:

- Named Academic/Research Facility
- Named Community-Service Focused Facility
- Named Auditorium\*
- Named Lobby\*
- Named Library

\*Gift requirements for the naming of individual rooms in new or existing buildings, such as auditoriums, lecture halls, and lobbies, shall be approved on a case-by-case basis (see Board of Regent Policy, P05.14.080) with consideration to size and location. Individual rooms may also be considered as a secondary facility.

### **Secondary Facility**

The University of Alaska Fairbanks complies with the Regents' recommended levels. Minimum requirements will be based on current costs at the time of the naming request, but not less than \$25,000.

Opportunities in this category include:

- Classrooms
- Studios
- Laboratories
- Other work spaces

### **Primary Exterior Facility**

The University of Alaska Fairbanks complies with the Regents' recommended levels. Minimum requirements will be based on current costs at the time of the naming request, but not less than \$50,000.

Opportunities in this category include:

- Parks

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- Open Spaces
- Recreation Areas
- Plazas
- Roads
- Major Walkways
- Major Trails

### **Secondary Exterior Facility**

The University of Alaska Fairbanks complies with the Regents' recommended levels. Minimum requirements will be based on current costs at the time of the naming request, but not less than \$5,000.

Opportunities in this category include:

- Trees or Other Landscape Features
- Small Gardens
- Lesser Trails
- Outdoor seating areas
- Furniture, e.g., benches

*Note: All requests for the naming of primary and secondary exterior facilities will also be reviewed by the UAF Master Planning, Campus Landscaping and Outdoor Art Subcommittee to determine locations and logistics for the naming of existing and new installations.*

*\*\*Note: For additional naming opportunities, benefactors may also consider the following: Fellowship, Chair, Curatorship, Named Scholarships ("in honor of" and "in memory of"), lecture series, named event or program. For more information on these naming opportunities, please contact the UAF Development office at 907-474-2619.*

*This policy will be reviewed every two years.*

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## University of Alaska Fairbanks (UAF)

### Naming Opportunities for Benefactors/Donors

UAF will consider a naming opportunity to recognize a substantial financial contribution consistent with institutional priorities. Naming opportunities that are in honor of philanthropic pledges will be approved on the contingency that the pledge is fulfilled.

A substantial gift is defined as the following:

- 51% of the private funds necessary for the building project;
- 51% of the estimated costs of new construction and/or 30% of current replacement value of building.

NAMING OPPORTUNITY	MINIMUM GIFT	COMMENT
<b>Campus Facilities</b>		<b>Requires Board of Regents Approval</b>
Primary Facility, Buildings, or Wings	\$1M	For existing facility, gift may be unrestricted (e.g. to support overall University needs) or go to endowment to support associated programs within the facility. For new facility, gift may be unrestricted, go to endowment to support associated programs within facility, or be designated to construction costs. The same guidelines apply to athletic facilities. A range of options is available.
<b>Other Campus Facilities</b>		<b>Requires Board of Regents Approval if &gt;\$25,000, Requires Chancellor Approval if &lt;\$25,000</b>
Classrooms, Laboratories, Seminar Rooms, Conference Rooms, Offices, and Similar Spaces	\$25,000	A range of options is available.
<b>Primary Exterior Opportunities</b>		<b>Requires Board of Regents Approval</b>
Parks, open spaces, recreation, etc.	\$50,000	A range of options is available.
<b>Other Exterior Opportunities</b>		<b>Requires Board of Regents Approval if &gt;\$25,000, Requires Chancellor Approval if &lt;\$25,000</b>
Trees, small gardens, benches, etc.	\$5,000	A range of options is available.
<b>Other Naming Opportunities</b>		<b>Requires UA Foundation and UAF Approval</b>
Endowed Chair/Professorship	\$2.5 million	Endowment for salary/support of Chair
Named Professorship	\$500,000	Provides support for an outstanding faculty member
Endowed Assistantship/Fellowship	\$45,000	Endowment to support salary supplement for research, teaching, etc.
Endowed Scholarship	\$25,000	Endowment to support student scholarship - \$1,000/yr.
Named Scholarship	\$5,000	Student scholarship - \$1,000/yr. for five years.

For more information, please contact the UAF Development Office at 907-474-2619. Thank you!

## **Memorial Giving at UAF**

A memorial gift offers donors a thoughtful way to remember a loved one and makes a lasting contribution to UAF's vital mission and supporting students. Please contact UAF Development by phone at 907-474-2619 or by email at [UAF-giving@alaska.edu](mailto:UAF-giving@alaska.edu) if you are interested in learning more about memorial funds at UAF. A development officer can help you get started and work with the UAF department, college or school that you would like to assist.

### **Gifts in Memory**

Gifts can be made in memory or honor of a loved one to support any existing funds such as scholarship or program support at UAF. To make a memorial gift in honor of a deceased loved one please make checks payable to the "UA Foundation" and mail to the UA Foundation, P.O. Box 755080, Fairbanks, Alaska 99775. Please include a message briefly noting for whom the gift is "In memory of..." and the existing fund that you would like your gift to support.

### **Named Memorial Funds**

Gifts may also be made to establish new funds at UAF and can be named in memory of a loved one. Below is a list of the common types of funds established at the UA Foundation:

#### **Restricted Fund (not named)**

- Restricted funds may be established in areas of interest to donors in a college, departments or program (including scholarships) for use to be designated by the donor and the signature authority on the fund.
- Minimum Gift: \$500

#### **Restricted Fund (named)**

- Named restricted funds may be established in areas of interest to donors in a college, school or department (including scholarships) for use to be designated by the donor and the signature authority on the fund.
- Minimum Gift: \$5,000

#### **Endowment**

- Endowments may be established in areas of interest to donors in a college, school or department, including scholarships, for use to be designated by the donor and the signature authority on the fund.
- Minimum Endowment Gift: \$25,000 or;
- Minimum Annual Gift: \$5,000 over a five-year period with a pledge commitment.

### **Fund Purpose**

UAF development representatives work with donors as well as UAF departments to determine what purpose the fund will serve at UAF. Common areas of support at UAF include scholarships, fellowships and programs.

### **Gift Timeline**

Named funds and endowments may be established with a one-time gift or via pledge that is fulfilled over a five-year period. There is no limit to the number of donors who can contribute to a memorial fund.

**"In Lieu of Flowers"**

Donors may choose to have gifts directed to UAF in memory of a loved one in lieu of flowers. Please contact UAF Development if you are interested in this option. Below is sample language that can be included to encourage giving in memory of a loved one:

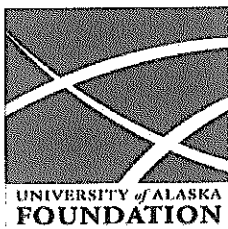
"In lieu of flowers, memorial contributions may be made in memory of NAME to the University of Alaska Fairbanks. Contributions may be made online at [www.uaf.edu/giving/gift](http://www.uaf.edu/giving/gift); please note "In Memory of NAME." Checks can also be mailed to:

**UAF Development  
c/o UA Foundation  
P.O. Box 755080  
Fairbanks, Alaska 99775**

Please make checks payable to "UA Foundation" and include "In memory of NAME" in the note. If you have additional questions, please contact the UAF Development Office at 907-474-2619."

**For more information**

Memorial gifts are a powerful way to honor the memory of someone special. For more information, contact UAF Development at 907-474-2619 or by email at [UAF-giving@alaska.edu](mailto:UAF-giving@alaska.edu).



# **In Kind Gifts of Equipment and Tangible Property Report**

Unit Reporting Gift: \_\_\_\_\_

Contact \_\_\_\_\_ Phone: \_\_\_\_\_

Date	Item or Gift	Dollar Amount and/or Value of the gift	Fair Market Value Method See below	Donor Name and Address	Purpose	Where Gift Kept

Please return completed form and backup to:  
 UA Foundation  
 Advancement Services-Fbks Service Center  
 Butrovich Building, Suite 106  
 P.O. Box 755080  
 Fairbanks, AK 99775  
 Phone: 474-2438 Fax: 450-8031  
[foundation.help@alaska.edu](mailto:foundation.help@alaska.edu)

↑  
**FMV Determination Method:**  
**A:** Appraisal (May be required if above \$5,000)  
**D:** Declared by Donor (preferred)  
**E:** Determined by Expert on Staff  
**C:** Catalog or online auction

## **IMPORTANT:**

The receiving department or Development Office will provide the donor an acknowledgement letter so she/he can use it for their taxes if desired. The donor determines the value of the gift. DO NOT include the value in the letter. The letter should only acknowledge receipt of the gift and thank them for it.

Also, IRS Form 8283 can be completed by the donor if they wish. It must be signed by a Dean/Director of the school or department who received the gift if the value of the gift is greater than \$5,000.

UAF Development Stewardship: Mailings - Notifications - Outreach								
Gifts	Mail Type	Level	Source	Schedule	Produced by	Reviewed by	Signed/Approved by	Updated
Annual Giving - gifts and pledges	Pre-printed TY card	< \$1,000	Daily list from RE	weekly	UAF Development Specialist	AG Director	n/a	annually
Annual Giving - new donors	New Donor packet	< \$1,000	Daily list from RE	weekly	UAF Annual Giving Coordinator	AG Director	n/a	annually
Annual Giving - annual TY postcard	Postcard	all	RE	end of FY	UAF Development Specialist	UAF Development Director	n/a	annually
Annual Giving - phone program, credit card gifts <\$1,000	Pre-printed TY card from Student caller	< \$1,000	Nightly/once gift is received	Nightly/imm ediate	UAF Annual Giving	UAF Annual Giving	UAF AG / Signed by student	annually
Annual Giving - phone program - credit card gifts >\$1,000	Same procedure as above for UAF AG Student callers. In addition UAF Development Specialist prepares a TY letter for signature at the appropriate giving level (see below under Gifts, philanthropic grants, pledges to UAF over \$1,000)							
Annual Giving - phone program, pledge any level	Pre-printed TY card & contribution card	all	Nightly/once gift is received	Nightly/imm ediate	UAF Annual Giving	UAF Annual Giving	UAF AG / Signed by student	annually
Annual Giving - phone program, pledge fulfillment any level	<div> <div>Gifts &lt; \$1,000, see Annual Giving - Gifts and pledges</div> <div>Gifts &gt; \$1,000, see Gifts, philanthropic grants, pledges to UAF &gt; \$1,000</div> </div>							
Gifts & pledges to UAF under \$1,000	Pre-printed UAF TY card	< \$1,000	Daily list from RE	weekly	UAF Development Specialist	UAF Development Director	UAF Development Director	annually
Gifts, philanthropic grants, pledges to UAF over \$1,000	TY letter	\$1,000 - \$4,999	Daily list from RE	weekly	UAF Development Specialist	UAF Development Director	UAF Development Director	annually
	TY letter	\$5,000 - \$9,999		weekly		UAF Development Director	VC for University & Student Advancement	annually
	TY letter	\$10,000 and over		weekly		UAF Development Director	Chancellor	annually
Gifts to College/School	TY letter	all	Gift notification export from RE	weekly	Deans / Directors	Deans / Directors	Deans / Directors	n/a
In memory/honor gifts	pre-printed card	all	mailed	as occurs	UAF Development Specialist	n/a	n/a	n/a
Membership gifts -UAMN, KUAC, etc.	TY letter	all	Respective Department	as occurs	Respective Department	Respective department	Respective department	n/a
Planned Giving (Legacy Society)	TY letter	UAF named in estate plan	UA Foundation	annually	UAF Development Specialist	UAF Development Director	Chancellor	annually
Endowed Chair letter	TY letter	n/a	UAF	annually	UAF Development Specialist	UAF Development Director	Chancellor	annually
PFD- Pick.Click.Give	TY letter	all	UA Adv. Services	annually	UAF Development Specialist	UAF Development Director	UAF Development Director	annually
Recurring gifts	UAF Card	all	UA Adv. Services	start/end	UAF Development Specialist	UAF Development Director	UAF Development Director	annually
Scholarship recipient summary (to donors)	Letter & update	All scholarship fund contacts	UA Adv. Services	annually	UAF Development Scholarship Officer	UAF Development Director	UAF Scholarship Officer	annually
Outreach	Type	Level	Source	Schedule	Produced by	Reviewed by	Signed/Approved by	Updated
Sympathy, Congratulations, etc.	card - to employees, UAF graduates	n/a	UA Adv. Services, news	as occurs	UAF Development Specialist	UAF Development Director	Chancellor	as occurs
Chancellor Report on Philanthropy	to 1K+ donors, leadership, prospects	\$10,000 & above	UAF Development	3x year	UAF Development Specialist	Dev, DOs, Marketing, Chancellor	UAF Development Director & Chancellor	3x yr
Community Snapshots	email to FDNM	as requested	UAF Development	as occurs	UAF Development Specialist	UAF Development	n/a	as occurs
Gift Notifications	email to UAF departments	all	Export from RE	weekly	UAF Development Specialist	Director of Dev. Support	n/a	Weekly
Thank you calls - from Chancellor	Phone call	\$1,000 & >	Gift report		n/a	n/a	n/a	n/a
Thank you calls - from Vice Chancellor	Phone call	\$500 - \$999	Gift report		n/a	n/a	n/a	n/a
UAF Development website	n/a	n/a	UAF & other news sources	as occurs	UAF Development (Dev. Specialist & AG Coordinator)	UAF Development	n/a	as occurs
Athletic sponsorships and in-kind (service) receive recognition and are thanked by the Department. In-kind (tangible) are recognized the same as cash gifts.								
UAF Development Stewardship events including the Chancellor's personal invite, annual Scholarship & Award Breakfast, annual Donor Reception, and Emil Usibelli Awards are above and beyond the stewardship activities reflected above.								



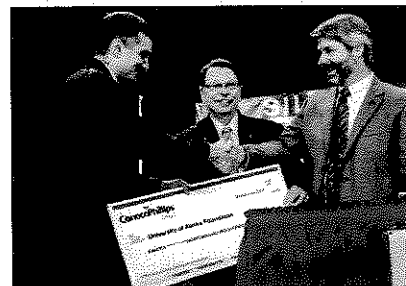
# Chancellor's Report on Philanthropy



Fall 2012

## ConocoPhillips renews commitment to engineering

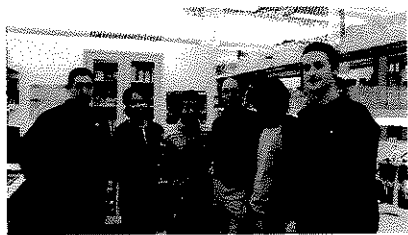
A generous \$200,000 gift from ConocoPhillips will give the College of Engineering and Mines immediate program support. This gift adds to the ConocoPhillips UAF Engineering Endowment established with a \$500,000 gift in 2011. With this endowment, ConocoPhillips is supporting educational opportunities today and providing sustainable resources to CEM, while helping to build Alaska's future workforce. Bij Agarwal, vice president of commercial assets for ConocoPhillips Alaska, said "We are pleased to designate this funding for spending now, in order to more directly and immediately benefit students at UAF." Doug Goering, CEM dean, noted "This generous gift from ConocoPhillips will provide an immediate boost to our ability to outfit our laboratories with state-of-the-art equipment."



Bij Agarwal (l), ConocoPhillips Alaska, presents a check to Chancellor Brian Rogers and Dean Doug Goering.

## Alzheimer's research at UAF

For the second year in a row, the Alzheimer's Disease Resource Agency of Alaska is supporting research taking place at UAF. In 2011, the agency donated \$27,000 to establish the Alzheimer's Resource of Alaska Research Fund. This year, the agency made an additional gift of \$30,000. This support continues their significant commitment to the promising Alzheimer's research in Alaska at UAF's Alaska Basic



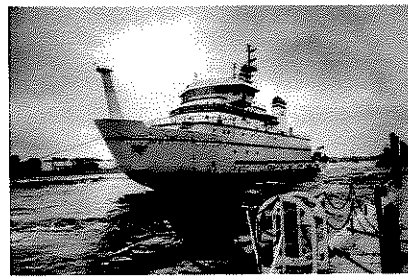
Students Shane Rideout, Yaganen Ataian, Yanzhou Huang, Shailesh Khatri, Jordan Ross in the UAF lab with Dr. Marvin Schulte (third from right). Photo by Shane Rideout.

Neuroscience Program, and helps to facilitate educational opportunities for students. The fund provides support to further explore the disease and students have the unique

opportunity to participate in cutting-edge research on campus. The potential impact of the program is far-reaching, as a major focus is on the development of drugs to improve cognitive abilities in Alzheimer patients.

## R/V Sikuliaq launch moves it closer to its research mission

The R/V *Sikuliaq* splashed into the Menominee River near the shipyard in Marinette, Wis. on Oct. 13, bringing it one step closer to its polar research mission in 2014. The ship is owned by the National Science Foundation and will be operated by UAF. Named for the Inupiaq word meaning "young sea ice," the R/V *Sikuliaq* will be the only ship in the national academic fleet rated for year-round operations in first-year ice. Vera Alexander, dean emerita, and Robert Elsner, professor emeritus, both of the UAF School of Fisheries and Ocean Sciences were co-sponsors of the vessel; Alexander christened the ship while Elsner launched the vessel into the river. Alexander recently pledged a gift of \$25,000 to support a *Sikuliaq* exhibit at the UA Museum of the North scheduled to open in May 2014, and Elsner gave \$10,000 to support the library onboard the vessel.



The 261-foot *Sikuliaq* after the launch from the shipyard in Marinette, Wis.

## Siemens supports programs

On a recent visit to campus, Siemens Industry Inc. representatives learned first-hand about the impacts of their programmatic support. Siemens recently made gifts totaling

\$30,000 to the Siemens Undergraduate Energy Research Support fund for students performing applied energy research at the Alaska Center

for Energy and Power. The partnership offers ACEP student interns hands-on learning opportunities in energy research. In May, Siemens also made a \$25,000 gift to Giving Green Sustainability Initiatives at UAF, including support for a film project at the Sustainable Village, UAF's new student housing. The village will help cultivate student participation in sustainable research and development.



ACEP interns Elliot Mitchell-Colgan (left) and Kelsey Boyer working at the Nenana River test site. Photo by Marc Mueller-Stoffels/ACEP.

# Achievements

## Individual

The estate of Paul W. Caton '60 distributed a gift of \$14,908 to the Geophysical Institute Associates Endowment.

Joe and Carolyn Floyd donated \$20,202 to their named scholarship, providing tuition support for UAF students.

Ronald K. Inouye, long-time UAF supporter and volunteer, made a \$13,000 gift to the UA Museum of the North.

James E. Moody, P.E. '55 donated \$25,000 to the L.E. and Alaska S. Linck Steel Bridge Support Fund. The fund was established by Moody in memory of his parents.

Joseph E. Usibelli '59 and Peggy Shumaker donated \$25,000 to the Alaska Literary Series at the UA Press. In 2011, they established the fund with a \$20,000 gift to support the production of fiction, non-fiction and poetry works in the series.

## Corporate/Foundation

Alaska Aerospace Corporation made a gift of \$20,000 in support of the Alaska Space Grant Program.

Alaska Credit Union League donated \$16,750 to the 2012 Alaska Business Week program.

American Chemical Society made a \$12,000 gift to the ACS - Hach Scientific Foundation Scholarships.

Crowley Petroleum Distribution donated \$10,000 to the Crowley Scholarship for qualified UAF and School of Fisheries and Ocean Sciences students.

Kinross Fort Knox made a \$15,000 gift for radiation sensor equipment at the College of Engineering and Mines. This gift is in addition to their three-year commitment of \$990,000 toward their Mining Engineering Research Endowment at CEM.

Northrim Bank donated \$35,000 to the School of Management as well as \$25,000 for the Conference of Young Alaskans program.

The Pollock Conservation Cooperative recently continued their support of the Pollock Conservation Cooperative Research Center at the School of Fisheries and Ocean Sciences. American Seafoods Company, Glacier Fish Company, Starbound LLC and Trident Seafoods each made an \$84,000 gift, and Arctic Storm made a \$14,000 gift.

Rasmuson Foundation made a donation of \$100,000 to the UA Museum of the North for modular shelving and art racks.

Southern Southeast Regional Aquaculture Association made a \$10,000 gift in support of Alaska salmon research at the School of Fisheries and Ocean Sciences.

The William G. Stroecker Trust made a distribution of \$26,213 in support of the Bill Stroecker Jazz Endowment. The late Bill Stroecker '42 was a generous and longtime supporter of many programs at UAF.

Teck Limited made a \$10,101 gift to the Teck Scholarship to support engineering and geoscience students. The payment is part of their current three-year pledge, and is Teck's second three-year commitment to the scholarship fund.

The Seattle Foundation facilitated a gift of \$16,403 from the estate of John Robert and Mary Claus.

## In-Kind Support

Research efforts with unmanned aircraft in the Aleutians received support from AeroVironment UAS with an in-kind gift valued at \$52,500, and Aeryon Labs, Inc., who donated in-kind support worth \$53,250.

Marsh Creek LLC made an in-kind donation valued at \$67,357 in support of the Wind-Diesel Simulator project at the Alaska Center for Energy and Power.

## Legacy Society

The UAF Legacy Society recognizes donors who have made provisions to include UAF in their estate plans. There are currently 94 members. The most recent additions include Helga and Bill Watterson.

## Of note

Scholarships change lives. UAF is grateful for the support from our alumni and friends, and no one can say it better than our students who benefit from your generosity. Recent Ronald F. Cosgrave Scholarship recipient Ealum Howe said, "Receiving support through this scholarship has truly helped improve not only my academic success, but my day-to-day life as well. UAF is an amazing venue to receive a high-level, quality education that will only help me achieve and reach my goals in life."

**In Memory.** Over the past few months, Alaska and UAF lost several dear friends and long-time supporters. Our condolences go out to their families and loved ones. They will be missed. They include Ed Christiansen, Jacqueline Goering, Mary Louise Rasmuson, Robert Rausch '87 ScD (Hon), Helen Snedden, Jack Townshend '95 ScD (Hon) and Joe Tremarello '58, '68.

Bering Straits Native Corporation made a gift of \$50,000 to support the UAF Northwest Campus Driver Education program for commercial driver license training in Nome.

Shell Exploration and Production Company made a \$50,000 gift for research at the Alaska Center for Energy and Power. Shell also donated \$25,000 in support of the new GeoFORCE Alaska program that helps prepare high school students for future science study and careers.

Long-time UAF supporter, Dr. Cary S. Keller of Sportsmedicine Fairbanks, gave a major boost to the new terrain park being developed on the UAF campus with a donation of \$50,000. This new ski and snowboard park will increase the outdoor recreation opportunities available for students and help play a vital role in student recruitment.

Usibelli Coal Mine made an \$86,000 gift to the Usibelli Coal Mine Diesel/Heavy Equipment Certificate Scholarship. This endowment supports students in the certificate program at UAF Community and Technical College.

The third annual fall phonathon is in full swing! UAF students are reaching out to alumni and friends in an effort to build lasting relationships and raise philanthropic support for UAF's mission. Last year, student callers raised \$55,000 for UAF. The phone program runs from Oct. 28th through Dec. 6th.

Save the date! Chancellor Brian Rogers and Sherry Modrow will host their fourth annual gala celebration Feb. 2, 2013. Proceeds from the event will support the Fairbanks Memorial Hospital Circle of Hope Breast Cancer Project and the UAF Community and Technical College Dental Programs.

This list reflects gifts of \$10,000 and above made to the University of Alaska Fairbanks between May 11, 2012, and October 15, 2012.

The University of Alaska Fairbanks is accredited by the Northwest Commission on Colleges and Universities. UAF is an affirmative action/equal opportunity employer and educational institution. 11/2012 UAF photos by Todd Paris, unless otherwise noted.

**University of Alaska Fairbanks**  
**Chancellor Brian Rogers**  
[uaf.chancellor@alaska.edu](mailto:uaf.chancellor@alaska.edu)  
[www.uaf.edu/chancellor/](http://www.uaf.edu/chancellor/)

# Chancellor's Report on Philanthropy



Spring 2013

## Fairbanks foundations contribute to UAF's mission

During his lifetime, Bill Stroecker '42, was extremely generous to UAF. He demonstrated his support by contributing more than \$250,000 to a journalism scholarship, his named jazz endowment and the UA Museum of the North, as well as other programs. The university and Alaska lost a dear friend in 2010 when he passed away at 90. Bill's passion for the university continued in his estate plans, and the Bill Stroecker Foundation carries on his philanthropic legacy. In December, the foundation gave over \$32,000 to establish the Bill Stroecker Scholarship Fund at the School of Management.

Bill's late sister, Marion Weeks, was also a long-time supporter, and the Marion G. Weeks Charitable Foundation recently contributed \$15,000 to Bill's scholarship fund as well as \$12,500 to KUAC and \$5,000 to the Helen Van Campen Journalism Scholarship. Together their legacy continues to help sustain the university's mission.



Photo by Monique Musick

## Local supporter advocates for UAF

Linda Hulbert, a local New York Life representative, is committed to education. A former educator, she has a long personal connection to UAF. Her late husband, John, taught at UAF, her son Erik was a student here, and her daughter and son-in-law are alumni. A passionate advocate, she established a memorial scholarship honoring John to support single-parent students attending UAF's Community and Technical College. The Hulbert family recently made a generous six-year commitment totaling \$180,000 for UAF's new outdoor terrain park. The park is unique for a university, and will offer an exciting array of outdoor activities for students.

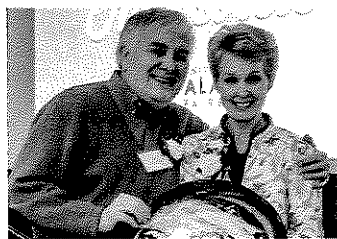
Linda is committed to giving back on both a personal and corporate level, and has been instrumental in building a philanthropic partnership between New York Life and UAF. NYL gave an enormous boost to two successful college preparation programs at UAF, making multi-year commitments to the Alaska Summer Research Academy and the Rural Alaska Honors Institute. NYL recently donated more than \$238,000 to the programs, as part of a three year commitment of \$900,000 to the UA system. NYL's funding to UA has exceeded \$1.7 million since the company's first gift in 2007. UAF is grateful for Linda's and NYL's generosity.



Photo courtesy of NYL

## Celebrating philanthropic giving

Two annual events help to acknowledge and support philanthropy at UAF. The annual *Celebration of Giving*



Helga and Bill Watterson at the 2012 donor celebration. Photo by Todd Paris.

celebrates and honors UAF donor who are vital to the university's continued success. The Nov. 1, 2012, event recognized individual donors, Dr. and Mrs. Jeffery Zuckerman; corporate donors, Sumitomo

Metal Mining Pogo and Kinross Fort Knox; annual giving donors, Helga and Bill Watterson '64; and BP, for donation of a state-of-the art working wellhead for the classroom in the UAF Community and Technical College process technology program. Last year more than 3,800 donors gave over \$13 million to UAF.

The *Chancellor's Gala* brings together supporters who jointly contribute to UAF and a community program.

The Feb. 2, 2013, event hosted more than 300 people and nearly \$85,000 was generated that evening. Guests enjoyed live music, auction activities and great company. Proceeds will help support UAF Community and Technical College dental programs and the Greater Fairbanks Community Hospital Foundation Circle of Hope Breast Cancer Project.



## Achievements

### Individual

An anonymous gift of \$20,200 was made in support of graduate students in Northern Gulf of Alaska applied research at the School of Fisheries and Ocean Sciences. Anonymous gifts totaling \$17,500 were given to support the Nanook Club Cheer Team.

Marilyn Engle donated \$13,100 and endowed the Kevin Engle Memorial Scholarship.

John J. Goering continued his support of the Goering Family Fellowship with a gift of \$29,000, providing support for graduate students in the School of Fisheries and Ocean Sciences, the College of Engineering and Mines, and the School of Management.

Raye Ann and E. Thomas Robinson gave \$11,800 to their named scholarship and \$11,200 to support student athletes.

Brian Rogers and Sherry Modrow, '72, '85, donated \$27,000 to the Chancellor's College Completion Scholarship, which supports upper-level students demonstrating financial need.

Helga and Bill Watterson '64, made a \$15,000 annual gift to support the area of greatest need at UAF. The Watterson's are also members of UAF's Legacy Society.

### Corporate/Foundation

Bering Sea Fisheries Research Foundation donated \$10,000 for Alaska crab research at the School of Fisheries and Ocean Sciences.

BP made a \$12,000 gift to the School of Management to support the 2013 Arctic Innovation Competition.

The Charles Koch Foundation donated \$15,000 to the Charles G. Koch Charitable Foundation Fund supporting the School of Management.

The estate of Mary Louise Rasmuson made two \$50,000 distributions - one will support the Rasmuson Library and the other created the new Elmer and Mary Louise Rasmuson Fisheries support fund at the School of Fisheries and Ocean Sciences.

Flint Hills Resources Alaska renewed their \$25,000 support to the UA Museum of the North school tour program.

Icicle Seafoods made two \$25,000 gifts, to Alaska Business Week and for Alaska Region National Ocean Science Bowl scholarships. They also donated \$15,000 to the Icicle Seafoods Bristol Bay Student Scholarship fund.

The Jessie O'Bryan McIntosh Trust donated \$18,779 to its named scholarship.

The Liz Claiborne and Art Ortenberg Foundation donated \$37,500 for the George Schaller Fellowship in the Resilience and Adaptation graduate program.

Northrop Grumman made a \$20,000 gift to support STEM outreach programs at UAF.

The Pollock Conservation Cooperative (PCC) made gifts to the Pollock Conservation Cooperative Research Center at the School of Fisheries and Ocean Sciences. The PCC member companies, American Seafoods Company, Arctic Storm, Glacier Fish Company, Starbound LLC and Trident Seafoods, made gifts totaling \$350,000.

The Rasmuson Foundation donated \$75,000 to establish the Mary Louise Rasmuson Undergraduate Fisheries Endowment at the School of Fisheries and Ocean Sciences.

Santa Monica Seafood donated \$10,000 for Alaska crab research at the school of Fisheries and Ocean Sciences.

Seisa Group made a \$22,289 gift to the Seisa Science fund at the International Arctic Research Center.

Sumitomo Metal Mining Pogo completed their \$1,059,000 pledge with a final gift of \$353,000 to the Mining Engineering Research Endowment at the College of Engineering and Mines.

Teck Resources Alaska donated \$50,000 to the Teck Alaska Scholarship.

The Glosten Associates made their second \$20,000 payment toward their original \$60,000 pledge for an educational exhibit about the research vessel *Sikuliaq* planned for the UA Museum of the North.

### Legacy Society

The UAF Legacy Society recognizes donors who have made provisions to include UAF in their estate plans. There are currently 96 members. Recent additions include Dirk V. Derksen and Margaret R. Peterson.

## Of note

In Memoriam. Board of Trustees member Ted Fathauer, former National Weather Service forecaster and recent UAF MS graduate, passed away in January. Alaska and UAF lost a friend, volunteer and long-time supporter. We also send heart-felt condolences to the families and loved ones of lifelong Alaskan and retired professor Earl Beistline '39, '47, '69 LLD (Hon); artist, Enid Cutler; former Board of Trustees member Peter Schust '58; and emeriti director of the Cooperative Extension Service, James Matthews.

First National Bank Alaska made two \$10,000 gifts, for financial aid to students at the UAF Community and Technical College, and to help establish a new student investment fund at the School of Management. They also made a \$12,000 gift for student scholarships at the Kuskokwim campus. FNBA was a lead sponsor of the 2013 Chancellor's Gala.

For the fifth year, Alaskans can support UAF and help make a difference by making a gift through the Alaska Permanent Fund dividend charitable contribution program, Pick-Click-Give. In addition, ExxonMobil will again match gifts made to UAF (and other Alaska educational institutions) dollar-for-dollar up to a total of \$100,000.



Wells Fargo recently made a \$50,000 gift to support the 2013 Rural Alaska Honors Institute. They also renewed their \$25,000 gift to the UA Museum of the North for military appreciation events.

Long-time UAF supporters John and Fran Zarling of Zarling Aero and Engineering made gifts in November and December totaling \$14,000, and reached their \$100,000 goal to the Zarling Family Hockey Scholarship.

Nanooks are calling you! The second annual spring phonathon runs from Feb. 24 - April 11. UAF students are calling alumni and friends in an effort to build lasting relationships and raise philanthropic support for UAF's mission. Last spring, callers raised more than \$17,000 for UAF. The phone program's efforts have helped raise nearly \$145,000.

Save the date! The 16th annual Scholarship & Award Breakfast takes place Tuesday, April 16. Donors can get together with students and see the impact of their scholarship gifts. Annually, over 400 privately funded scholarships provide more than a million dollars to students in the form of scholarships and awards.

This list reflects gifts of \$10,000 and above made to the University of Alaska Fairbanks between Oct. 16, 2012 and Jan. 25, 2013.

The University of Alaska Fairbanks is accredited by the Northwest Commission on Colleges and Universities. UAF is an affirmative action/equal opportunity employer and educational institution. 02/2013 UAF photos by JR Ancheta, unless otherwise noted.

**University of Alaska Fairbanks**  
Chancellor Brian Rogers  
[uaf.chancellor@alaska.edu](mailto:uaf.chancellor@alaska.edu)  
[www.uaf.edu/chancellor/](http://www.uaf.edu/chancellor/)



# CHANCELLOR'S REPORT *on Philanthropy*



Summer 2013

## FedEx donation boosts aviation program at UAF CTC



The FedEx jet parked by the CTC hanger at the airport.

The donation of a retired Federal Express 727 dubbed "Joy" gives the UAF Community and Technical College aviation program a big lift. The plane, which arrived Feb. 28, will help students get hands-on training on equipment they will likely encounter in their careers. The jet is housed at CTC's new hanger at the Fairbanks airport East Ramp.

This was one of two jets donated by FedEx to the university, the other to the aviation program in Anchorage. "The donations are an example of the many ways FedEx supports education and training in

the communities FedEx employees live and work," said David Sutton, Managing Director of Aircraft Acquisitions and Sales for FedEx Express. At the May 1 ribbon-cutting for the 20,000-square-foot hangar, CTC Dean Michele Stalder said, "It's a chance to open the doors to the community so they can experience what UAF CTC is doing for the future of Alaska's aviation industry."



Nook helps to greet the jet at the Fairbanks airport.

## Corporate support makes impact



Flint Hills Resources Alaska continued their longstanding partnership with UAF and recently

made a generous gift of \$110,000 that will support a variety of programs. The School of Management, the Alaska Summer Research Academy and the Athletic Department will each receive \$20,000, and the CTC Process Technology Program and the College of Engineering and Mines will receive \$25,000 each. This new gift is above and beyond their \$25,000 donation in support of the UA Museum of the North school tour program, which offers school-age students a learning environment with hands-on experiences and gallery exploration. During the 2011-2012 school year, the docent-guided program offered free admission to nearly 1,800 students, thanks to the generosity of Flint Hills Resources.

## Usibelli tradition of giving

The Emil Usibelli award recipients were honored at a reception May 6 at the UA museum. For the 22nd year, the three \$10,000 awards were funded by a generous \$600,000 endowment established by the Usibelli Coal Mine.

Joe Usibelli, Jr. spoke about his and his father's commitment to giving back to their alma-mater, and their philanthropic partnership with UAF supports students, faculty, capital projects and much more.



From left, Chancellor Brian Rogers, Joe Usibelli, Jr., award winners Jonathan Rosenberg, Teaching; Catherine Cahill, Service; Jeffrey Freymueller, Research; and Provost Susan Henrichs. UAF photo by JR Ancheta.

## Scholarships inspire students and donors alike



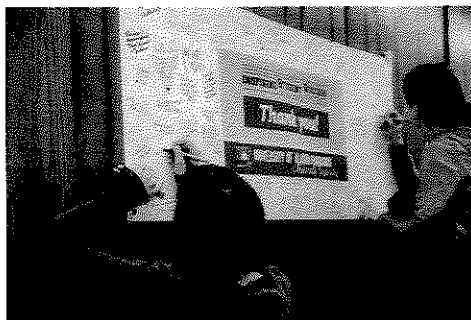
Nina Tartakoff speaks at the scholarship breakfast.

Over 200 dedicated donors, students, faculty and friends met early on Tuesday morning, April 16 to celebrate the annual "Inspiring Student Success" Scholarship and Award Breakfast. Scholarship recipients Ralph Sinnok and Hannah Foss spoke about how scholarships inspired them and made a positive impact toward reaching their educational goals. Donor Nina Tartakoff spoke about her cousin Nathan Gerson, whose generous scholarship established through his legacy gift helps students in financial need. This year, 495 UAF students received nearly \$1.2 million in private scholarships and awards.



Student Jaenelle Manchester catches up with Erik Hansen at the 2013 breakfast.

## Students say thank-you to donors



On Feb. 14, students gathered to write thank-you notes to their scholarship donors. They also wrote messages of thanks on a large banner that was later displayed at the 2013 Scholarship and Award Breakfast. Osher Reentry Scholarship recipient Maria Morrison wrote, "Thank you so much for your support! It is because of your generosity that my dreams are finally able to come

true!" More than 100 students came throughout the day to write personal messages of thanks. This is the second year for this gathering and stewardship outreach.

## Achievements

### Individual

The estate of Edward Christiansen made a distribution of \$45,230 to the Edward K. and Alene Christiansen Music Scholarship.

Linda Hulbert made a pledge payment of \$30,000 toward the Hulbert family's six-year commitment to the UAF Terrain Park.

Long-time supporter Ann Tremarello, '57, donated \$20,000 to the Joseph Sr. and Rose R. Tremarello Memorial Scholarship, supporting qualified students on the UAF women's and men's varsity basketball teams. Marco Tremarello donated \$10,000 to the family scholarship fund.

### Corporate/Foundation

Alyeska Pipeline Service Company made a gift of \$20,000 to the Alyeska Pipeline Native MBA Fellowship.

Associated General Contractors of Alaska donated \$10,000 to the UAF ASCE Steel Bridge Competition Support Fund.

Central Bering Sea Fishermen's Association made a \$10,000 gift to the School of Fisheries and Ocean Sciences for Alaska crab research.

Crowley Petroleum Distribution donated \$10,000 to the Crowley Scholarship.

The Greater Fairbanks Community Hospital Foundation made a gift of \$11,765 to the Department of Recreation, Adventure and Wellness for a Patty Ice Arena scoreboard.

NANA Development Corporation made a \$10,000 gift to the Alaska Business Week program for 9th - 12th grade students.

Northrim Bank made an unrestricted gift of \$50,000 to the School of Management.

Rasmuson Foundation donated \$20,000 to the UA Press. They also made a \$25,000 gift to the Bristol Bay Campus for the Science Center in Dillingham.

Schlumberger Oilfield Services donated \$25,000 to the GeoFORCE Alaska program.

Solsten XP donated \$15,000 to the GeoFORCE Alaska program.

Tesoro Petroleum Companies made a \$25,000 gift to the Alaska Business Week program.

Totem Ocean Trailer Express made a \$40,000 pledge payment in support of UA Museum of the North events.

### Legacy Society

The UAF Legacy Society recognizes donors who have made provisions to include UAF in their estate plans. UAF celebrates the 102 current members of the Legacy Society.

The UA Foundation held a free annual estate-planning seminar May 16 titled **Financial and Estate Planning After the Fiscal Cliff**. The seminar provided updates on financial planning and recent legislated tax changes.

## Of note

the spring phonathon ended April 11 and raised more than \$25,000 from 235 pledges, surpassing its fundraising goal of \$17,000. Over six weeks, seven student callers made more than 11,500 phone calls.



UAF photo by JR Ancheta.

The 4th annual Employee Giving Initiative took place through May 9. This fiscal year, support from more than 500 UAF staff and faculty raised over \$245,000.

**Supporting UAF!** More than 4,100 donors have made over \$4.8 million in philanthropic gifts to UAF to date this fiscal year — a 13 percent increase from last year. Students like Matthew Balazs, recipient of the Jessie O'Bryan McIntosh Scholarship, say it best: "Thank you to all of those who give and work so hard to help students."

John and Fran Zarling made a \$26,000 gift that supports several areas including the College of Engineering and Mines, Athletics and the Zarling Family Hockey Scholarship. John was honored at the 2013 Commencement with a Meritorious Service Award.

**In Memory.** Alaska and UAF have recently lost several friends and supporters. Our condolences go out to their families and loved ones — they will be missed. They include professor emeritus and supporter John Goering, former UAF Fire Department chief Bill Shechter, and long-time donors Peggy Huber and Virginia Sparling '45.

**Staff news.** UAF Development Director Emily Drygas received the 2013 Fairbanks North Star Borough ECDC Family Friendly Workplace Award. Recipients are nominated by their employees and recognized for leadership practices that benefit employees and the community. Annual Giving Director Megan Damario accepted the Lead Development Officer position, and Ross Imbler was promoted to Director of Annual Giving.

**Save the date for these upcoming events:**

- The Margaret Murie Building dedication takes place on Aug. 22, 2013, from 2 - 5 p.m.
- The 2013 Convocation will take place on Sept. 19, 2013, from 1 - 3 p.m.
- The 2013 Celebration of Giving will be held on Nov. 14, 2013.

This list reflects gifts of \$10,000 and above made to the University of Alaska Fairbanks between Jan. 26, 2013 and May 12, 2013.

The University of Alaska Fairbanks is accredited by the Northwest Commission on Colleges and Universities. UAF is an affirmative action/equal opportunity employer and educational institution. 05/2013

UAF photos by Todd Paris unless otherwise noted.



University of Alaska Fairbanks  
Chancellor Brian Rogers  
uaf.chancellor@alaska.edu  
www.uaf.edu/chancellor/

## UAF Development Office Guidelines for a Productive, Efficient and Respectful Office Environment

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- As a support organization, our responsibility is to be a resource for UAF students, faculty, staff, alumni and donors. Therefore, our goal is to **find solutions to problems** within university, state and federal regulations.
- **All positions are equally important** to the efficient operation of our office. Although Development staff perform different tasks and work at different levels, every job we do is necessary to support the activities of the office and UAF as a whole.
- We deal with issues. When dealing with a problem created by another person, you should **focus on the issue, not the person**. There are no bad people, only bad behaviors or actions. Solve problems by focusing on the issues.
- You deserve to be **treated with respect**. You do not have to tolerate disrespect from students, faculty, staff, alumni or donors. If someone is rude on the phone, simply end the conversation.
- **Collaboration and cooperation** are important in getting things done effectively. We are all in this together and if we work as a team we will work more effectively and enjoy the time spent undertaking the work.
- **Respectful behavior** is the only kind of tolerable behavior. You don't have to agree with what another says or does, but you must **respectfully disagree**.
- All **communications will be courteous**. This includes phone calls, letters, emails, memos and conversations. This rule is nonnegotiable.
- **Listen**. The average employee is about 25 percent effective as a listener. Although most of us don't intentionally ignore what's being said, the end result is a perception that what is being said is not important.
- **Office visitors should be acknowledged quickly and courteously**. The first person the visitor meets should greet the visitor and determine where they should be directed.

- The **office area should be kept as neat as possible** and free of boxes, surplus materials, etc.
- All **internal/external communication** (written documents outside of e-mail) distributed from this office should be approved by the director and edited by the annual giving director prior to distribution. (Examples: job advertisements, CRP, etc.)
- Because of the arrangement of our office, everyone needs to be cognizant of the need for an atmosphere conducive to a productive work environment. **Everyone should act in a manner that does not disturb others.**
- Work areas should be **organized in a neat**, professional manner.
- Staff is expected to dress in a manner to present a neat and clean image as would be expected in any **professional office**. Casual Fridays are welcomed — which includes dark denim blue jeans and a UAF shirt (optional). Unless approved by your supervisor, all other days will be business or business casual.
- Staff is expected to discuss **annual leave requests** with their direct supervisor, allowing for as much lead time as possible. Staff is also expected to contact their direct supervisor when **sick leave** will be utilized.
- **Staff birthdays** will be celebrated with cards circulated throughout the office. Bi-annual (summer/winter) **all-staff celebrations** will be held at an offsite location that is chosen by vote.
- Staff is expected to be **familiar with our purpose, vision, core values and guiding principles**, and to conduct themselves in accordance with each.



## UAF Peer Institutions

### Standard Academic Peers

(*from  
since LA*)

Idaho State University  
 ✱ Montana State University-Bozeman  
 New Mexico State University-Main Campus  
 North Dakota State University-Main Campus  
 Oregon State University  
 The University of Montana

University of Idaho  
 University of Maine  
 University of Nevada-Reno  
 University of Wyoming  
 Utah State University

### UAF Campus Peers

#### UAF Rural Campuses

Bay Mills Community College MI  
 Blackfeet Community College MT  
 Blackfeet Community College MT  
 Cankdeska Cikana Community College ND  
 Chief Dull Knife College MT  
 Clarendon College TX  
 College of Menominee Nation WI  
 College of Menominee Nation WI  
 Columbia Gorge Community College OR  
 Crownpoint Institute of Technology NM  
 DIN-E College AZ  
 Eastern New Mexico University-Ruidoso NM  
 Eastern Wyoming College WY  
 Fond Du Lac Tribal and Community College MN  
 Fort Belknap College MT  
 Fort Berthold Community College ND  
 Fort Peck Community College MT  
 Gogebic Community College MI  
 Independence Community College KS  
 Itasca Community College MN  
 Kennebec Valley Community College ME  
 Kent State University-Geauga Campus OH  
 Lac Courte Oreilles Ojibwa Community College WI  
 Lamar Community College CO  
 Leech Lake Tribal College MN  
 Linn State Technical College MO

Little Big Horn College MT  
 Little Priest Tribal College NE  
 Mesabi Range Community & Technical College MN  
 Minot State University-Bottineau Campus ND  
 Nebraska Indian Community College NE  
 New Mexico State University-Grants NM  
 North Central Missouri College MO  
 York County Community College ME  
 Northland Pioneer College AZ  
 Northwest Community College WY  
 Northwest Iowa Community College IA  
 Northwestern Connecticut Community College CT  
 Pine Technical College MN  
 Saginaw Chippewa Tribal College MI  
 San Juan College NM  
 Sisseton-Wahpeton Community College SD  
 Sitting Bull College ND  
 Southwestern Community College IA  
 Stone Child College MT  
 University of Arkansas Community College Hope AR  
 University of New Mexico-Los Alamos Campus NM  
 Vermillion Community College MN  
 West Shore Community College MI  
 Western Wyoming Community College WY  
 York County Community College ME

#### UAF Community and Technical College

Alexandria Technical College MN  
 Bay De Noc Community College MI  
 Big Bend Community College WA  
 Blue Mountain Community College OR  
 Cascadia Community College WA  
 Central Lakes College-Brainerd MN  
 Central Maine Community College ME  
 Central Ohio Technical College OH  
 Clatsop Community College OR  
 Dine College AZ  
 Eastern Wyoming College WY

Gogebic Community College MI  
 Hibbing Community College MN  
 Kennebec Valley Community College ME  
 Lake Washington Technical College WA  
 Luna Community College NM  
 Mesabi Range Community & Technical College MN  
 Mid Plains Community College NE  
 Morgan Community College CO  
 North Central Missouri College MO  
 North Dakota State College of Science ND  
 Northwest Community College WY  
 Northwestern Connecticut Community College CT

Pierce College at Puyallup WA  
Sheridan College WY  
Snow College UT  
Southern Maine Community College ME  
Southwest Kansas Technical School KS  
Southwest Wisconsin Technical College WI

Southwestern Community College IA  
Trinidad State Junior College CO  
West Shore Community College MI  
Western Nebraska Community College NE  
Western Wyoming Community College WY

**Competitive Peers (in development)**

Colorado State University  
Humboldt State University  
Michigan Technological University  
Montana State University - Bozeman  
Oregon State University  
The University of Montana

University of Arizona  
University of Idaho  
University of Wyoming  
Washington State University  
Western Washington University

**Research Peers**

Kansas State University  
Montana State University-Bozeman  
New Mexico State University-Main Campus  
Oregon State University  
University of Delaware

University of Idaho  
University of Maine  
University of Nevada-Reno  
University of Wyoming  
Utah State University

**NCHEMS Peers**

Clemson University  
Montana State University  
New Mexico State University-Main Campus  
North Dakota State University-Main Campus  
University of Arkansas

University of Idaho  
University of Maine  
University of New Hampshire-Main Campus  
University of Wyoming  
Utah State University

**Internet Links to Data Sources**

*IPEDS NCES\* Executive Peer Tool*

<http://nces.ed.gov/ipeds/datacenter/Expt/SelectComparisonInstitution.aspx>

*IPEDS NCES*

<http://nces.ed.gov/ipeds/datacenter/>

*Carnegie Classification of Higher Education*

<http://classifications.carnegiefoundation.org/>

*National Science Foundation Higher Education Research & Development Survey*

<http://www.nsf.gov/statistics/srvyherd/>

*College Portrait of Undergraduate Education*

<http://www.collegeportraits.org/>

*USNews*

<http://www.usnews.com/education>

*CollegeBoard*

<http://www.collegeboard.org/>

*UAF PAIR Peer Data & Analysis website*

<http://www.uaf.edu/pair/datasets/peer-data-and-analysis/>

## Development & Alumni Relations Office - Program Review

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Updated: June 2014

### 1. Briefly describe your unit and its core functions.

**Description of Unit (Development)** - UAF's central Development office represents 12 positions (11 full-time employees and one .75% position). One position, a brand new Major Gift Officer position, is vacant (recruitment underway). The college and school fundraisers report directly to their Dean or director, and have a dotted-line report to UAF Development Director Emily Drygas. Those positions are funded 100% by the deans/directors. Central Development's mission is to build positive internal/external relationships and to solicit private funds from corporations, alumni and friends. In June of 2013, our central Development office went through a considerable audit of our organization. As a result, three primary divisions were developed: Major Gift Division, Annual Giving Division, and a Donor Relations Division. This revised approach has positioned our team more strategically and provides a more efficient and focused organization. Collectively, UAF's Development team is responsible for raising \$6-8M in philanthropic dollars annually. The primary service that the central Development office provides is raising private funds for scholarship, programs, equipment, capital and unrestricted needs. The secondary service we provide is a resource to UAF leadership and colleagues on strategies to raise private funds. This service is increasingly important as budgets decrease and more emphasis is placed on revenue sources such as private support. We also message the impact that philanthropy has on UAF's mission and showcase the impact that our donors have on UAF's mission. As of April 2014, we've surpassed our \$8M goal and have raised \$10.1M in private funds, which represents more than 4,000 donors year-to-date.

**Description of Unit (Alumni)** - Effective January 2014, the Alumni Office merged with UAF Development. Previously, the Executive Director reported directly to Vice Chancellor of University & Student Advancement, Mike Sfraga. The primary goal of this unit and the Alumni Association is to serve and support UAF graduates and to provide opportunities for Alumni to maintain lifelong and meaningful involvement with the University. A secondary role is to make connections with current students (prior to graduation) to build relationships and awareness. With an integrated Alumni Relations program, we are moving from an Association model that operated independent of the University and are moving in a direction to build a fully integrated organization that focuses on alumni relations and increased alignment with the Association and the University.

The Alumni office has two full-time employees (executive director and coordinator), as well as a student employee. Note that the Executive Director position is currently vacant and Emily Drygas is serving as the interim director. The Alumni Association supports 20% of the Alumni budget, with UAF supporting the remaining needs.

Attached is a current organizational chart that represents employees of the office of Development and Alumni Relations, with the exception of the 8 student callers who are employed for 14 weeks per year (see attachment 1 - Org Chart).

### **Engagement Opportunities - Centennial**

Alaska's flagship campus is approaching its centennial. After nearly 100 years, there is much to celebrate and reflect upon. Our academic programs range from the certificate level to PhDs. Undoubtedly, our mission of teaching, research and outreach is touching the lives of our students, our staff/faculty, Alaskans, and friends throughout the global community. The relationships we've built over the years have positively influenced and expanded our vision at

UAF. As we look ahead to the next 100 years at UAF, it's time to reengage with old friends and alumni to update them on our progress and our vision ahead. Relationship building is a core principal to the work of our development and alumni team. Every day, our team is engaging, interacting and communicating the needs of our mission with our friends, alumni, corporations and foundations. The proactive outreach efforts of our development & alumni team are that much more successful thanks to the good works of our collective, staff and faculty. Ongoing review of our progress to date, coupled with increased metrics and outreach in the future, will ensure that we continue to increase philanthropic dollars raised for UAF.

2. What is the FTE count within your unit? Include total of each FTE on restricted v. unrestricted funds, using the table below.

Unit Name: Development	# FTE (0.0)	Salary & Benefits (Labor) Budget (\$0,000.0)	Operating Budget (\$0,000.0)	Total Labor + Operating + Other Budgets
Restricted		\$	\$	\$
Fund 1	11.75	\$	\$	\$
Other		\$	\$	\$
Totals:		\$	\$	\$

Unit Name: Alumni	# FTE (0.0)	Salary & Benefits (Labor) Budget (\$0,000.0)	Operating Budget (\$0,000.0)	Total Labor + Operating + Other Budgets
Restricted		\$	\$	\$
Fund 1	2	\$	\$	\$
Other		\$	\$	\$
Totals:		\$	\$	\$

- a. Please attach an updated organizational chart, including FTE, job family classification and working title for each position

(See attachment 1 - Org Chart).

- b. Has your organizational structure changed over time? If so, explain changes in budget or FTE trends for the past 3-5 years.

**History of Central Development & Alumni** - Our central Development staffing has changed significantly in the past year. Traditionally, we have been a 6-person department. With UAF's 100 year celebration approaching, UAF has an opportunity to create more awareness of our mission, engage our 30,000 alumni and increase philanthropic support. In recognition of this opportunity, last year Chancellor Rogers allocated new funding to the central Development office. As a result, we have strategically aligned our resources with our needs and have used this opportunity prepare for relationship-building opportunities linked to our centennial celebration.

With the exception of the recent integration of Alumni Relations with Development, the Alumni staffing/organizational structure has been in place for the past 10 years. Strategic planning is underway to integrate Alumni Relations with existing Development strategies. The goal is to build a 21<sup>st</sup> century Alumni

Relations model that focuses on engagement opportunities for our 30,000 alumni, rather than limiting our focus to those alumni who are current dues' paying members (approximately 1,400).

3. How are your business operations and administrative staff organized? For example, do you have a business office/centralized processing center or are administrative staff distributed throughout your operations?

(Mike - this looks like it may be covered more from a USA-wide perspective, but let me know if you need individual department input for this category.)

4. What are the primary and secondary services your unit provides? Please list with short descriptions, if necessary.

Our **strategies and goals** are developed on the basis of UAF's mission and core values. On an annual basis, UAF Development Director works closely with Chancellor Rogers and Vice Chancellor Sfraga on the approval of a strategic plan that outlines the funding priorities for UAF as a whole, and outlines the strategic ways in which funds will be raised (see attachment 2 - FY14 Strategic Development Plan). The funding priorities reflect overarching needs for UAF, as well as donor-centric funding opportunities as determined by Deans, directors and key units. All priorities are focused on UAF's mission and core values. With the recent integration of Alumni Relations with central Development, Alumni Relations will be a key division within the office of Development & Alumni Relations. FY14 represents the first year that UAF Development has outlined a strategic plan that spans over 5 years (FY14 - FY18). Previously, an annual fundraising plan was developed; however, given the 100 year celebration, a long-range plan was necessary.

In addition to UAF's Development plan, Development Director Emily Drygas and Vice Chancellor Sfraga work closely with colleagues at the UA Foundation and other University colleagues to develop a system-wide plan that outlines overarching goals and metrics for the University's collective team. The FY15 plan is nearly finished and will be distributed on July 1, 2014. UAF's plan outlines specific strategies focused on multi-year funding priorities/initiatives and programs; however, key metrics are cross-referenced in both plans.

In FY14, the Development Office worked from the following key strategies (note planning for FY15 is currently underway):

1. Primary: Proactively work to raise \$8M (\$25% increase from last year) from corporations, foundations and individual donors and grow our donor base to 4,600 (5% increase over last year.)
2. Primary: Continue to implement key recommendations made by fundraising consultant with the goal of taking the Development Office to the next level in an effort to meet the emerging funding needs of our mission.
3. Primary: Design and implement new procedures that will better support development operations.
4. Primary: Further develop the donor relations division to serve both donors and the collective fundraising team.

5. Secondary: Continue to focus on building internal relationships within the university to create awareness of philanthropy and the impact that it can have at UAF.
6. Secondary: Encourage the development team to build community, statewide and national relationships to advance our knowledge base and create awareness of our mission.

Describe any revenue generated as a result of these services, if applicable.

Collectively, UAF's Development team is responsible for raising \$6-8M in philanthropic dollars annually.

To date, Thanks to the generous philanthropic support of more than 4,500 donors, gifts to UAF total more than \$12M, surpassing the \$8 million goal for fiscal year 2014.

5. How do your business and administrative practices reflect UAF's mission and core values?

- a. Consider the practices within your unit and those that your unit is involved in. How do your services support and enhance UAF's core themes: to educate, discover, prepare, connect and engage?

Our services (Development and Alumni) support the following core themes:

- **To Educate** - We regularly engage with our donors and summarize the impact their contribution has on our mission - and, we encourage them to consider ways to enhance their support by inviting them to contribute to additional areas of interest. We educate our Alumni about the progress we are making as an institution and we encourage them to engage via Alumni receptions, Baseball gatherings, Reunion weekend, etc.
- **Discover** - We discover funding needs from our colleagues and we then discover donor interests so we can ultimately match donor interests with funding needs (donor-centric opportunities). This form of discovery is done through face-to-face meetings, proposals, and email/phone communication.
- **Connect/Engage** - Development has annual benchmarks for those employees who proactively invite donors to contribute to UAF (e.g., Major Gift Officers, Annual Giving employees) and we measure their activity to ensure that they are continuously working to connect, engage and interface with donors. Benchmarks are designed to ensure that our fundraisers are proactively engaging with donors to thank them for their support, discover new partnership opportunities, and to solicit support. Our fundraisers need to capture the donor's imagination and this is done when the funding need is clearly articulated and when the donors feel connected to the University. Alumni play a powerful role in the success of our Development goals. If our alumni feel engaged and connected with our mission (regardless of how many years it has been since their graduation date), the fundraisers will naturally move into a conversation that advances that relationship since the alumni feel valued, appreciated and engaged.

- b. How does your unit support a commitment to high-quality service?

Team members of the office of Development and Alumni Relations are committed to a **high-quality service**. We have a set of core values (see page 2 of the FY14 Development Plan) that we abide by and we also have a set of expectations that we follow as representatives of the University (see attachment 3 - Office Expectations).

- c. Are there opportunities to make business processes more effective and efficient? If so, how?

See Process Improvement section below.

- d. How does your unit ensure compliance and accountability without imposing unnecessary burdens?

**Rules, Regulation, Compliance** - The Development office complies with the rules and regulations of the UA Board of Trustees and UA Board of Regents. Development Director Emily Drygas meets with the Executive Development Council and attends the UA Board of Trustee meetings on a regular basis to learn new updates that will impact our fundraising team and donors. As a result, appropriate communication is prepared for these audiences depending on the situation and/or potential impact. Additionally, as a member of the Association of Fundraising Professionals (AFP), UAF Development also follows the guidelines outlined in the donor bill of rights, which acknowledges the rights of donors and reflects the responsibilities development professionals have when working with donors.

The Alumni Association has a board of directors and association-related activities are overseen by the board of directors. Alumni Relations' activities are in the process of being integrated with Development strategies in the near future.

- e. How does your unit address risk?

**Addressing Risk** - Our Development office has addressed risk by purchasing a security lock and audio system that allows our front-line staff members to provide access to our office areas. This was implemented as a result of unwanted walk-ins by individuals passing by who were often intoxicated and who had inappropriate behavior. The result is a safe and secure working environment for our employees. Secondly, we developed a departmental emergency plan for our Development office and all managers and employees have a copy of this document. With the recent merge of Alumni with Development, subsequent plans need to be developed. Lastly, we comply with UA Foundation guidelines to ensure that all contributions (checks and cash) are stored in a secure safe at our central office and that they are promptly deposited as intended by donor(s).

6. Please describe your largest customer group(s). If these customers were to rate business services in your unit, what do you think they would say? Please choose your perceived customer service experience on the scale below (circle one).

Not Acceptable - Slightly Acceptable - Moderately Acceptable - Very Acceptable - Completely Acceptable

- a. If you have conducted a recent customer satisfaction survey, please share the results as an attachment.
- b. If you have conducted a survey or would like to see improvement with your level of perceived service selected above, please describe actions you are taking to create positive change.

**Self-Evaluation of Organization** - Development's largest customer group is our donors (4,000+). These "customers" represent corporations, foundations and alumni. Additionally, for both Development and Alumni, our alumni base is another large customer group (30,000). Students and faculty/colleagues would be an additional customer group that is critical to our fundraising and relationship-building success. My perceived customer service experience (re: donors) is "Very Acceptable." For Alumni, I expect it to be "moderately acceptable" given that we have been supporting an independent alumni association rather than seeking broad alumni engagement through a comprehensive alumni relations program.

We do not have a recent customer service survey on hand for Alumni or Development- but, will review this concept and consider implementing one. The feedback would be helpful as we move forward with centennial discussions and increased fund-raising goals. Feedback from Marketing's recent survey, in the interim, will be insightful.

**Ongoing Communication & Outreach** - For Development, we are continually making adjustments to improve our method of communication. For example, we regularly have in-depth conversations with our Foundation colleagues on Foundation fund reports that outline balances and giving summaries. Our role is to ensure that the needs of the donors are met and that we accurately share this information about their balances, contribution, etc. In addition, we inform colleagues that UAF follows national standards for fundraising (e.g., Council for Advancement and Support of Education) and that these standards are maintained to ensure there is consistency and transparency. We also prepare the Chancellor's Report on Philanthropy (3 issues per year) to celebrate the impact that philanthropy has on our mission.

For Alumni, positive change is underway as we build an integrated Alumni Relations model into our organizational chart and strategic efforts. The end-goal is to build a new Development/Alumni organization that is both strategic and operational - and, one that communicates our newly defined mission to internal and external audiences. Communication outreach (social media, newsletter, web site, etc.) needs to be audited and reviewed to better understand its distribution, outreach and impact.

7. How do you compare with other units (internal) or organizations (external) of relative size or scope (universities or other service providers)?

A comprehensive summary of peer organizations in similar size or scope is referenced below. This represents full time employees for Development and Alumni Relations. Some notable observations include the following:



- UAF is clearly understaffed in the area of major gift officers.
- Further research is needed with each University represented; however, at a glance, the reporting line structure for the majority of Universities represented appear to have a reporting line to central (regardless of the college/school they represent) which provides for more accountability and management.
- There's recognition that some organizations have a centralized fund-raising operation at either the University or Foundation level.
- UAF is also understaffed in the area of Alumni Relations' staff. UMT Foundation has a separate reporting line for Alumni. All others represented had an integrated model with Alumni residing in the same department as Development.

#### Peer Institution Comparison

	UAF	UAA	UAS	UA Foundation	Univ of Idaho	UMT Foundation	MSU Foundation
FY13 Contributions	\$5,704,733	\$10,572,489	\$626,532	\$793,345	\$27,626,903	\$17,480,000	\$10,805,904
FY14 YTD Contributions (as of 4/7/14)	\$10,168,883	\$5,027,812	\$294,254	\$1,470,835			

#### Central Development Staff/Functions

Director of Development/Chief Dev Officer	1	1	0.5	1	1	1	1
Donor Relations Director	1	1	0	0	1	0	0
Central Major Gift Officers	3	7	0	0	17	14	18
Annual Giving	2	3	0.5	0	4	2	0
Donor Relations Officer	1	1	0	1	1	0	0
Stewardship Specialist	0.75	0	0	0	1	0	0
Event Specialist	1	1	0	0	1	0	0
Gift Planning	0	0	0	1.5	4	1	1
Support Staff (Asst. to Dir. & Fiscal Prof)	2	2	2	0	0	0	0
<b>Subtotal</b>	<b>11.75</b>	<b>16</b>	<b>3</b>	<b>3.5</b>	<b>30</b>	<b>18</b>	<b>20</b>

#### Foundation/Admin Functions

President/Exec. Director	0	0	0	1	1	1	1
Advancement Services (Data, fund, gift)	0	0	0	10	6	14	12
Prospect Research and Mgmt.	0	0	0	3	4	3	2
Advancement Services (Data, fund, gift)	0	0	0	0	8	0	0
Accounting	0	0	0	7	2	5	3
Event Specialist	0	0	0	0	0	0	4
<b>Subtotal</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>21</b>	<b>21</b>	<b>23</b>	<b>22</b>

#### DO's at College & Schools

College/School Dev Officers*	3	0	0	0	0	0	0
<b>Subtotal</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Total Development Staff** 14.75 16 3 24.5 51 41 42

\*UAF Development Officer Numbers reflect total Development related FTE hours. There are 7 positions total, with various percentages of time dedicated to fundraising activities.

NOTE: UAA and University of Idaho Advancement units also include staff dedicated to Marketing and Communication. These positions are not reflected in the totals above.

Alumni Staff	UAF	UAA	UAS	UA Foundation	Univ of Idaho	UMT Foundation	MSU Foundation
Exec Director	1	1	0.5		1	1	1
Assoc Director	0	0	0		2	1	0
Asst Director	0	1	0.5		0	0	0
Data	0	0	0		0	2	0
Events Coordinator	0	1	0		2	2	0
Web/Media/Communications	0	1	0		1	2	0
Membership	1	0	0		0	1	1
Alumni Relations Officer	0	0	0		0	0	2
Work Study Program	0	0	0			2	0
Support Staff	0	0	0		2	1	0
<b>TOTAL</b>	<b>2</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>8</b>	<b>12</b>	<b>4</b>

Peer institutions have been selected based on previous institutional comparisons. They have been pulled from the *Standard Academic Peers* listed on the *UAF Peer Institutions* document referenced at the July 24, 2012 Chancellor's Executive Leadership Workshop (Attached).

## 8. Process Improvement:

- What processes or administrative workflows work particularly well in your unit?
- What processes would you want to improve, change or eliminate within your unit?

**Process Improvements** - The most significant process improvement this year was the audit of central development's organizational chart and the integration of Alumni Relations.

In addition, our team is continuously making process improvements to ensure that we are operating efficiently and that we have processes in place that allow for streamlined work. One example is the addition of a scholarship database (**Academic Works**). The software will be purchased before the end of this fiscal year, thanks to a grant received from the UA Foundation. Construction and testing will be conducted between July and November 2014 and the implementation will be in December of 2014. The end result will be a database that showcases UAF's privately funded scholarships, tells the story of the individual the scholarship honors, provides an opportunity for additional gifts to be made on the site, and manages scholarship application process. This will be an incredible management tool for our donors, financial aid colleagues, students, and development team members and is designed to be unveiled prior to 2015 celebrations. In summary, this new software will allow multiple users to access information in an integrated program that serves varying needs, while improving our level of service and outreach to donors and students.

This fiscal year, the major gift team at the central office has overhauled its donor portfolios so that there is portfolio alignment with the Chancellor's fund-raising initiatives and so that we are in compliance with the UA Foundation's prospect management system. Additionally, customized donor portfolios are in place for UAF leadership, to include Chancellor Rogers, VC Sfraga, Sherry Modrow and Development Director Emily Drygas. This thorough review has established standard criteria for portfolios and will ensure that our fund-raising team has the framework needed (a targeted portfolio) to be successful.

9. "Shared services" is the consolidation of business operations that are used by multiple parts of the same organization. The goal of a shared service model is to allow each business unit/department to focus its limited resources on activities that support the UAF mission and core values.

- a. Do you see opportunities to implement shared service models? If so, where and how?

**Efficiencies:** Regarding shared services, the office of Development and Alumni Relations is at capacity and would not be in a position to take on additional responsibilities. Our recent organizational audit (June 2013) provided a comprehensive review of each position, titles in the context of the increased fund-raising expectations ahead with our centennial celebration. The additional feedback provided by external consultant Kristin Prieur and Mary Gresch (June 2013) recommended Alumni Relations be integrated with Development. This integrated approach is designed to develop the alumni association to a level where it can engage a broad base of alumni, build loyalty, support the vision of the Chancellor and the University leadership and provide leadership for the centennial celebrations ahead. The end result will be an efficient and functional team that is strategically moving forward with a shared vision. As we move forward with expanded fundraising goals, additional funds will be necessary to accommodate for face-to-face visit with donors, centennial events/celebrations, and marketing materials that will be necessary to create awareness of our centennial initiatives and funding priorities.

- b. Are there processes in your unit that could be shared with other units, or pooled? What impacts would you expect, in terms of service and efficiencies?

The only possible thought for shared or pooled resources may be within the administrative/membership function of the Alumni Relations office. However, we are currently reviewing current alumni processes over the summer months with the help of a consultant and in communication with the Alumni Association. I do not feel that we are ready to make a recommendation in this area until we have a better handle on current Alumni structures and duties.

One last area of possible shared services is within our PPA/travel functions. However, prior to 2013/14 - these functions took place outside of our office (in a centralized structure). Last year - these duties and responsibilities were delegated directly to our office to manage. Returning the duties to a central division would not be an efficient use of resources with the volume of travel and contractual services that we currently manage as well as in light of our growing staff. Lastly, with the merging of Alumni with Development, the centralization of this function would be even more burdensome to the central executive officer and team.

#### 10. Impact of decreased funding:

- a. What services would be most impacted by a 10% reduction in personnel funding, and how would they be impacted?

A 10% reduction in personnel funding would result in a significant reduction in our revenue generating capabilities. Below we have detailed metrics and projections to accommodate increased fundraising during centennial celebrations. These fundraising projections are based on staff growth models and cannot be accomplished with a diminished staff.

- b. What services would be most impacted by a 10% reduction in non-personnel funding, and how would they be impacted?

A 10% reduction in non-personnel funding would result in a significant reduction in our revenue generating capabilities. A good portion of our non-personnel budget is dedicated to contractual services related to Annual Giving as well as travel for solicitation of Major Gifts. A reduction to our non-personnel budget would result in a reduction in dollars raised.

- c. Would you consider shared service models to ensure the same level of services continue in the event of a personnel reduction?

Not at this time when we are building a model to increase revenue to the university.

The following scenarios represent potential (and approximate) cost-saving measures at incremental budget reductions (3-12%). Since the office of Development and Alumni Relations is a revenue-generating department, the proposed cut-backs would significantly impact revenue-generating programs and ultimately set UAF back for many years given the negative impact that these reductions will have on donor and alumni relations.

**3% Reduction: Development (\$32,319); Alumni (\$4,929)**

- **Development** - Reduce professional development/trainings; Events; Major Gift Travel
- **Alumni** - Down-size Rendezvous Alumni Banquet to an alumni reception

**6% Reduction: Development: (\$64,638); Alumni (\$9,858)**

- **Development** - Eliminate the revenue-generating phone program within the Annual Giving program; Reduce professional development/trainings; Eliminate 2 core events - Donor Thank You & Scholarship Breakfast; Reduce Major Gift Travel.
- **Alumni** - Eliminate the student employee position.

**9% Reduction: Development (\$96,957); Alumni (\$14,787)**

- **Development** - Eliminate the annual giving coordinator position, a revenue-generating position that raises unrestricted support for UAF.
- **Alumni** - Eliminate the student employee position and reduce the coordinator position to .75 FTE.

**12% Reduction: Development (\$129,276); Alumni (\$19,716)**

- **Development** - Eliminate the annual giving coordinator position (a revenue-generating position that raises unrestricted support for UAF) and the phone program. Reduce annual event expenditures.
- **Alumni** - Eliminate the student employee position and reduce coordinator position to .75 FTE and reduce the scale of the Rendezvous event.

**11. Metric Performance:**

Identify any administrative metrics you are using that reflect your key service areas. Include actual or quantifiable performance data in addition to targets or performance goals for the last 3-5 years, if available. Note changes in trends based on performance/metric change. Examples: volume or number of items processed within a defined period of time, length of time it takes to complete each average transaction (days), accuracy rates, customer satisfaction, etc.

**Metrics:**

Below is a summary of UAF metrics and giving projections (FY14 - FY18). The summary outlines our annual fund-raising goals and the benchmarks we have for targeted areas. These metrics are consistent with industry-wide standards of measurement that ensure that proactive efforts are made by fundraising employees. (Please also reference page 13 of the FY14 plan.) Also note that projected monetary goals are projected based on a staff growth model and centennial celebration opportunities.

FY14 Goal	4 year projections
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	annual % projected increase for	FY14 Goal	FY15-FY18	FY15	FY16	FY17	FY18	TOTAL
<b>**Fundraising Goal - TOTAL</b>		<b>\$8,000,000</b>	<b>9-11%</b>	<b>\$9,000,000</b>	<b>\$10,000,000</b>	<b>\$11,000,000</b>	<b>\$12,000,000</b>	<b>\$50,000,000</b>
Initiative		2,700,000	-	\$3,575,000	\$3,575,000	\$3,575,000	\$3,575,000	\$17,000,000
Annual		5,300,000	-	\$5,425,000	\$6,425,000	\$7,425,000	\$8,425,000	\$33,000,000
**Individual giving: % of total \$ raised		26%	2%	28%	30%	32%	34%	
Number of Donors		4,600	8%	4,968	5,365	5,795	6,258	
**Alumni Participation - % increase		4.6%	0.50%	5.10%	5.60%	6.10%	6.60%	
<b>**Annual Giving</b>		<b>\$375,000</b>	<b>10-13%</b>	<b>\$425,000</b>	<b>\$475,000</b>	<b>\$550,000</b>	<b>\$600,000</b>	
**Donor Retention		40%	5%	45%	50%	55%	60%	
Number of Faculty/Staff Donors		610	5%	641	673	706	742	
<b>**Proposals</b>		<b>102</b>	<b>3-5%</b>	<b>106</b>	<b>110</b>	<b>113</b>	<b>118</b>	
**Individual		31	5%	33	34	36	38	
**Corporate and Foundation		71	3%	73	75	78	80	
Contact Reports		747	3%	769	792	816	841	
New Donors		1,247	8%	1347	1455	1571	1697	
Upgraded Donors		2,103	5%	2208	2319	2435	2556	
<b>**New Legacy Society Members</b>		<b>5</b>	<b>30%</b>	<b>7</b>	<b>8</b>	<b>11</b>	<b>14</b>	
<b>**Gifts over \$25K</b>		<b>80</b>	<b>3-5%</b>	<b>83</b>	<b>86</b>	<b>88</b>	<b>91</b>	
**Individual (% increase)		16	5%	17	18	19	19	
**Corporation and Foundation (% increase)		64	3%	66	68	70	72	

Projected monetary goals for FY15-18 are projected based on staff growth model and centennial celebration opportunities.

Proposal and Contact Report goals based on MGO expectations and Prospect Management and Tracking System guidelines.

Other metrics based on historical giving data (annual averages) from FY08 - FY13.

\*\* Indicates UA Foundation Coordinated Metrics.

	UAF Development Metrics (FY08 - FY13)					
	FY08	FY09	FY10	FY11	FY12	FY13
Dollars Raised (All)	\$7,397,865	\$6,427,903	\$7,021,441	\$21,602,935	\$19,241,933	\$10,190,631
Dollars Raised (philanthropic)	\$7,397,865	\$6,427,903	\$7,021,441	\$4,788,779	\$13,289,740	\$5,700,468
Number of Donors	3,203	3,225	3,428	3,645	3,835	4,392
Number of Faculty/Staff Donors	407	502	589	563	576	581
Proposals	37	44	44	49	60	67
Contact Reports	140	255	182	185	269	581
New Donors	857	796	956	952	900	1,188
Upgraded Donors	1429	1420	1,481	1,721	1,796	2,003
New Legacy Society Members	10	11	8	12	5	4
Gifts over \$25K (philanthropic)	45	32	30	40	62	50

\*Effective FY11, private grants are included