

**University of Montana Western Foundation
Strategic Direction and Goals 2016-2021
Updated September 2017**

Mission Statement

The University of Montana Western Foundation exists to inspire generosity and connect donors with their passions in order to promote access and excellence in higher education at the University of Montana Western.

Strategic Direction and Goals

Over the next five years, the University of Montana Western Foundation will:

PRIORITY ONE: Broaden and deepen alumni and constituent engagement with the University, developing more meaningful relationships.

1. Design a regional strategy to engage alumni around the country.
2. Create a communication plan that includes newsletters and an annual report.
3. Collaborate with the region, county and Dillon including the Beaverhead County High School to imagine the future for University of Montana Western.
4. Develop and monitor metrics for constituent engagement.

PRIORITY TWO: Expand philanthropic support to the University, for the University of Montana Western's students, faculty and institutional priorities.

1. Prioritize institutional needs, creating a variety of giving opportunities. Engage students and faculty willing to share university priorities with donors.
 - a. Complete Menu of Funding Interests and incorporate a compelling story with each.
2. Develop a comprehensive fundraising strategy that assures income from diverse sources of revenue including alumni, individuals, corporations, foundations and events.
 - a. Segment population for annual appeals and specific appeals.
 - b. Develop and monitor metrics for fundraising efforts and events.
 - c. Utilize the database for research, documenting donor relations and monitoring fundraising metrics.
 - d. Increase the donor base and gifts from donors with focused and individuals donor relations and stewardship.
 - e. Prepare for and launch a capital campaign to complete capital projects, purchase property in acquisition zones, and sustain the university. Obtain student input on priorities for education and student life and faculty/staff input on priorities for programs and departmental initiatives.
3. Increase the endowment to \$10 million within FY17.

PRIORITY THREE: Build a strong and adaptive organizational structure with clear expectations for staff, board and committees and a collaborative relationship with the university.

1. Clarify and communicate the foundation's organizational structure, policies and position descriptions.
2. Assure the foundation is adequately staffed and resourced. Provide competitive salaries and benefits.
3. Orient new members of the foundation board and provide relevant training opportunities.
4. Create a process for aligning donors with opportunities for UMW support.

PRIORITY ONE: Broaden and deepen alumni and constituent engagement with the University, developing more meaningful relationships

1. Develop engagement strategies to connect with alumni and friends of the university around the country
2. Consistently communicate with alumni, donors and other constituents
3. Collaborate with the region, county and Dillon including the Beaverhead County High School
4. Develop and monitor metrics for constituent engagement

Objectives for FY18	Target Date	Responsible Person(s) or Committee	Status
1. a. Create an alumni outreach and communication plan	10/01/2017	Foundation staff, board and alumni	Skeleton plan until we have the website and DOC hired.
1. b. Improve local and regional events to strategically engage constituents. (Annually set & update calendar as of Aug.1 of each year)	On-going	Foundation staff, alumni and other key university leaders (Website Calendar)	
2. a. Send newsletter and an annual report	On-going	Foundation and marketing staff	
2. b. Maximize opportunities to inform alumni and other constituents of Experience One outcomes & university stories.	On-going	Foundation and marketing staff, foundation board, university leaders	Work with Beth on outcome data. Rack Cards??
2. c. Include alumni profiles on the website (Create archive process to keep data.)	On-going	Foundation and marketing/PR staff,	Dependent on Website
3. a. Facilitate a meeting with the community to begin to Imagine the Future for the University of Montana Western	04/01/2018	University leadership, foundation staff and board, university staff/faculty	Roxanne to follow-up with Beth.

- **1. a. Vanessa is working on an alumni outreach and communication plan. This is dependent on the alumni website which is currently under development with an anticipated completion date of Nov. 1, 2017.**
- **1. b. Vanessa will share the events calendar with the Foundation Board.**

PRIORITY TWO: Expand philanthropic support to the University, for University of Montana Western’s students, faculty and institutional priorities.

1. Prioritize institutional needs, creating a variety of giving opportunities. Engage students and faculty willing to share university priorities with donors.
 - a. Complete Menu of Funding Interests and incorporate a compelling story for each.
2. Develop a comprehensive fundraising strategy that assures income from diverse sources of revenue including alumni, individuals, corporations, foundations, events and fees.
 - a. Develop and monitor metrics for fundraising efforts and events.
 - b. Utilize the database for research, documenting donor relations and monitoring fundraising metrics.
 - c. Increase the donor base and gifts from donors with focused and individuals donor relations and stewardship.
 - d. Prepare for and launch a capital campaign to complete capital projects, purchase property in acquisition zones, and sustain the university. Obtain student input on priorities for education and student life and faculty/staff input on priorities for programs and departmental initiatives.
3. Increase the endowment to \$10 million within FY18.

Objectives for FY18	Target Date	Responsible Person(s) or Committee	Status
1. Prioritize institutional needs	On-going	Staff and Development Committee	In-progress
2. Approve the fundraising/development plan	06/01/2018	Board of directors	In-progress
3. Create quarterly and bi-annual report for campus on fundraising successes.	02/01/2018 08/01/2018	Foundation staff	
4. Grow endowment to \$10 million within FY18.	7/01/2018	Staff, board and university leaders	complete

- **We completed item 2. B. which was to inform the endowment constituents of the management fee. This was completed in March 2017.**
- **We added item 3. to our strategic plan based on feedback on the annual report that was shared with the campus in August.**
- **We have been working on the finalization of the development plan and will share the results via email once it is complete.**
- **The endowment has reached \$10M in Sept. 2017.**

PRIORITY THREE: Build a strong and adaptive organizational structure with clear expectations for staff, board and committees and a collaborative relationship with the university.

1. Clarify and communicate the foundation’s organizational structure, policies and position descriptions. (Term structure by year not month/date.)
2. Assure the foundation is adequately staffed and resourced. Provide competitive salaries and benefits.
3. Orient new members of the foundation board and provide relevant training opportunities.
4. Create a process for aligning donors with opportunities for UMW support.

Objectives for FY18	Target Date	Responsible Person(s) or Committee	Status
1. a. Create committee charters	02/01/2018	Governance committee	In-progress
1. b. Approve committee charters	02/01/2018	Foundation board	In-progress
1. c. Develop and implement a process for the executive director evaluation	05/01/2018	Governance committee	Work with Governance Committee
2. a. Design orientation for new board members	05/01/2018	Governance committee	
2. b. Review board assessment from October 2016 to determine training needs for the board.	03/01/2018	Governance committee	Work with Deb & Judy to begin process.

- **We completed the objective to hire an Events/Alumni Coor. II.**