



**FITCHBURG STATE  
UNIVERSITY**  
Office of Alumni and Development

Institutional Advancement

Unit Strategic Plan

# Institutional Advancement Unit Strategic Plan

## Introduction

Fitchburg State University's Advancement office holds a critical role in supplementing traditional funding sources through private philanthropy. By targeted, diverse, and thoughtful fundraising, financial support is collected from a built-in constituency of grateful alumni, community businesses, corporate sponsors, government and private grants, and a myriad of other sources. At colleges and universities across the country, this type of support has grown tremendously in the past 10 years, shifting from pleasant footnotes on university balance sheets to critical line items.

Institutions now rely on their Advancement offices to subsidize rapid growth in a number of areas, including faculty positions, student aid packages, programs, buildings, renovations, and other capital projects. For context, consider that nearly 75 United States colleges and universities have initiated and closed campaigns totaling more than \$3 billion, and that the top ten fundraising institutions in the US each reported more than \$350 million in total support for fiscal year 2020. As receipts increase and drive expectations ever higher, Advancement offices must respond by adding staff and supplanting tired research procedures with new techniques that can expand their reach and raise standards for success without sacrificing efficiency.

## Overview

Fitchburg State University's Division of Institutional Advancement includes three distinct but complementary units:

- The **Alumni and Family Relations** unit focuses on alumni and family engagement, special events, communications, and brand identity;
- The **Annual Fund and Donor Engagement** unit focuses on the donor continuum of prospective donor research, identification, cultivation, solicitation, stewardship, gift acknowledgement, and donor database integrity;
- The **Corporate, Foundations and Government Grant Relations unit (The Grant Center)** focuses on identifying funding opportunities, aligning academic and program subject matter experts to develop proposals that impact strategic priorities;

Overseen by the Vice President for Institutional Advancement, the team of eight employees accomplishes critical work that supports every aspect of Fitchburg State's mission. By working together, creatively and collaboratively, these entities form a productive partnership that benefits both our institution and our key stakeholders.

The Division of Institutional Advancement concentrates its efforts on increasing private and public resources to the University through the Fitchburg State University Foundation and promoting the Fitchburg State brand of academic excellence through consistent communications, marketing, special events, private and public grant partnerships, and public relations. Further, the Division's ambitious fundraising goals cannot be achieved

## Institutional Advancement Unit Strategic Plan

without a strong alumni relations effort, and philanthropy gives our alumni, as well as friends of the University, a way to deepen their engagement and express their passion and vision for the mission and future of Fitchburg State.

Fitchburg State stands poised to achieve greatness on many fronts. Advancement holds unique opportunities for many reasons. First, private giving has reached a plateau in recent years. Second, as the economy recovers, history has shown that there will be a reversion to the mean that will open a window of increased giving. Finally, the act of strategic planning – creating a clear, concise, focused academic vision and using it as the basis for a case for giving – is a critical step in raising the bar for philanthropy at any non-profit, and is a prerequisite for any kind of organized fundraising campaign.

The Division has worked diligently to keep the University's constituency engaged, optimistic, and confident that the campus, as our motto states, "will persevere" through all challenges. Among our recent successes, the Division of Institutional Advancement:

- Completed the *Honoring our Past, Celebrating our Future* fundraising campaign in 2012 with a stated goal of \$10 million. Thanks to thousands of gifts from philanthropic foundations, corporations, alumni and friends, the Division raised \$12,154,000 and had a direct impact on the quality of teaching and learning at the University.
- Created and implemented the "Intent to Apply for External Funding" form, which requires faculty and staff pursuing external funding make the linkage to the University's 2015-2020 Strategic Plan and institutional priorities. This made a measurable impact, ultimately resulting in \$5,216,330 in external grant funding for programs including but not limited to: Whiting Foundation grants for faculty travel to research and develop new courses and curriculum, performance incentive fund (PIF) grants for Latino Male Success, Department of Higher Education grants for RN to BS in Nursing, federal TRIO grants including Expanding Horizons Programs (now TRIO), Upward Bound and Upward Bound Math and Science programs, Commonwealth Dual Enrollment Partnerships and Early College High School Academy. In addition, the Advancement Office secured \$2,787,896 in donations from individuals and distributed \$1,329,968 in scholarships.

As we implement the new Strategic Plan 2020-2025, we remain proud of our past successes and optimistic about the road ahead in aligning our fundraising to new emerging Strategic Plan priorities and initiatives, specifically focusing on financial aid, faculty support, facilities improvements, and program enrichment.

As benchmarked against our peers, Fitchburg State's Division of Institutional Advancement has had a mixed history of performance. A history of underperformance has been punctuated by periods of impressive accomplishment and innovation. Fitchburg State's challenge is to create a record of achievement that is decidedly upward sloping, sustainable, and inspiring to external audiences. In order to accomplish this we are focusing on four broad strategies that will not only increase and sustain private and public fundraising, but will also build a stronger University ecosystem, from academics and research to student life and beyond:

## Institutional Advancement Unit Strategic Plan

1. Build a sustainable culture of philanthropy – students must learn from the moment they make contact with Fitchburg State that this is a place where *giving back* is a core value, where success is built on the shoulders of those who came before, and where the relationship they forge with their *alma mater* will last a lifetime.
2. Grow the national profile of Fitchburg State and increase awareness and pride among stakeholders – Fitchburg State can no longer be the best-kept secret in Massachusetts or the nation. As the caliber of research and publications, faculty, students, and programs has grown, public perception has lagged reality. It is time to educate the public about Fitchburg State’s strengths and accomplishments and reintroduce our alumni – and even our faculty and staff – to the great institution that Fitchburg State has become.
3. Strengthen agility, flexibility, efficiency, and responsiveness in the Advancement organization to support Fitchburg State’s aspirations – instability and leadership turnover in the Advancement staff have created disruption and discontinuity in the unit’s operation. The resulting inefficiency must be assessed, addressed, and resolved. Fitchburg State’s Advancement team must focus on its core values of collaboration, integrity, and quality to maximize its value to the campus.
4. Diversity and inclusion are core to this work, and it is incumbent upon us to engage our increasingly diverse constituency groups – we will offer programming to meet the diverse needs and interests of our alumni and donors, ensure communications are inclusive of all audiences, and sustain an organizational culture that is socially just through ongoing education, practice, and accountability. It is critical that we foster culture that embraces and celebrates a focus on diversity, equity and inclusion. This includes but is not limited to enhancing the development of dynamic and diverse advancement/alumni related boards and committees.

This will not be easy, but it is the path forward if we are to be successful in generating external support to advance Fitchburg State.

Specifically, we will:

- Increase corporate, foundation, and government letters of inquiries and grant submissions
- Expand alumni engagement with the campus and our students through special events on campus and across the country
- Increase alumni giving to the annual fund through multi-channel campaigns (social media, direct mail, segmented affinity group appeals)
- Promote establishing provisions naming Fitchburg State in bequests and estate plans
- Improve philanthropic donor stewardship with targeted reports and student acknowledgement letters detailing the impacts of giving.
- Develop a robust corporate engagement program for student experiential learning internships, capstone independent research project opportunities, workforce development grants, sponsored research, curriculum development, events, and equipment upgrades

## Institutional Advancement Unit Strategic Plan

- Continue to identify increased challenges facing the University's students, including needs for financial aid, food, nutritional and housing insecurity, reductions in state funding, and changing generational learning experiences and seek funding mechanisms to minimize the pressures
- Reaching out to diverse members of our current student body, staff, and engaged alumni in an attempt to craft programs and events that will appeal to more diverse groups or underserved alumni. We will attempt to create a larger and more inclusive group of individuals who decide upon programming and event needs within a set budget

To achieve these goals and address fundraising challenges, we have outlined our first strategic plan to set us on a new path of philanthropic impact.

In the context of strategic planning, it must be understood that Advancement is a service unit and as such does not inform strategy per se. Rather, the strategic planning process provides an opportunity to examine Fitchburg State's Advancement functions and ensure that they are organized optimally to respond to priorities and goals that emerge around students, faculty, research, programs and facilities.

### **Mission:**

“To build and sustain positive relationships across multiple constituencies and to engage robust philanthropic support from many different sources in order to fully realize the academic mission, potential and promise of Fitchburg State University.”

Inherent within the mission of the Office of Institutional Advancement is a commitment by its personnel (8 FTE) to be responsive to the various constituencies served by Fitchburg State University. In particular, emphasis is placed on professional, courteous, and responsive behavior toward students, parents/guardians, alumni, trustees, friends, corporations, foundations, state and federal funding sources, and other organizations upon whom Fitchburg State University depends on for support.

### **Vision Statement:**

“To unlock doors of opportunity for Fitchburg State University students to access a transformational education by engaging alumni, parents/guardians, friends, corporations, foundations, and government sources highlighting grant opportunities and generating financial support for university priorities by identifying, cultivating, soliciting, and stewarding all potential funders and donors.”

The timing of this discussion could hardly be better. Economic recovery has historically preceded large growth in the philanthropic sector. Giving to education comprises 13% of philanthropic activity in the United States and reached a grand total of \$49.5 billion in 2020. Estimated giving to education per American household has grown from \$202 in 2015 to \$351 in 2020. Education is second only to religion as a destination for philanthropic dollars.

## Institutional Advancement Unit Strategic Plan

Although some argue that the era of mega-gifts (generally considered those over \$100 million) is on the wane, many of the largest gifts will still make their way to education. Within that sector, five of the seven gifts to education in 2020/21 of at least \$100 million were directed to medical research and education, a promising statistic for a campus that is recognized for social mobility and first generation students' success. Research trends suggest that many of Fitchburg State's key initiatives hold promise for increased future philanthropy.

### **Priority #1: Philanthropic Impact**

Strengthen the awareness of the impact of philanthropy among students, faculty, staff, alumni, parents/guardians, friends, corporations, foundations, and the greater North Central Massachusetts community.

- Advocate for the Foundation's impact on the University through donor profiles, publicity around gifts and stories of philanthropic transformational impact
- Provide diverse and sustainable resources for programming, especially in those areas highlighted in the Strategic Plan that require new resources, such as education justice, diversity, equity, Open Education Resources, and higher education access
- Lead the culture of philanthropy, increasing faculty, staff, parent/guardian, and alumni giving

### **Priority #2 Financial Vitality**

Increase revenue to the University to continue to build our financial vitality.

- Raise at least \$6.5 million by FY27
- Increase the endowment's donated principal by \$5 million by FY27
- Grow cash transferred from the Foundation to the University to \$1 million annually by FY27
- Increase annual grants from state, federal, corporations and private foundations to \$3 million by FY27
- Raise \$10 to \$15 million for facilities improvements by FY27
- Deliver market returns at or above benchmark policy set for our investment portfolios

### **Priority #3 Robust Governance**

Ensure ethical and responsible operations and governance

- Secure and share information resources to benchmark and create efficient, effective, and innovative operations
- Ensure board members remain current and aligned with university, industry, and governance issues and trends
- Recruit and engage a diverse group of Foundation board members who can assist in fulfilling the core philanthropic mission

## Institutional Advancement Unit Strategic Plan

### Priority #4 Proactive Alumni Engagement

- Increase alumni engagement through multiple methods of interaction including avenues such as social media, electronic communications (emails and e-newsletters), and peer-to-peer interactions
- Increase alumni diversity and participation in special events both virtually and in-person (on campus and throughout the country)
- Increase alumni participation in the Admissions process through volunteering at college fairs, phone calls to prospective students, participating in alumni panels and interacting with prospective students on campus and through virtual meetings
- Strengthen campus partnerships and collaboration to maximize constituent engagement throughout the student to alumni to donor life cycle
- Track and profile multi-generational Legacy Families
- Identify and recruit alumni social media influencers to help spread Fitchburg State's unique brand awareness and educational opportunities
- Collaborate with Career Services to enhance job-shadowing opportunities, create internships and offer career mentoring to current students utilizing both virtual and in-person channels
- Collaborate with the Admissions office to create a library of alumni career profiles to help demonstrate the "return on investment" of a Fitchburg State University degree
- Work with alumni in commercial and digital filmmaking to incorporate branded merchandise into high visibility placements in their productions for large-scale (overt and subliminal) exposure
- Institute efforts to encourage alumni to give back non-monetary support of their alma mater, such as volunteering, donating campus memorabilia to the Archives or participating in the Oral History Project and sharing their Fitchburg State stories (These efforts will be another gateway to encouraging financial support for Fitchburg State)

### Priority #5 Culture of Philanthropy

- Increase alumni giving to the annual fund and other areas of campus through multi-channel campaigns including social media, direct mail, phonathon and email campaigns; specifically working to identify generational decades, ages, life-stages and target affinity groups (i.e. Greek life, clubs, athletics, graduation year)
- Continue to build a culture of philanthropy with existing students through Class Gift Campaigns
- Actively engage student workers and student interns for Phonathon, Homecoming, Senior Class Gift Campaign and alumni engagement videos and donor stewardship events and correspondence. The Office of Alumni and Development is often the first exposure to organized philanthropy that many of our students encounter. These students, many of whom are influencers among their peer groups, gain an understanding of why and how people choose to 'give back/pay it forward' to their *alma mater* as well as unique exposure opportunities that can lead to greater civic leadership skills upon graduation.

## Institutional Advancement Unit Strategic Plan

- Engage accepted students, parents/guardians in making annual gifts and maintain the connection and importance of giving through graduation, rising career trajectories, and into provisions in estate planning and bequests

### **Conclusion**

The strategies and goals outlined in this document are ambitious but attainable, in keeping with Fitchburg State's bold aspirations and potential. Achieving objectives around undergraduate and graduate education, research, and academic excellence will require careful planning, strategic investment, and courage to make difficult choices.

Because the return on Advancement is exponential, investment in that enterprise must be seen as an essential component of any long-term effort to raise the profile of the campus. The continued work in developing and executing on initiatives is critical in support of realizing important institutional goals. It should also be noted that the time between investment in Advancement and the return is not instantaneous. Advancement is about building relationships and relationships take time.

The distance between investment and return in Advancement demands that the campus think carefully about metrics set, how the Advancement organization is held accountable for results, and how its activities are sequenced vis-à-vis campus planning.

Now is the time to build a more sophisticated, best-in-class Advancement program with the resources, talent, and focus to make sustained, profound progress in building the Fitchburg State brand. A strong, vibrant, responsive Advancement organization will accelerate excellence, raise stature, and invigorate an institution that is ready to assume its leadership among some of the state's great regional comprehensive educational institutions.