

Relating the Development Plan to The Strategic Planning Survey:

I. How should UNT grow over the next 5 years?

The extent to which the university will influence its growth—the quantity of students, the diversity of students, quality of students and the academic disciplines of the students—will be impacted most favorably by the strategic plans set forth by Academic Affairs, Student Development and Enrollment Management. However, arguably, every area of the university has an impact in some way on the growth, and shaping the growth, of the university. For instance, among other potential impacts, the Administrative Affairs strategic plan will help to shape the growth in facilities to meet the growing demands of students for housing, classrooms, auxiliary services, campus community and campus activities; the Research and Technology Transfer strategic plan will help to shape the quality and academic disciplines of students we attract as we increase opportunities for expanded learning opportunities in labs; the University Relations, Communications and Marketing strategic plan will help shape the image of the university, its strategic marketing efforts, communications of who and what we are becoming as a university, as well as targeted recruitment activities; the Business and Financial Affairs strategic plan will help shape the manner in which funding from state resources are funneled into the strategic areas of emphasis for the desired growth strategies to work; and the Diversity & Equity strategic plan will directly impact our efforts to develop a more diverse student population. The Office of Development will be an integral part of helping to shape the growth of the institution by developing strategic private funding resources to help support the implementation of these strategic initiatives for influencing growth.

More specifically, the Office of Development will help shape the growth of the university through strategies that include:

- a. Seek private funding for scholarships, fellowships, internships and assistantships, and financial aid targeted for students:
 - a. in specific disciplines,
 - b. at determined levels of academic achievement,
 - c. of certain student populations (geographical).
- b. Seek private funding for the development of specific programs, centers of excellence, learning enrichment programs that make UNT a more attractive institution of choice among our target students.
- c. Seek private funding for the support of campus life enrichment and student development programs and activities that attract our target students.
- d. Seek private funding for our collegiate athletic programs and auxiliary student organizations that provide opportunities for student involvement and participation from all UNT students who wish to take part—from participation in an auxiliary program such as marching band, cheerleading, dance teams, etc.—to participation as a spectator and in pre and post game activities.
- e. Seek private funding for enhanced faculty positions of distinction—such as Professorships, Lectureships, and Endowed Chairs—which will aid in the recruitment of higher quality students and students of particular academic disciplines.
- f. Seek private funding for the enhancement of certain facilities which will make UNT a more attractive choice for our target students.
- g. Seek unrestricted private funding that will enable the administration to more aggressively pursue the implementation of the strategic plan for the university which will make UNT a more likely choice among our target students.

Components for a successful development program:

Over the past several years, the Office of Development has been strategically building and enhancing its development operation. There are several components of the development operation that are essential to its functionality and future success.

a. Research & prospect management:

Research is the key to the identification and qualification of prospective donors to the university. Once the prospects are identified, prospect management, through several steps in the development process, is key to strategic donor cultivation and maximization of gift potential. The research and prospect management components are being enhanced to provide for more proactive prospect identification. The goal is to be able to provide 5 quality "qualified" prospect leads weekly to each of our external fundraising staff. In addition, with the implementation of the prospect management module of the new *PeopleSoft* – EIS system, prospect assignments and tracking, management and strategic development, as well as enhancements in data mining and institutional memory will provide for greater efficiencies in donor development and reporting. Further, the Director of Prospect Research is developing a structure within the department that will increase productivity and provide for enhanced capability. This new structure should be in place by May of 2005.

b. Quality and quantity of fundraising staff:

With over 80,000 alumni in the Dallas-Fort Worth region, it is essential that the Office of Development continue to expand its fundraising staff in order to expand our fundraising efforts. In 2005, the Office of Development will grow its fundraising staff by 3 new positions. With administration support, this trend will need to continue in an effort to optimize the fundraising program at the university. In addition, we are seeking to enhance the quality of the staff in several ways—through a more discriminate selection process for new staff, and by raising the expectations of continued education and professional development of the current staff. The Office of Development has initiated a professional development program within the department and offers external professional development opportunities to staff as well. In an effort to expand our efforts and capitalize upon fundraising opportunities, it is imperative that the fundraising staff expand their knowledge and develop strong fundraising skills and that they employ all the fundraising tools at their disposal in an effort to maximize their fundraising potential.

Development/Fundraising Goals & Strategies:

The goal of the Office of Development is to continually increase the annual giving base to the university while developing significant major gifts to the university each year, all in an effort to help provide funding for the support of the university mission and to assist in realization of its vision. We will achieve this goal through the execution of a well organized and strategically implemented development plan.

Development Strategies:

a. Expand the donor base:

In order to meet the long-term fundraising needs of the university, it will be necessary to expand the donor base of alumni and friends, corporations and foundations making gifts to the university. From an expanded donor base, the identification of new major donor prospects will increase opportunities to fund special initiatives while building and solidifying a strong base of support to assist in meeting the current and ongoing needs of the university. This will be accomplished through:

1. Increased contact activity and donor development (focus on new contacts);
2. Building upon annual giving constituent development programs such as President's Council;
3. Expansion of alumni appreciation programs;
4. Special events;
5. Promotion of increased alumni participation in university programs such as the NT Exes, boards, volunteer activities, music venues, visual and performing arts, lecture series, sporting events, etc.

b. Promote development activities by other faculty & staff:

With a limited number of external development staff, it is imperative that the Office of Development encourage and support other human resources that are willing to devote time and energy into fundraising activities. By leveraging the skills and knowledge of our development staff, while empowering others to take on fundraising initiatives, the result is a multiplication of time and effort that would otherwise be virtually impossible. This has the added benefit of capitalizing on existing relationships of faculty and staff, which otherwise might go untapped. The development professional acts as a resource for development of fundraising strategies and identification of prospects, and then facilitates fundraising with efforts on an as needed basis to close primed donor prospects. The development staff is able to stay focused on other priority fundraising objectives.

c. Champion special projects/mobilize volunteers

As Office of Development focuses efforts on numerous priority fundraising initiatives in complement to the strategic plan for the university, and in coordination with priority fundraising needs of each of the Colleges and Schools, the championing of other special projects in the organization and development of a strategic fundraising plan, will help to mobilize volunteer leadership and volunteer labor in execution of the plan. Again, this multiplies efforts that would otherwise not be possible.

d. Pursue major donors

Annually, up to 85% of the total gifts to the university will come from major donors, donors who give \$25,000 or more in that year. It is essential, therefore, that a majority of effort be devoted to the identification, cultivation and solicitation of major gift prospects. This strategy involves the identification of new major gift prospects, while continuing the stewardship and cultivation of existing major donors. Hence, the best prospects for future major gifts will come from the existing donor pool. Most of these donors will be President's Council donors before they become major donors.

Planned gifts are another chief resource for major gifts on an annual basis, as donors consider their "ultimate legacy" gift. In fact, since 1985, over 30% of all realized gifts annually to higher education have come from estates—bequests or other deferred gifts. (Source: Giving USA 2004). This statistic has not held true, however, for the University of North Texas. From 1996 to 2002, matured planned gifts to the university only made up .4% to 8.7% of total giving in any year. However, in 2003 and 2004, matured planned gifts accounted for 15% and 14% respectively of total giving. Thus, with the more than 300% increase of planned gift inventory since 1996, resulting from the aggressive planned giving development plan, anticipation of higher planned gifts realized on an annual basis will ultimately lead to an increased base of support.

Thus, continued expansion and development of the estate, gift and retirement planning services offered to alumni and friends will lead, not only to increased planned gift inventory, but also, over time, to an increase the anticipated base support in current gifts to the university.

Total Resource Development:

With ever-increasing demands for funding to support the mission and vision of the university, the Office of Development will need to expand its efforts in the development of not only private gift support, but other key sources of financial support (revenue) to the university. This concept is known as Total Resource Development (TRD). In addition to private gift development, TRD would include resource development from advertising, contracts, partnerships, cooperative programs, joint ventures, patents, royalty interests, sponsorships and other revenue streams.

As the university strives to create revenue streams to support the master development plan, including Eagle Point campus, the men's and women's athletic facilities and a new football stadium and complex, etc., numerous TRD opportunities could develop. The university needs to be poised to capitalize on various resource development strategies. This will require broadening the scope of influence of the office of development to include TRD and provide a means to include TRD in measuring performance.