

**COLUMBUS STATE UNIVERSITY**  
**STRATEGIC PLANNING PROCESS**  
**UNIVERSITY ADVANCEMENT**

**Part I. Division Mission and Goals.**

The Mission, of the Division of University Advancement, is to support Columbus State University's mission of promoting educational, economic, social and cultural growth in Georgia and beyond, through excellence in higher education programs and service to the region.

The Division of University Advancement is charged with activities which relate to and which support Columbus State University's Strategic Planning goals 1, 3, 5, 10 and 11, and particularly goal 6.

University Advancement goals, in support of these university goals are:

1. Promote and enhance the image of CSU (Goals 2 and 10)
2. Cultivate friends and supporters of CSU (Goals 1, 3 and 6)
3. Raise funds to support and enhance the academic programs of CSU and demonstrate careful stewardship of those funds (Goals 1,3 and 6)

**COLUMBUS STATE UNIVERSITY**  
**University Advancement**  
**FY 2006 STRATEGIC PLANNING ASSESSMENT: LEVEL 2**

Goal*		Planning Initiative	Assessment and Use of Results
Institutional	Unit		
8	3	Grow Tower Society by 10 members, and Founders Society by 25 members.	<p>As of June 15, 2006, 12 new Tower Society members and 40 new Founders Society members have been recruited. Goal has been exceeded.</p> <p>Prospective Tower Society members were invited to events allowing them to see the impact of the Society's investment in CSU and hear first-hand how students benefit from the Society's consistent support. All prospective members who attended an event joined the Tower Society.</p> <p>This model was successful and will be used to recruit members during the 2006 – 2007 annual fund.</p> <p>Current Founders Society members and CSU Foundation Trustees were enlisted to recruit Founders Society members from a list of \$250 - \$999 donors. They were given a "case for support" to use for enlisting new members. A Founders Society pledge card was developed and distributed.</p> <p>Using Trustees to help solicit Founders Society level gifts was a successful strategy and will be used in FY07 as well.</p>

Goal*		Planning Initiative	Assessment and Use of Results
Institutional	Unit		
4,8	1,2,3	Increase number of donors to Annual fund by 5%	<p>As of June 27, 2006, 3429 donors have made donations to the annual fund, which represents a 15.1% increase. An intense phone campaign is underway. We have exceeded this goal.</p> <p>Our phone campaign has two goals: reconnecting with CSU alumni and friends and to raise funds. Student callers have been trained to make the potential donor feel good about the call, and to reinforce the “case for support” in the pre-call letter. Student callers work through a 3-ask scenario with a “participation” gift as the last ask.</p> <p>During the fall phonathon we intend to call every alumnus with a phone number using the same method.</p>

Goal*		Planning Initiative	Assessment and Use of Results
Institutional	Unit		
8	1,2,3	Increase unrestricted giving by 10%	<p>As of June 15, 2006, \$555,711 has been raised in unrestricted gifts which is a 11.5% increase. We have exceeded our goal.</p> <p>During the Annual Fund Steering Committee/Trustee retreat held in August 2005, unrestricted giving was on the agenda. A recommendation was made to give unrestricted giving a name so that it would have an identity separate from the other annual fund buckets (art, theatre, music, and athletics). This recommendation was implemented. Additionally, we eliminated all categories except for “unrestricted” on annual fund and CSU Day pledge cards and added a “case for support” on the back of the pledge cards.</p> <p>The name “The Partnership Fund” was chosen because of the unique partnership CSU has with our community.</p> <p>In February, we presented a “case for support” for unrestricted giving to CSU Foundation trustees followed by a brainstorming session. This resulted in elimination of the name “The Partnership Fund”. Our trustees felt the name was not descriptive of the impact of unrestricted giving nor did it help potential donors to understand the need for unrestricted funds. The name will be changed.</p> <p>A pre-call letter sent to all 2006 spring phonathon prospects included an “ask” for unrestricted funds. Student callers followed-up the letter by emphasizing unrestricted gifts and what they supported on campus. All asks were for a gift to the annual fund. We will expand and continue this format during the fall phone campaign.</p>

Goal*		Planning Initiative	Assessment and Use of Results
Institutional	Unit		
8,4	1,2,3	Complete all Investment in People Capital Campaign solicitations, finalize the campaign, hold the victory celebration by October 31, and provide stewardship/campaign impact reports.	<p>The Capital Campaign concluded on October 31, 2005 with total gifts and pledges of \$100,326,928. Four end-of-the campaign celebrations were held:</p> <ul style="list-style-type: none"> <li>• Honoring Major Donors (\$10,000+) - September 8, 2005, Heard Theatre stage.</li> <li>• Honoring campaign volunteers - October 20, 2005.</li> <li>• Honoring faculty/ staff who gave at the Honor Roll level - November 17, 2005.</li> <li>• A public celebration (band concert/fireworks) - November 6, 2005 on the Campus Green.</li> </ul> <p>Stewardship initiatives/campaign impact reports completed, or underway:</p> <ul style="list-style-type: none"> <li>• A video was shown at the “end-of-campaign celebrations” showing what the investments made in the campaign had already enabled, or would enable, the university to accomplish.</li> <li>• Donors who established named funds for endowed faculty chairs, scholarships, etc., or who funded facilities, receive periodic impact reports.</li> <li>• An end-of-the campaign publication is in process – projected publication date fall 2006. It will include the “campaign story,” a list of projects and funds established, and a complete donor listing.</li> </ul> <p>This campaign confirmed that a well-defined Case for Support is critical to a successful fund-raising effort. As preparations are finalized for our campaign to raise funds for the top priority endowment projects for the various colleges, particular attention is being given to the Case for Support.</p> <p>All campaign gifts are being carefully analyzed for use in the future:</p> <ul style="list-style-type: none"> <li>• Those who made smaller gifts, especially alums making first-time gifts, will be asked to consider increasing their support of the annual fund.</li> <li>• Those who made larger gifts (\$10,000+) will receive a special letter of thanks on the anniversary of their gift. As pledges are completed, they will be asked to consider increasing their support of the annual fund at a higher level.</li> </ul>

Goal*		Planning Initiative	Assessment and Use of Results
Institutional	Unit		
8	3	Increase planned gift expectancies from \$9 million to \$11 million.	<p>Planned gift expectancies (present discounted value) total \$12,392,471 as of June 30, 2006 - \$1,392,471 over goal.</p> <p>The planned giving page on the university website has been completely updated/revised and is updated monthly. Two planned giving newsletters are being published annually and a monthly e-mail is being sent with up-to-date tax information, etc. All of the above have a response mechanism. Responses are being tracked and evaluated to help in determining the most effective way to promote planned giving.</p>
8,4	1,2	Partner with campus departments, including Student Services and the Career Center, to involve alumni in Orientation, move-in day, mentoring current students, and other activities.	<p>The Alumni Association actively and successfully partnered with campus departments in activities such as homecoming, move-in day, a children's theatre production and lunch (Lunch with Santa), Freshman Convocation and three campus visitation days. Financial support was also provided to three student groups that partnered directly with the Alumni Association in some of these activities. While it is difficult to quantify the impact of these activities, alumni involvement in these activities has raised the visibility of the Alumni Association among current students. Based upon the success of these activities, we plan to continue these activities in FY 07.</p>

Goal*		Planning Initiative	Assessment and Use of Results
Institutional	Unit		
8	2,3	Involve Tower Scholars and Servant Leadership students in University Advancement projects, including fund-raising.	Tower Scholars attended the Annual Fund Kick-off, the Tower Society Dinner, and delivered CSU yard signs. Several opportunities to participate in fund-raising activities were extended to Tower Scholars and Servant Leadership students (including jobs with the Phonathon); however, we were not very successful in involving them in University Advancement activities. Many times throughout the year both Tower Scholars and Servant Leadership students were reminded that the expectation is that they will contribute back to the university as alumni. While it is difficult to objectively measure the immediate impact of these efforts, we will continue to stress the theme that alumni are expected to contribute back to the university to our students. We believe that these efforts will pay dividends in the future.
4	1	Coordinate a statewide media plan to help draw attention to what the university is accomplishing, especially in regards to the downtown campus.	Public Relations coordinated a contract with Georgia Trend whereby CSU had an ad in the statewide magazine every other month this year. Four of the six ads dealt with CSU's presence downtown. All the ads carried a similar look. We used the new look and went to the Cunningham Center and to CSU's Coca-Cola Space Science Center with it and coordinated all three ads to have a similar look and feel. A local advertising firm we consulted with said the effort was effective.
4	1	Coordinate a local media plan to help draw attention to what the university is accomplishing	Similar to what we did with Georgia Trend, Public Relations coordinated a series of ads with Columbus and the Valley magazine.
4	1	Develop a system of collecting and cataloging good "campus life" photography	This still needs attention. CINS has been exploring software options for months. However, we have started posting onto the Web pictures from various events, such as CSU Day. We don't yet have a central system of doing this though.

\* Institutional Goals were established in the University Strategic Plan (2000-2005). Unit Goal addresses the Institutional Goal.

**COLUMBUS STATE UNIVERSITY  
UNIVERSITY ADVANCEMENT  
FY 2007 LEVEL 2 PLAN**

Goal*		Planning Initiative	Cost	Planned Impact (Outcome)
Institutional	Unit			
1,6	2,3	Raise \$1,500,000 in the 2006 – 2007 annual fund, by securing 33 new \$1,000+ donors, increasing foundation gifts by 3.5%, and increasing alumni participation to 15%.		Provide additional funding for campus-wide programs and broaden donor base.
1,6	2,3	Increase gifts to the unrestricted portion of the annual fund by 10%.		Provide additional funding for campus-wide programs funded by unrestricted gifts.
1,6	2,3	Create and begin to implement a plan to solicit annual fund gifts from capital campaign donors as they complete their capital campaign pledges.		Provide additional funding for campus-wide programs.
1,6	2,3	Host, co-host, provide funding and other support for at least three alumni cultivation events (reunions, receptions, affinity group or college related events) in and outside of Columbus in concert with Major gifts Officer.		The planned impact of these events will be to keep alumni informed, engaged, and involved in CSU.
1,6	2,3	Organize an alumni chapter		Expand the opportunity for Columbus State University alumni to reconnect with the University.
1,6	2,3	Develop and implement a plan to cultivate and solicit parents of CSU students.		Provide additional funding for campus programs.
1,6	2,3	Prepare for a retreat for the Alumni Board to be held early in the FY 08 fiscal year.		Create a strategic plan of work for CSU's Alumni Board.
1,2,3,6,8,11	3	Secure \$3.5 million in gift commitments toward the University's top priority endowment and capital objectives.		Provide funding to advance and promote excellence for the various colleges/units.
1,2,3,6,8,11	3	Increase planned gift expectancies (present discounted value) by \$2 million to a total of \$13 million.		Assure funding for future programs and capital projects.
6	2,3	Fully implement the "Stewardship Plan" approved by the CSU Foundation Board of Trustees on February 14, 2006.		Lasting relationships will be built with those who support the university with their wealth, wisdom and work.

Goal*		Planning Initiative	Cost	Planned Impact (Outcome)
Institutional	Unit			
6, 7	1, 3	Continue to refine and develop Advancement Services policies and procedures, including processes for donor identification, acknowledgement, reporting, and payment methods.		Will allow fundraising initiatives to focus on the proper constituents and provide a means for analysis, will provide improved stewardship opportunities, and will increase donations.
6	1, 2, 3	Devise and implement a plan for using our database to regularly communicate with alumni and donors and allow them a method to transmit information and gifts.	\$4,950	Will improve the image of the University and support organizations, will encourage involvement from alumni and donors, and will increase donations.
6	3	Work with the Finance Committee of the Foundation to analyze the expenditures from the Unrestricted budget and to develop a budget for the following fiscal year to be submitted to the Executive Committee one month before the Annual Trustee meeting.		Will improve accountability and help to identify areas for cost control to provide more funds for University program support.
11,2,1	1	Overhaul university's home page and institute a common look and feel across most of the Web pages under the university's domain. Systematically update the content of higher-level university Web sites, with priority for those focused on external groups/identified as strategically important for the university.		The Web site is now the most used and most effective communication vehicle for the university. Having an effective, attractive and easy-to-use Web site enhances our ability to deliver our messages more effectively to prospective students and to prospective staff and faculty. More clearly identifying all our top-tier sites as being affiliated with CSU also clarifies our message and our mission, providing more awareness of CSU, its impact and its vision to all our audiences. This initiative will lead to better satisfaction with our Web site, more Web visitors and more online applications to better serve visitors and current CSU community citizens.
2,1	1	Develop and coordinate publicity, media exposure, and signage connected with the university's expansion into downtown Columbus this fall.		Attract statewide and regional attention to CSU's facilities and programs; grow awareness of the university and its fine and performing arts program; ensure a smooth and identifiable transition into the downtown area.

<b>Goal*</b>		<b>Planning Initiative</b>	<b>Cost</b>	<b>Planned Impact (Outcome)</b>
<b>Institutional</b>	<b>Unit</b>			
11,2,1	1	Continue to work to deliver the message of CSU's growth, impact and stature to audiences that have no impression – or an outdated one – of the university. We'll do this by honing CSU's advertising message for statewide publications, and by developing an updated "About CSU" video to use during HR orientations and speaking engagements.		An increased awareness of CSU and what the university is doing will contribute to more funds being raised, more hits to the Web site and more applications from prospective students.

\* Institutional Goals were established in the University Strategic Plan (2006-2011). Unit Goal addresses the Institutional Goal.

### **Part III. Executive Summary: University Advancement**

There were two particular areas in our fund-raising activity for FY 06, which were very positively impacted because of the strategic planning process. First was the setting of the goal of 25 new Founders Society members for FY 06. We had never before set a specific target for the number of new Founders Society members (donors who contribute at least \$1,000 to the university in one year), but this year, in connection with the implementation of a Strategic Plan for the CSU Foundation, our Annual Fund team set a specific numerical goal for new Founders Society members. Having that specific goal at which to aim, pushed us to develop strategies to achieve that goal. One particularly effective strategy was to go to our Foundation Board of Trustees with a request that each of them help us recruit and solicit one new Founders Society member. We used our time with our Board members at their February meeting to outline the benefits of giving to the Annual Fund and to ask them to select prospects to solicit for Founders Society membership. The result of setting the goal and developing a specific strategy to achieve that goal was that we received great help from our Trustees and exceeded our goal by recruiting 40 new members of the Founders Society for FY 06. This results in an additional level of giving to the university and, of course, has an important impact on all of our academic programs.

Another specific goal which we set for our development efforts for this year was to increase our unrestricted giving by 10%. The setting of this goal resulted from an analysis of our CSU Foundation budget and the realization that we had not been raising enough unrestricted money to sufficiently fund many of the activities which relied specifically on unrestricted giving. Again, we called on our Foundation Board of Trustees, used our February Board meeting to educate them on the many important programs which are supported by unrestricted giving, and asked them to help us solicit a larger number of unrestricted gifts. The result of setting this specific strategy is that our unrestricted giving was up by 11.5% this year. Again, we exceeded the goal that we set.

Perhaps one of the major accomplishments to showcase this year would be the coming to fruition of many of the Capital Campaign efforts. The Cunningham Center has been open and functioning actively for over a year now, and has brought great visibility and community connectivity to the university. A number of the endowed faculty positions which came from the Capital Campaign are being filled for the first time this year and are bringing outstanding new faculty to Columbus State University. Additionally, a number of the new endowed scholarship funds are being awarded for the first time, resulting in increased numbers of academically talented students who are attracted to Columbus State because of the scholarship funding available. Finally, this year has seen the building of the new theatre and art complex in uptown Columbus which is scheduled to open in mid August of 2006. This is, of course, a major accomplishment of the Capital Campaign and will change the face of uptown Columbus for years to come.

Looking to the future, we remain confident that the strong relationships which have been forged over the last decade will continue to provide great support for this university. We

believe that the Annual Fund will continue to grow, that we will be able to continue to raise significant major gifts, and that the university will benefit from many of the planned gifts and bequests, which came as a result of the Capital Campaign. We look forward to an increasingly inter-connected effort between University Advancement and the academic units as we work with deans and faculty to develop a case for support for the colleges and seek to involve deans and faculty in our stewardship efforts as well as our solicitation initiatives.