



# Institutional Effectiveness Plan University Advancement

# Advancement

Making forward progress related to a university's strategic plan

- **Alumni Engagement**
- **Communications**
- **Development**
- **Foundation Finance & Operations**
- **Marketing**
- **The UAFS Foundation Inc.**





# 2024-2025 Highlights

- **The Campaign**
  - Launched Public Phase on April 2, 2025 and Finished FY25 Ahead of Schedule
- **Alumni Engagement**
  - Surpassed Day of Giving Goals and Began Implementation of New Strategies
- **Development**
  - Key Commitments for Centers of Excellence and Successful Public Phase Strategies
- **Communications**
  - Record Engagement Across Owned and Earned Media and Print Strategies
- **Marketing**
  - Records in Web/ChatBot Traffic, Licensing/Royalties, and Community Initiatives
- **The UAFS Foundation Inc.**
  - Set a New High-Water Mark for Total Assets



# Strategic Plan 1.1

Drive interest in UAFS as a first-choice institution and invest in innovative recruiting practices to ensure continued enrollment growth.

## FY 25 Objective

- Continue to adjust and evolve recruitment marketing tactics, emphasizing proven and effective strategies.

## Results

- Website (FY25)
  - Sessions- 1,016,286
  - RFI Ratio- TBD
  - Avg. Search Position- 22.8
  - ChatBot Sessions- 10,506



# Strategic Plan 1.1

Drive interest in UAFS as a first-choice institution and invest in innovative recruiting practices to ensure continued enrollment growth.

## FY 26 Objective

- Continue the evolution of the recruitment marketing strategies. Aside from the current tactics, additional emphasis will be placed on RFI Forms, Slate Events, and ChatBot data. This information will lead to a better understanding of conversion tactics. Furthermore, landing page optimization will continue with a goal to affect Average Search Position.

## Goals

- Website (FY25)
  - Sessions- 1,000,000
  - Slate Events- 250,000
  - RFI Forms- 20,000
  - ChatBot Sessions- 12,000
    - Baselines to be set
      - Messages Sent
      - “Thumbs Up” Rating
      - Hours of Time Saved
      - Avg. Response Time
      - Conversations
      - Top Topics



## Strategic Plan 1.4

Optimize comprehensive institutional and private aid practices to ensure a UAFS education is accessible to all.

### FY 25 Objective

- Optimize the deployment of UAFS Foundation student aid mechanisms.

### Results

- Scholarships
  - Available- \$4,076,513
  - Awarded- \$3,146,742
  - Percent- 77%
- Students Awarded- 1,937
  - Average Amount- \$1,625
- New Scholarships- 4
  - Amount- \$608,929



## Strategic Plan 1.4

Optimize comprehensive institutional and private aid practices to ensure a UAFS education is accessible to all.

### FY 26 Objective

- Increase the volume of UAFS Foundation aid and align with strategies to maximize comprehensive aid leveraging.

### Goals

- Scholarships
  - Available- \$4,000,000
  - Awarded- \$3,200,000
  - Percent- 80%
- Students Awarded- 2,000
  - Average Amount- \$1,600
- New Scholarships- 10
  - Amount- \$250,000



# Strategic Plan 1.6

Continue to invest in and promote the UAFS brand while developing new ways to tell the UAFS story across constituent groups.

## FY 25 Objective

- Expand local brand strategies, grow the licensing and royalties program, and evolve strategies to tell the UAFS story.

## Results

- Community Strategies
  - Paint the Town Blue- 99
  - Perk Stop- 15
  - Alum Owned Business- 47
- Strategic Communications
  - Social Media
    - 13.1M Impressions
    - 50,911 Engagements
    - 235 Accounts
  - Newsroom
    - 200 Releases Distributed
    - 75,515 Page Views
    - 1:09/page
  - Newsletters
    - 65 Newsletters
- Print Publications
  - Belltower- 18,000
  - Chancellor's Report- 3,000
  - Foundation Report- 400
- Licensing Management
  - Royalties- \$11,582
  - Gross Sales- \$95,316
  - Total Units- 7,074
  - Licensed Vendors- 61
  - Retail Locations- 8
- Earned Media Coverage
  - 3,015 Mentions
  - 389 News Sources
  - 601.8k Impressions
  - 0.75% Neg Sentiment



# Strategic Plan 1.6

Continue to invest in and promote the UAFS brand while developing new ways to tell the UAFS story across constituent groups.

## FY 26 Objective

- Continue the expansion of local brand strategies, grow the licensing and royalties program with an emphasis on new retail locations and expansion of the Walmart partnership, and expand the already successful strategy of telling the UAFS story.

## Goals

- Community Strategies
  - Paint the Town Blue- 105
  - Perk Stop- 17
  - Alum Owned Business- 50
- Strategic Communications
  - Social Media
    - 13M Impressions
    - 60,000 Engagements
    - 200 Accounts
  - Newsroom
    - 200 Releases Distributed
    - 70,000 Page Views
    - 1:00/page
  - Newsletters
    - 65 Newsletters
- Print Publications
  - Belltower- 18,000
  - Chancellor's Report- 3,000
  - Foundation Report- 400
- Licensing Management
  - Royalties- \$15,000
  - Gross Sales- \$100,000
  - Total Units- 7,500
  - Licensed Vendors- 65
  - Retail Locations- 10
- Earned Media Coverage
  - 3,000 Mentions
  - 350 News Sources
  - 1M Impressions
  - 1% Neg Sentiment



## Strategic Plan 2.3.4

Establish centers of excellence to enhance academic programs in high-demand fields, support student success, and power the regional economy.

### FY 25 Objective

- Utilize comprehensive advancement strategies to support the Centers of Excellence.

### Results

- \$7.625M to Establish the Center for Nonprofits (Economic Development)
- \$60k for Nursing and Engineering Scholarships (Health Sciences & Advanced Manufacturing)
- \$35K to Art Scholarships (Art & Design)
- \$25k to Nursing Scholarships (Health Sciences)
- Specialized Workforce Marketing Campaign to Boost CTE in the Region (Economic Development)
- Facilitated Data Science Listening Tours (Data Science)
- All 5 Centers Represented in the Chancellor's Report and 4 in Belltower



## Strategic Plan 2.3.4

Establish centers of excellence to enhance academic programs in high-demand fields, support student success, and power the regional economy.

### FY 26 Objective

- Expand on the advancement support of the Centers of Excellence and intentionally grow each center related to the capabilities within advancement.

### Goals

- Begin capital project fundraising for a Center for Advanced Manufacturing (Advanced Manufacturing)
- Begin capital project fundraising for a Center for Health Innovation (Health Sciences)
- Continue Major Gift/Grant Fundraising in Support of the Center for Nonprofits (Economic Development)
- Begin Planning External Engagement Strategies for Windgate Expansion Grand Opening (Art & Design)
- Complete Facilitated Listening Tours for Computer and Data Science (Computer and Data Science )
- All 5 Centers represented in the Chancellor's Report, Belltower, and NEW Foundation Annual Report



## Strategic Plan 4.1.2

Advance the strategic priorities of the institution through meaningful philanthropic partnerships with individuals, corporations, and foundations, and align these resources to support student success, and empower transformative investments.

### FY 25 Objective

- Achieve year-over-year goals of the development operations with specific strategies leading up to the public launch of the comprehensive campaign.

### Results

- Development
  - Production- \$15,637,944
  - Receipts- \$7,039,022
  - Proposal- 59
  - Visits- 157
  - Contacts- 408
- Campaign Progress
  - Amount-\$72,650,757
  - Percent to Goal-85%



## Strategic Plan 4.1.2

Advance the strategic priorities of the institution through meaningful philanthropic partnerships with individuals, corporations, and foundations, and align these resources to support student success, and empower transformative investments.

### FY 26 Objective

- Build on the strong launch of the public phase of the comprehensive campaign and deploy the development strategies that have been built for this purpose.

### Goals

- Development
  - Production- \$10,000,000
  - Receipts- \$8,000,000
  - Proposal- 150
  - Visits- 500
  - Contacts- 1,000
- Campaign Progress
  - Amount-\$80,000,000
  - Percent to Goal-94%



## Strategic Plan 4.2.3

Cultivate and expand purposeful, long-term, and mutually beneficial community partnerships, foster philanthropic efforts, and contribute to the region's social, economic, and environmental success.

### FY 25 Objective

- Expand the alumni engagement operation and grow corporate partnerships.

### Results

- Alumni Engagement
  - Total- 34,203
  - Non-Degree- 19,787
  - Events- 13/7
  - Registered- 1,319
  - Attended- 939
  - Email Capture Rate- 100%
  - Participation- 0.48%
- Corporate Sponsorship
  - Companies- 43
  - Production- \$123,459



## Strategic Plan 4.2.3

Cultivate and expand purposeful, long-term, and mutually beneficial community partnerships, foster philanthropic efforts, and contribute to the region's social, economic, and environmental success.

### FY 26 Objective

- Continue deploying the new alumni engagement strategic plan tactics and continue evolving the corporate partnership strategies.

### Goals

- Alumni Engagement
  - Total- 35,000
  - Non-Degree- 20,000
  - Events- 15/7
  - Registered- 1,200
  - Attended- 900
  - Email Capture Rate- 100%
  - Participation- 1%
- Corporate Sponsorship
  - Companies- 40
  - Production- \$120,000



## Strategic Plan 4.2.7

Strengthen institutional scholarship offerings and foundation endowments to ensure accessible and affordable opportunities for all students and support the transformative impact of UAFS on their lives and careers.

### FY 25 Objective

- Continue strategies to grow the overall portfolio of the UAFS Foundation.

### Results

- UAFS Foundation
  - 6/30 Portfolio Balance- \$155,468,673
  - 6/30 Endowment Balance- \$113,919,085
- Endowed Funds
  - Available- \$3,755,050
  - Awarded- \$2,968,152
  - Percent Spend- 79%
- Gift Revenue-FY26 Budget
  - Total- \$7,961,854



## Strategic Plan 4.2.7

Strengthen institutional scholarship offerings and foundation endowments to ensure accessible and affordable opportunities for all students and support the transformative impact of UAFS on their lives and careers.

### FY 26 Objective

- Continue strategies to grow the overall portfolio of the UAFS Foundation and expand on opportunities for the campus to utilize and plan with Foundation funds.

### Goals

- UAFS Foundation
  - 6/30 Portfolio Balance- \$165,000,000
  - 6/30 Endowment Balance- \$115,000,000
- Endowed Funds
  - Available- \$5,175,000
  - Awarded- \$4,140,000
  - Percent Spend- 80%
- Gift Revenue-FY27 Budget
  - Total- \$9.5M

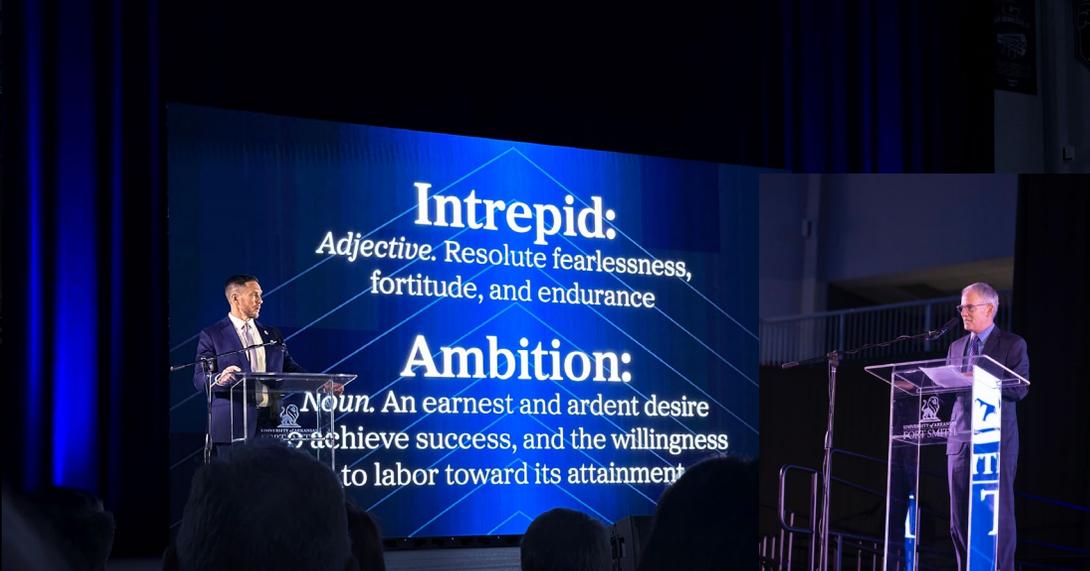
# Short-term Resource Requests for FY27

Resource Description	Alignment with strategic plan pillar	Budget request on going	Budget request one time	Total of budget request for FY26
FY27 Budget Reductions from University Advancement Cost Centers	4.2.4	-\$93,550 (Supplies/Services)		-\$202,050
FY27 Budget Reductions from University Advancement Cost Centers		-\$108,500 (Salaries)		
<u>Institutional Salary Adjustments</u> By Priority & When Available	2.2	TBD	TBD	TBD
1. Cost of Living Adjustment				
2. Raise the UAFS salary floor to the higher of \$15/hr. or 15th percentile of CUPA data, following up on previous efforts to reach the 10th percentile with a long range goal of sustaining a floor of 25th percentile.				
3. Merit pool to reward high performers				



# Long-term Resource Requests

Resource Description	Alignment with strategic plan pillar	Budget request on going	Budget request one time	Total of budget request for FY??
<b>Institutional Salary Adjustments By Priority &amp; When Available</b>  1. Cost of Living Adjustment  2. Raise the UAFS salary floor to the higher of \$15/hr. or 15th percentile of CUPA data, following up on previous efforts to reach the 10th percentile with a long range goal of sustaining a floor of 25th percentile.  3. Merit pool to reward high performers	2.2	TBD	TBD	TBD
Targeted Efforts in Strategic Recruitment Marketing and Advertising	1.1	\$250,000		\$250,000
Celebrate the Centennial and Conclusion of the Campaign	1.6	<b>\$300,000</b> (City-wide marketing push e.g. billboards, increase in mailing and print, and events)	\$300,000	



INTREPID  
AMBITION

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CAMPAIGN *for the* RIVER VALLEY