

**Division of University Development and
Alumni Relations**

University of South Carolina

**Blueprint for Service Excellence
Fiscal Year 2010-2011**

April 15, 2010



**U N I V E R S I T Y O F
SOUTH CAROLINA**

I. Vision, Mission and Goals

A. Executive Summary

Blueprint for Service Excellence 2010-2011

VISION

The Division of University Development and Alumni Relations will be recognized as a national leader in their respective areas. Efforts will result in increased private commitment in the University, and an Alumni Association that engages fully and calls to action.

MISSION

The mission of the Division is to increase understanding and support for the University in order to help attract excellent students and faculty, improve program quality and academic reputations, and advance research and scholarly productivity by executing high quality alumni and fundraising programs.

GOALS

1. Increase philanthropic support for the University.
2. Engage, inform and motivate prospective donors through communications/marketing strategies and channels to increase philanthropic support for the University.
3. Ensure that alumni are informed, involved and committed to the success of the University.

B. Goals, Initiatives and Action Plans

In view of the mission stated above, the following goals are adopted.

Goal 1. Increase philanthropic support for the University.

Initiative: 1 (a) Raise \$115 million in production (gifts and new pledges).

Craft strategies with deans, faculty, directors of development (DODs) and volunteers to solicit gifts from alumni, parents, friends, corporations and foundations. Recruit and retain professional fundraising staff and conduct training sessions for deans, vice presidents and DODs. Increase private support through major gift programs, annual giving programs, regional programs and gift planning programs.

Goal 2. Engage, inform and motivate prospective donors through communications/marketing strategies and channels to increase philanthropic support for the University.

Initiative: 2 (a) Present a high-quality, engaging, informative and coordinated web presence – including improving the online giving donor experience – to actively communicate the successes and support the needs of the Development Division and to help reach goals of the Capital Campaign.

Initiative: 2 (b) Develop consistent Campaign theme, messaging and supporting content that articulates vibrant vision and needs of the University.

Initiative: 2 (c) Research and create ongoing new content that tells the stories of philanthropy and Campaign needs in vivid ways through video, digital, web, print and public speaking channels.

Initiative: 2 (d) Support colleges, campuses and other areas' philanthropy efforts with consistent messages, templates, data and other useful content for funding proposals, web, and programs.

Initiative: 2 (e) Conduct needed market research related to the Capital Campaign to form themes, messaging, and web, video, print, and speech content delivery in order to achieve Capital Campaign fundraising goal. Conduct research with peer and aspirant Universities to assess communications and marketing resources and personnel support needed to successfully raise \$1 billion+ in a campaign.

Goal 3. The mission of the Carolina Alumni Association is to ensure that alumni are informed, involved and committed to the success of the University.

Initiative: 3 (a) Create a visible symbol of the vital role alumni play in the life of the institution by furthering plans for the Alumni Center. Continue to seek creative financing solutions and public/private partnerships.

Develop alternative *pro formae*/financing plans and evaluate each for its feasibility.

Initiative: 3 (b) Conduct Board-level strategic planning aimed at potentially "re-inventing" the Alumni Association in light of changed revenue expectations.

Examine all ongoing programs for ROO (return on objective). Re-focus effort in infrastructure to achieve maximum efficiencies and provide excellent customer service. Retaining members will be a critical objective for the foreseeable future.

Initiative: 3 (c) Develop key partnerships to maximize revenue from affinity relationships thereby insuring that critical programs and activities continue and grow.

Secure sponsorship agreements that generate significant underwriting revenue.

Initiative: 3 (d) Continue to refine and expand communications capabilities, including social networking strategies, to ensure two-way communications with alumni.

Continue to expand the capabilities of the website, e-communications and the Association's presence in social networking media. Continue to make these resources available to schools and colleges and other university units. Continue to provide significant support for the publication of *Carolinian* magazine.

Initiative: 3 (e) Increase membership in the Association to 38,000 and maintain member retention at least 69%.

Implement aggressive and cost-effective membership renewal strategies. Increase the number of life members from approximately 5,300 to 6,000. Increase the number of new graduate members from nearly 4,800 to 5,200.

Initiative: 3 (f) Expand the number and scope of alumni events both locally and in key geographic areas to increase visibility of the university and its programs and to increase interactions among alumni.

Define the “top 20” geographic areas in which alumni activity is most important and can be most beneficial to the alumni themselves and to the university. Develop a specific, campaign-long plan for activity in each of these strategic areas.

Initiative: 3 (g) Continue to provide direct financial support to outstanding incoming freshmen to encourage their enrollment.

Work to maximize the amount of financial support available for this purpose consistent with the mission and goals of the Association.

Initiative: 3 (h) Continue to develop key partnerships within the institution that will extend the reach and maximize the effectiveness of Association programs and activities.

Maximize partnership opportunities with the colleges and schools, intercollegiate athletics, student affairs and the university foundations to share resources and engage in joint programming.

II. Resources

Regarding financial resources: The University Advancement's Fall and Spring reviews provided by the Budget Office and the University Development and Alumni Relations Strategic Plan and Budget spreadsheet follow.

Unit Name and Number: 18

Responsibility - Advancement

A Fund Resources and Uses	Budget 10/31/2009	Actuals		Actuals 10/31/2008	Change from 10/31/2008	
		YTD 10/31/2009	% of Budget		Dollar Change	% Change
Resources:						
NOTE: 3's are BUDGET only						
General Fund Only (31000)	\$ -	\$ -		\$ -	\$ -	0.00%
State Appropriation (31500/31525)	\$ -	\$ -		\$ -	\$ -	0.00%
Budget Cut (31510)	\$ -	\$ -		\$ -	\$ -	0.00%
Carryforward (31533/31534)	\$ 2,285,832	\$ 2,285,832		\$ 1,842,224	\$ 443,608	24.10%
One Time within responsibility (36400/36500)	\$ -	\$ -		\$ -	\$ -	0.00%
One Time outside responsibility (363XX/368XX)	\$ 766,234	\$ 766,234		\$ 1,456,187	\$ (689,953)	-47.40%
Permanent within responsibility (37400/37500)	\$ -	\$ -		\$ -	\$ -	0.00%
Permanent outside responsibility (373XX/378XX)	\$ (176,709)	\$ (176,709)		\$ -	\$ (176,709)	0.00%
Subtotal 3's	\$ 2,875,357	\$ 2,875,357		\$ 3,298,411	\$ (423,054)	-12.80%
Tuition, Fee and Departmental Revenue (4000X)	\$ 170,817	\$ -	0.00%	\$ 2,216	\$ (2,216)	-100.00%
Net Transfers (excluding VCM - 81000/86000)	\$ 64,300	\$ 64,300	100.00%	\$ 352,766	\$ (288,466)	-81.80%
Total Resources	\$ 3,110,474	\$ 2,939,657	94.50%	\$ 3,653,393	\$ (713,736)	-19.50%
Preset Assessment (81150 & 81160)	\$ 7,414,741	\$ 2,471,580	33.30%	\$ 2,660,388	\$ (88,808)	-3.50%
Preset Assessment (86150 & 86160)	\$ -	\$ -	0.00%	\$ -	\$ -	0.00%
Net Resources	\$ 10,525,215	\$ 5,411,237	51.40%	\$ 6,213,781	\$ (802,544)	-12.90%
Uses:						
Personal Services - All (51000)	\$ 6,903,735	\$ 1,979,727	28.70%	\$ 2,188,875	\$ (209,148)	-9.60%
Fringe Benefits (54600)	\$ 1,825,232	\$ 540,008	29.60%	\$ 610,635	\$ (70,627)	-11.60%
Total Personal Services and Fringe	\$ 8,728,967	\$ 2,519,735	28.90%	\$ 2,799,510	\$ (279,775)	-10.00%
Expenditures (50000)	\$ 568,023	\$ -	0.00%	\$ -	\$ -	0.00%
Contractual Services (52000)	\$ 924,247	\$ 246,279	26.60%	\$ 266,663	\$ (20,384)	-7.60%
Supplies (53000)	\$ 263,359	\$ 75,303	28.60%	\$ 302,556	\$ (227,253)	-75.10%
Fixed Costs (54000) exc. Fringe	\$ 34,619	\$ 11,971	34.60%	\$ 15,856	\$ (3,885)	-24.50%
Contingency (55000)	\$ -	\$ -	0.00%	\$ -	\$ -	0.00%
Equipment/Books (56000)	\$ 6,000	\$ 7,759	129.30%	\$ -	\$ 7,759	0.00%
Renovations (57000)	\$ -	\$ -	0.00%	\$ -	\$ -	0.00%
Other Charges (59000)	\$ -	\$ -	0.00%	\$ 94	\$ (94)	-100.00%
IT's (60000)	\$ -	\$ (64)	0.00%	\$ (239,359)	\$ 239,295	-100.00%
Subtotal Other Uses	\$ 1,796,248	\$ 341,248	19.00%	\$ 345,810	\$ (4,562)	-1.30%
Total Uses	\$ 10,525,215	\$ 2,860,983	27.20%	\$ 3,145,320	\$ (284,337)	-9.00%
Balance	\$ -	\$ 2,550,254		\$ 3,068,461	\$ (518,207)	

Notes: The unit's budget was reduced by \$187,994 from the prior fiscal year for it's portion of State Appropriation base budget and FY09 cuts. The unit was held harmless for FY09 cuts after September 2008. The unit's carryforward decreased by \$689,953 or 47.40% from the prior year. The Special Events unit and Canteen Heath were moved from this unit to the President (Rsp 01). The unit's "A" Fund FTE positions have decreased by 11.38 positions. Part of this decline is due to the Special Events department moving to the President's unit (Rsp 01). The unit will split into the Development and Communications responsibility units later in this fiscal year.

Budget Analyst Name: Ralph B. Summer

Unit Contact: Charlie Appleby

Comments/Concerns:

Response:

With 33.33% complete, actual expenditures are 27.20% of budget. Equipment expenditures (56000) is at 129.30% of budget. The unit may need to realign their budget if spending patterns are expected to continue.

The majority of this overage is from equipment purchased for the Web Presence office and was unbudgeted. Adjustments will be made to the budget as we move through the year where necessary to account for these expenditures. This unit will be broken out as part of the new University Communications Unit in the near future.

A Fund Resources and Uses	Budget 2/28/2010	Actuals YTD 2/28/2010	% of Budget	Actuals 2/28/2009	Change from 2/28/2009	
					Dollar Change	% Change
NOTE: 3's are BUDGET only						
Resources:						
General Fund Only (31000)	\$ -	\$ -			\$ -	0.00%
State Appropriation (31500/31525)	\$ -	\$ -			\$ -	0.00%
Budget Cut (31510)	\$ -	\$ -			\$ -	0.00%
Carryforward (31533/31534)	\$ 2,285,832	\$ 2,285,832		\$ 1,842,224	\$ 443,608	24.10%
One Time within responsibility (36400/36500)	\$ -	\$ -			\$ -	0.00%
One Time outside responsibility (363XX/368XX)	\$ 1,260,334	\$ 1,260,334		\$ 1,560,090	\$ (299,756)	-19.20%
Permanent within responsibility (37400/37500)	\$ -	\$ -			\$ -	0.00%
Permanent outside responsibility (373XX/378XX)	\$ (20,809)	\$ (20,809)			\$ (20,809)	0.00%
Subtotal 3's	\$ 3,525,357	\$ 3,525,357		\$ 3,402,314	\$ 123,043	3.60%
Tuition, Fee and Departmental Revenue (4XXXX)	\$ 170,817	\$ 49,172	28.80%	\$ 125,304	\$ (76,182)	-60.80%
Net Transfers (excluding VCM - 81XXX/86XXX)	\$ 64,300	\$ 64,300	100.00%	\$ 352,766	\$ (288,466)	-81.80%
Total Resources	\$ 3,760,474	\$ 3,638,829	96.80%	\$ 3,880,384	\$ (241,555)	-6.20%
Preset Assessment (81150 & 81160)	\$ 7,414,741	\$ 4,943,160	66.70%	\$ 5,120,776	\$ (177,616)	-3.50%
Preset Assessment (86150 & 86160)	\$ -	\$ -	0.00%	\$ -	\$ -	0.00%
Net Resources	\$ 11,175,215	\$ 8,581,989	76.80%	\$ 9,001,160	\$ (419,171)	-4.70%
Uses:						
Personal Services - All (51XXX)	\$ 6,908,785	\$ 3,894,671	56.40%	\$ 4,371,882	\$ (477,211)	-10.90%
Fringe Benefits (546XX)	\$ 1,825,232	\$ 1,059,312	58.00%	\$ 1,205,426	\$ (146,104)	-12.10%
Total Personal Services and Fringe	\$ 8,728,967	\$ 4,953,983	56.80%	\$ 5,577,298	\$ (623,315)	-11.20%
Expenditures (50000)	\$ 1,218,023	\$ -	0.00%	\$ -	\$ -	0.00%
Contractual Services (52XXX)	\$ 924,247	\$ 512,981	55.50%	\$ 540,220	\$ (27,239)	-5.00%
Supplies (53XXX)	\$ 263,359	\$ 132,472	50.30%	\$ 538,825	\$ (406,353)	-75.40%
Fixed Costs (54XXX) exc. Fringe	\$ 34,619	\$ 18,568	53.60%	\$ 24,127	\$ (5,559)	-23.00%
Contingency (55XXX)	\$ -	\$ -	0.00%	\$ -	\$ -	0.00%
Equipment/Books (56XXX)	\$ 6,000	\$ 12,805	213.40%	\$ 12,805	\$ 12,805	0.00%
Renovations (57XXX)	\$ -	\$ -	0.00%	\$ -	\$ -	0.00%
Other Charges (59XXX)	\$ -	\$ -	0.00%	\$ 94	\$ (94)	-100.00%
IT's (60XXX)	\$ -	\$ (324)	0.00%	\$ (458,637)	\$ 458,313	-99.90%
Subtotal Other Uses	\$ 2,446,248	\$ 676,502	27.70%	\$ 644,629	\$ 31,873	4.90%
Total Uses	\$ 11,175,215	\$ 5,630,485	50.40%	\$ 6,221,927	\$ (591,442)	-9.50%
Balance	\$ -	\$ 2,951,504		\$ 2,779,233	\$ 172,271	

Notes: The unit's budget was reduced by \$187,994 from the prior fiscal year for it's portion of State Appropriation base budget and FY09 cuts. The unit was held harmless for FY09 cuts after September 2008. The unit's carryforward increased by \$443,608 or 24.10% from the prior year. The Special Events unit and Cantey Heath were moved from this unit to the President (Rsp 03). The unit received one-time funding of \$766,234 from Columbia units for development officers salary and fringe benefits. The unit received recurring funds of \$155,900 and one-time funding of \$494,100 from the Provost Office (Rsp 02) for the scholarship funds swap. The unit will split into the Development and Communications responsibility units in the next fiscal year.

Budget Analyst Name: Ralph B Sumner	Unit Contact: Charlie Appleby
Comments/Concerns:	Response:
With 66.67% complete, actual expenditures are 50.40% of budget. Equipment expenditures (56XXX) is at 213.40% of budget. The unit's budget is frozen until the new Communications responsibility unit is created. Without carryforward, the unit's expenditures are at 63.3% of budget indicating that another addition to carryforward is likely this year. The unit was held harmless for FY10 mid-year budget cuts to date, but can expect a budget reduction for FY11. The amount of unit cuts for the next fiscal year is unknown at this time.	1. We are 66.67% of the way through the fiscal year but have spend only 50.4% of our budget which is in line with our 3 year plan. The plan calls for \$1.5 million to be added incrementally (beginning in FY 2011) over the next 3 years. However, to maintain our current budget level we are depending on carry forward. 2. Equipment expenditures are over budget (even though the % is 213 it only represents about \$5,600) because a printer that was not budgeted was purchased by university publications. 3. The one time funding of \$494,100 from the Provost office was done in error and this amount will be transferred back out. 4. The \$155,900 in recurring funds from the Provost Office represents a "funds swap" to help the Provost Office with scholarship monies. University Development transferred \$155,900 of its Educational Foundation budget to the Provost Office

Development & Alumni Relations
FY Budget Projections
as of 3/31/10 (Note 1)

	FY 09-10	FY 10-11	FY 11-12	FY 12-13	FY 13-14	FY 14-15
Operating Expenses (Development) Note 3	914,000	814,000	814,000	814,000	814,000	814,000
Salaries and Fringes (Development) Note 2	4,772,530	5,356,092	5,356,092	5,356,092	5,356,092	5,356,092
Educational Foundation (\$750,000 - \$155,000)	595,000	595,000	595,000	595,000	595,000	595,000
R Funds	100,000	100,000	100,000	100,000	100,000	100,000
"A" funds to Alumni Relations	750,000	750,000	750,000	750,000	750,000	750,000
Total Expenses	7,131,530	7,615,092	7,615,092	7,615,092	7,615,092	7,615,092
"A" Fund allocation to Development	4,801,628	4,801,628	4,801,628	4,801,628	4,801,628	4,801,628
Funding from Colleges/Units (based on 50-50 split of senior DOD salary)	847,494	847,494	847,494	847,494	847,494	847,494
Educational Foundation (\$750,000 - \$155,000)	595,000	595,000	595,000	595,000	595,000	595,000
R Funds	100,000	100,000	100,000	100,000	100,000	100,000
New Monies from Tuition Increase		400,000	400,000	400,000	400,000	400,000
New Monies from Tuition Increase			400,000	400,000	400,000	400,000
New Monies from Tuition Increase				400,000	400,000	400,000
Carry forward	2,285,832	1,498,424	627,454	156,484	85,514	14,544
Total Revenue	7,184,954	8,242,546	7,771,576	7,700,606	7,629,636	7,558,666

Note 1 - These numbers do not include income and expenses for the Alumni Association, however the \$750,000 of A Funds that the Development Office is allocated that are transferred to the Alumni Association are included on line 13

Note 2 - Alumni Relations salaries are not included and therefore the additional monies that Alumni Relations gives to Development (varies between \$50,000 and \$170,000 yearly) is not included in revenue. The \$750,000 from Development A Funds and the revenue from Alumni Relations (\$50,000 to \$170,000) combine to offset the Alumni Relations salaries that are in unit 41000.

Note 3 - Adding \$100,000 for Web site fix

III. Departmental Assessment Plans and Results 2009-2010

Assessment plans from University Development, Carolina Alumni Association, and Advancement Administration follow.

Assessment Plan - University Development

Initiative: 1 (a) Raise \$110 million in production (gifts and new pledges).

Action Plans:

- Solicit gifts from alumni, parents, friends, corporations and foundations.
- Recruit and retain professional staff to maximize fundraising efforts.
- Communicate with and educate professional advisors and directors of development on planned giving through quarterly *Techniques* newsletter, seminars and targeted mailings.
- Identify three to five foundation prospects for each college/unit and solicit at least one for each college/unit.
- Meet with deans, faculty, and directors of development (DODs) who have relationships with key prospects to help craft fundraising strategy for Top 25 prospects of \$1,000,000 and above.
- Raise \$5 million via all annual giving vehicles: President's Society, Carolina Circle, Reunion Giving Program, and gifts and pledges secured through the Call Center.
- Increase Family Fund gifts through engagement with high level faculty/staff to encourage all levels of employees to participate.
- Increase volunteer involvement in fundraising at the school and college level.
- Hold training sessions for deans, vice presidents and DODs on various aspects of fundraising.
- Finalize campaign timetable and budget.

Indicators:

\$110 million raised (\$55 million raised as of 03/31/10).
Fill all open positions (in progress).
Seminars held and mailings to professional advisors completed (complete).
Raise \$10 million in planned gifts (\$9.9 million raised as of 03/31/10).
Three to five foundation prospects identified and solicited per college/unit (in progress).
Strategies developed for Top 25 \$1 million+ prospects (complete).
\$5 million raised through annual giving vehicles (in progress).
Family Fund participation increases to 37% (in progress).
Volunteers used in major solicitations (volunteers being utilized).
Training sessions held (complete).
Campaign timetable and budget approved (timetable established).

Assessment Plan - Carolina Alumni Association

Initiative: 2 (a) Create a visible symbol of the vital role alumni play in the life of the institution by furthering plans for the Alumni Center. Continue to secure private funds and to seek funding partnerships for the Alumni Center.

Action Plans:

- Continue to hold discussions with potential partners both within and without the University.
- Develop printed and other campaign support materials as above discussions dictate.
- Secure gifts for the Center, make at least two solicitations with the potential for a naming gift for the Center.

Indicators:

- Gifts and pledges will total \$6 million by fiscal year end.

Results/Use of Results Effective April 2010:

Additional gifts/pledges totaling \$250,000 have been received so far this year. Economic disruptions and changes in the vision for this project have resulted in a redefinition. Discussions are underway toward a new financing model.

Initiative: 2 (b) Conduct Board-level strategic planning aimed at potentially “re-inventing” the Alumni Association in light of changed revenue expectations.

Action Plans:

Meet with the Executive Committee and all other Board members who choose to participate in structured, facilitated session to review mission, goals, objectives, core values and needs.

Indicators:

The Board has postponed this action until fall of 2010.

Results/Use of Results Effective April 2010:

The resulting plan will be used to shape the Association and its programs for the next several years. The results may cause this plan to be re-evaluated.

Initiative: 2 (c) Continue “Join Up” campaign, seeking 40,000 total members by December 31, 2010. Increase retention of annual members from 65 to 70 percent.

Action Plans:

- Incorporate JOIN UP campaign into electronic and printed communications; create JOIN UP page on CAA Web site; create unique links to measure effectiveness and response rate to communications; incorporate JOIN UP campaigns in call-to-action ads, replacing advertisements for MyCarolina campaign.
- Develop and incorporate systems and processes to more precisely track results of renewal and solicitation campaigns.

Indicators:

Identification and tracking of measurable parameters that positively impact our decision-making capabilities and audience targeting; measureable results in membership as well as evaluation of visits to Web site.

Results/Use of Results Effective April 2010:

Memberships recently acquired for new graduates are expected to bring membership numbers to 35,000 by fiscal year end. The retention rate will not be recalculated until that time.

Initiative: 2 (d) Continue to seek ways to engage in partnership with Development to reinforce the institution’s fund raising objectives and to stress philanthropy in all Association activities and programs.

Action Plans:

- Use member-donor research to identify and target groups and develop strategies for member and donor recruitment.
- Work through the geographically diverse alumni club network to raise awareness of the University’s fund raising goals and to create a receptive and informed alumni constituency; this may include specific alumni events or meetings as well as targeted communications.
- Continue to develop the national young alumni group to assist in engaging younger alumni and stressing philanthropy.
- Continue to seek reunion class and senior class gifts.

- Continue to seek gifts for the Association's priorities including scholarships and the Alumni Center.

Indicators:

The goal is to convert non-donor members to donors (by 5%) and non-member donors to members (by 10%), resulting in substantially increased membership and gift revenue.

Results/Use of Results Effective April 2010:

Statistics have not yet been generated for this year, but all planned activities have been undertaken. New statistics on members and donors will guide the 2010-2011 plan.

Initiative: 2 (e) Maximize partnership opportunities with vendors and affinity relationships to increase resources available for association priorities.

Action Plans:

- Cultivate and support existing affinity relationship.
- Investigate new opportunities for vendor and affinity relationship.
- Increase local business activity in sponsorships and partnerships to attract non-members in the Midlands and ensure more benefits for alumni of different demographics.
- Ensure that advertisers are secured for all issues of *Carolinian*.
- Secure sufficient sponsorship revenue to trade for services to underwrite at least 25% of program expense.
- Implement a corporate membership program.
- Continuously evaluate vendor relationship for marketing and communication effectiveness.

Indicators:

- Revenue will be maintained at current levels or increased.
- Vendor costs will be reduced.

Results/Use of Results Effective April 2010:

In January 2010, the Association lost its most lucrative affinity partnership when, as a result of the calamitous banking changes, Chase declined to renew any of its contracts with Alumni Associations across the country. We are aggressively seeking alternative sources of revenue, and discussions continue

with the remaining financial institutions engaged in this kind of affinity program.

Initiative: 2 (f) Continue to work with Student Affairs to enhance the student experience and assist in student recruitment and retention.

Action Plans:

- Continue to maintain and grow the student membership program, providing value to students throughout their years at Carolina.
- Continue to sponsor the Garnet Circle Student Alumni Council and the Alumni Scholars Association to promote leadership and alumni networking opportunities among these talented students.
- Continue to work with Admissions to provide scholarships to gifted students as a recruitment tool and to enlist alumni in the Alumni Recruitment Network; this network extends the reach of the Admissions Office to many schools and locales across the country at virtually no cost to the institution.
- Continue to coordinate the Senior Connection, providing benefits to seniors and assisting them in preparing for graduation.
- Continue to partner with the Registrar and Barnes & Noble to participate in Grad Fare and to offer discounted Association memberships to the purchasers of caps and gowns.
- Continue to offer the Senior Party, a celebration for graduating seniors that showcases many of the University's services for new graduates.
- Continue to operate the Carolina Kids Program, engaging the children of alumni prior to decision-making about college.

Indicators:

Participation in all above activities shall be maintained or increased.

Results/Use of Results Effective April 2010:

Given the need to maximize tuition revenues we are seeking to re-craft the criteria by which we will continue to evaluate this partnership. The Association has continued or initiated all the activities called for in this plan. In addition we held 13 Freshman Send-Off events around the country that are much valued by our colleagues in Student Affairs.

Initiative: 2 (g) Increase the power and effectiveness of communications to ensure all alumni are treated as insiders and shareholders in the enterprise.

Action Plans:

- Continue to work with schools and colleges in cross-promotion on web sites.

- Continue to reach out to schools and colleges and other campuses to assist with distribution of e-blasts including monthly and quarterly e-newsletters, holiday e-cards and special event notices.
- Work with University entities to assist in dissemination of important news about the institution to all alumni.
- Explore new advertising opportunities.
- Launch CAA e-store.

Indicators:

Measure feedback, membership numbers, click through and open rates for above actions.

Results/Use of Results Effective April 2010:

- The Website has been vastly improved thanks to a new vendor.
- We now personalize all e-communications to the recipient.
- We are providing “e-blast” services to colleges and schools. We are now visible on Facebook and Twitter.
- The Executive Director’s blog is now available.
- We regularly distribute communications on behalf of the President and are able to measure open and click-through rates on all such communications.

Initiative: 2 (h) Continue to provide engaging programs for alumni that educate, offer social networking and provide avenues to support the University. Using the regional resources of the Association, work to prepare for a major fund raising campaign by heightening awareness of, and interest in, the University.

Action Plans:

- Work with University Development and Schools and Colleges to identify strategic locations for alumni activity.
- Enlist alumni club leaders and other regional volunteers in creating events to showcase University accomplishments and objectives.
- Conduct a series of regional meetings, events and activities.

Indicators:

Over the next several years, well-attended events will have been held in each of the strategically identified locales. Conduct pre-and post-event surveys to measure interest in, and knowledge of and support for University initiatives in key areas.

Results/Use of Results Effective April 2010:

- We have added a Charleston event modeled after the President's Reception in Columbia to the schedule for this year. Local alumni have solicited sponsorships to make the event almost self-supporting.
- Send-Off events for incoming freshmen were held in 13 areas, 9 of which are on the list of most strategic locales. These events bring together parents, siblings, alumni and new and current students in an atmosphere that reflects the close and caring nature of Carolina.
- Other alumni events were held in Myrtle Beach, Atlanta, Chicago, Georgetown, Charlotte, New York, Washington, DC, Nashville, Birmingham, AL, Tampa, Raleigh, Dallas, Little Rock, San Francisco, Los Angeles, Statesville, NC, and many other locales.

Assessment Plan – Advancement Administration

Initiative: 3 (a) Transfer data housed in external databases into Millennium.

Action Plans:

- Assess data housed in Raiser’s Edge for the Upstate campus.
- Assess data housed in the USC School of Medicine’s Access database.
- Assess data housed in the Carolina Alumni Association’s Access database.
- Prepare and implement a crosswalk of identified data elements to convert.
- Develop financial and biographical standard reports.
- Complete the data conversion process.
- Train staff to enter financial and biographical transactions directly into Millennium.

Results/Use of Results:

Analysis of data elements completed. Crosswalk documents are developed and approved by data stewards. Business rules are fully documented and reporting formats developed. Staff is trained according to gift processing and data entry standards.

Initiative: 3 (b) Update Millennium software to provide staff with the latest functionality.

Action Plans:

- Upgrade Millennium to version 7.8.
- Develop Phase II of Visual Analyzer.
- Conduct feasibility study to determine if a virtual server environment is viable.
- Evaluate security permission groups.
- Test all existing exports (i.e. Financial Edge, Lutz, Salesforce, Payroll).
- Test all credit card processes.
- Develop new training materials.
- Conduct training sessions to inform employees of all new enhancements.

Results/Use of Results:

Millennium version 7.8 successfully tested and installed. All exports to external sources are functioning properly. Graphs are developed in Visual Analyzer to track all campaign statistics.

Initiative: 3 (c) Improve communication with University donors, particularly Horseshoe Society members, to increase involvement and commitment.

Action Plans:

- Implement campus-wide visual recognition plan for major donors and gift naming opportunities on the Columbia campus.
- Develop list of donors for invitations to athletic events with the President, both at home and away; issue invitations and support such events.
- Investigate President hosting Horseshoe Society event during the fall of 2010; coordinate activities with Special Events.
- Continue to utilize Publications and University Web site to showcase individual donors.
- Recognize new members of the Horseshoe Society throughout the year.
- Utilize letters and e-mails to communicate with donors.
- Continue to improve accuracy of endowment/scholarship reporting.
- Organize President's development travel.

Indicators:

Visual donor recognition policy has been established and will be monitored by the Office of Donor Relations.

Guests attending all athletic events are documented in Millennium.

Horseshoe Society event to be held in fall 2010 if funding permits.

Work with Larry Di Giovanni on submission of donor stories to Publications for the *Carolinian* as well as for consideration on our Web site.

New members and level changes notified on a quarterly basis through letter from President; member status updated on Millennium and constituent Directors of Development also notified.

Yearly letter or e-mails from the President or First Lady updating donors on happenings at the University.

Annual endowment reports for 2008-2009 were mailed in December 2009. Added 141 new Account Contacts in Millennium for Aiken Partnership endowed funds.

Organized twenty-four presidential visits with donor(s).

Results:

The implementation of a campus-wide visual recognition plan for major donors and gift naming opportunities on the Columbia campus was completed and implementation has begun with several units – Athletics, Libraries and the Arnold School. The donor recognition plaques were installed in the Arnold School of Public Health, The Dodie Anderson Academic Enrichment Center, and the new dance hall. Installation of donor recognition plaques in the new Hollings Library will be completed in May 2010.

During the 2009 football season, invitations to the donors to sit with the President in his box and bay were much more strategically planned. The number of million dollar plus donors was 23. For the seven home games, all 14 seats in the President's Box and 22 seats in the President's Bay were filled.

For the 2009-2010 men's basketball season, the President was scheduled to attend nine of the sixteen home games. A total of 132 donors and their guests were in attendance for these games – 8 of which were million dollar plus donors.

For the 2009-2010 women's basketball season, Donor Relations received tickets to all 12 women's home games. Tickets were used for 6 of these games. 36 individuals from Still Hopes Episcopal Retirement Community residents attended one game. Still Hopes has over 55 alumni in residence. The College of Nursing hosted 22 guests and the Law School hosted 19 guests.

Plans for an annual Horseshoe Society luncheon are being revisited. In lieu of an annual luncheon, a recommendation has been made to honor the Horseshoe Society members with the creation of a scholarship fund. A fall reception is being proposed in lieu of a spring luncheon. The announcement of the scholarship would also serve as a Save the Date card. The card would be created through a competition conducted by the College of Arts and Science. The designer of the card will be introduced at the reception along with other students who submitted their designs. (Idea: possibly hold reception at McMaster and enjoy art exhibits or have student art work at the house)

155 RSVPs were received for the May 9, 2009 Horseshoe Society luncheon of which 132 were Horseshoe Society members; 123 was the final head count.

Alumni Association to include members of the Horseshoe Society in their mailing list for the *Carolinian* publication.

Provided information for University website updates. Worked with Publications to create Donor Relations web presence on Development website; links to endowment report, endowed chair recipients, scholarship thank you letters, etc. Included Endowment Report information on the Educational Foundation website. Created a link to spotlight endowed chairs and professors.

Horseshoe Society members have been included in the flash e-mails sent out by Annual Giving. This past year, members received the Carolina-Clemson Challenge e-solicitation and most recent stewardship video.

New members and level changes in the Horseshoe Society are recognized on an ongoing basis. Since July 1, 2009, 29 welcome letters from the President have been mailed (45 letters the previous year when we began counting Gamecock Club and all gifts); 17 new members: 15 Lieber, 1 Pinckney and 1 Rutledge. In addition, there were 13 level changes: 4 Pinckney, 6 DeSaussure and 3 Rutledge.

Worked with Colleges to clean up old funds that will never reach their endowed level. Worked with the Controller's Office on University endowments so they may be tracked and reported on through Millennium.

1,209 Annual Endowment Reports were mailed in December 2009. 949 letters were generated for the Columbia campus along with a total of 1,209 account sheets. 69 account sheets were created for Aiken along with 65 accounts sheets for Sumter. A total of 1,343 account sheets were generated in comparison to 1,275 the previous year indicating a 5.3% increase.

Worked with the Educational Foundation, Office of Financial Aid, and Provost's Office for endowed funds and scholarships handled through the Educational Foundation. Worked with the Controller's office for endowed University funds and scholarships. Worked with Financial Aid to incorporate student thank you letter requests on applications and award letters. Worked with the Financial Aid Office to add informational link for scholarship recipients.

Coordinated, arranged and planned 24 development trips for the President. The President met with 110 donors during these trips.

110 major donors in New York, Atlanta, Florida, Texas, Virginia, California and other areas of the country were visited by the President.