

ARCH FOUNDATION STRATEGIC PLAN 2007

INTRODUCTION

The Arch Foundation for the University of Georgia, Inc. (Arch Foundation) was incorporated on May 3, 2005 and has served as the cooperative organization receiving gifts for the University since July 1, 2005. The Arch Foundation's stated purpose and mission is to:

“provide support to teaching, research and public service and outreach programs for the University of Georgia by means of volunteer leadership and assistance in development and fundraising activities; fiduciary care for assets of the Foundation for the long-term benefit and enhancement of the University; and the provision of broad advice, consultation and support to the President of the University.”

To comply with the Board of Regents' requirements for cooperative organizations and to effectively accomplish the Arch Foundation's mission, it is appropriate that the Arch Foundation's Board of Trustees (Board) develop and adopt a strategic plan that is consistent with the University's strategic goals. The strategic plan should emphasize the following points: ensure Arch Foundation funds are being managed and used as effectively as possible; maximize the Arch Foundation's opportunities to help grow the University's endowment; and enhance communication between the Arch Foundation, the President of the University, and all constituencies in a position to provide financial resources to UGA.

OUR STRATEGIC GOALS

In order to accomplish its primary mission of supporting the University of Georgia, the Arch Foundation sets the following strategic goals.

I. Fundraising/Endowment Growth

The Board must cultivate an environment that will help grow the University's endowment to a level commensurate with its status as one of America's premier public universities. This can be accomplished by: evaluating with the University the effectiveness of current advancement efforts; exploring new fundraising options with the University; and implementing new outreach initiatives in coordination with the University's external affairs team.

- A. Transformational Giving – The Board should actively assist the University in increasing the level of transformational gifts, especially in the role of identifying viable prospects. This level of private giving will help the University increase its margin of excellence.

- B. Unrestricted Giving – The Board, in consultation with the University, should set specific goals to increase the level of unrestricted funds available to address critical University needs.
- C. Unrestricted Endowment Component - The Board, in consultation with the University, should increase the Arch Foundation’s pool of unrestricted discretionary funds by encouraging donors who establish endowments to agree to include an unrestricted funding component.
- D. Donor Identification – The Board, through formal screenings, focus sessions, and through on-going personal encounters, should help identify prospects, including alumni, non-alumni, corporations, foundations and other organizations.
- E. University Academic Initiatives – The Board must ensure that Arch Foundation funds are used in direct alignment with donor intent and the academic initiatives established by the University.
- F. Arch Professorships – The Board, in consultation with the University, should make additional funding for faculty retention and recruitment a priority issue through the Board’s Arch Professorships initiative.
- G. Solicitation Calls – The Board should actively participate in opening doors to high-level prospects and in solicitation visits as appropriate, all in coordination with the Office of the Senior Vice President for External Affairs.
- H. Stewardship Calls – In consultation with the University, the Board should contact key donors periodically throughout the year to reassure them that their efforts have not gone unnoticed or unappreciated.

II. Board Development

It is imperative that the Board take a more active role in recruiting and developing its members.

- A. Set Expectation of Individual Board Member Giving – Board members should show their level of dedication to the fundraising effort by giving to the Arch Foundation commensurate with his/her financial means, taking into consideration the importance of unrestricted support and Arch Professorships.
- B. Recruit Members Who Can Help Accomplish the Primary Goal of Fundraising – The Board should seek out and recruit individuals who have a track record of fundraising or philanthropy and/or who have ties to individuals who have the ability to make or generate sizable donations.

- C. Improve Diversity of Board – When recruiting new members, the Board should endeavor to select individuals from diverse backgrounds to bring a broad range of perspectives, experience and skill to the Board.
- D. Develop Board Member Work Plan – Members should develop individual work plans to guide their activities in support of the Foundation and the University each year. The plans should be based upon guidance from the University as to particular areas of need.
- E. Increase Desirability and Effectiveness of being a Board Member – The Board should elevate the quality of the experience of its members by: increasing their input regarding the Arch Foundation; increasing their visibility among the University and donors; and encouraging them to become more involved in University activities.
- F. Build Knowledge About the University – Members should stay abreast of University priorities, needs and special initiatives so as to serve as strong ambassadors and advocates for the University.
- G. Provide Fiduciary Care for Assets – The Board should follow “best practices” in all areas of foundation management in order to ensure the long-term enhancement of the University and the Foundation’s assets.

III. Public Advocacy

The Board should promote the University and the Arch Foundation by providing assistance in developing productive messaging and positioning for enhancing fundraising and UGA’s image and relationships with key constituencies. The Board should become involved by attending and participating in University sponsored activities and events.

- A. Enhance University and Arch Foundation Image – The Board should work with the Public Affairs staff to help provide cohesive and creative branding, marketing and communications strategies – all critical to successful fund raising – by distinguishing UGA as a worthy recipient of public and private financial resources.
- B. Work with University Departments and Colleges to Stay Involved – The Board should encourage each member to reconnect and work with his/her former college departments and schools.
- C. Participate in University Programs (Campaign Events, etc.) – The Board should reinforce the significance of University events by attending and participating whenever possible.

- D. Participate in General Alumni Programs – The Board should reinforce the significance of general alumni programs and events through attendance and participation whenever possible.
- E. Recruit Students – The Board should ensure funds are available to attract the best and brightest students and actively assist in recruiting efforts.
- F. Encourage Employment of Students – The Board should be an advocate for employing UGA interns and hiring UGA graduates.
- G. Outreach Events – The Board should raise awareness regarding the University and the Arch Foundation through outreach events to help cultivate new donors and supporters of the University.

IV. Outreach and Counsel as requested by University President

A major component of the Arch Foundation's mission and purpose is to “*provide... the provision of broad advice, consultation and support to the President of the University.*”

- A. Advise and Consult - The Board should make itself available to assist and advise the President of the University as needed or requested.

V. Work with other Supporting Organizations

The Board should work cooperatively with the UGA Alumni Association and other organizations that support the mission and goals of the University.