

Comprehensive Fundraising Plan for Cheyney University



**Office of Institutional Advancement
2009 - 2012**



June 2009



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I. Introduction

This Comprehensive Fundraising Plan for the period 2009-2012 provides an overview of fundraising goals and objectives for the Office of Institutional Advancement and Cheyney University, and it is tied to the University's strategic goals and objectives. The third strategic goal of the University is to **manage and secure fiscal resources and facilities needed to enhance institutional effectiveness**. Therefore, fundraising goals are an outgrowth of CU's strategic goals and priority needs.

This plan also provides a framework for more effective, collaborative and synergetic approach to institutional advancement that invites the meaningful engagement of Cheyney University's various constituent groups including alumni, legislators, State System of Higher Education, foundations, and other private donors. Specifically, this plan identifies a critical need to build a wider and more active "community of interest" that is actively involved in a coordinated effort to advance Cheyney University during this depressed national economy and in an increasing competitive fundraising environment.

This Comprehensive Fundraising Plan (June, 2009) is offered as a "point of departure" document that invites the inputs and critical feedback of the campus community including the Council of Trustees (COT), administration, faculty, and alumni. Also, external supporters and shareholders will be consulted with the view of developing a living plan that is updated regularly. Thus, it is assumed that this plan is a working document that can be easily modified and adapted based on subsequent inputs, shifting environmental assumptions and evolving needs and interests. This plan will also be expanded as viable fundraising prospects are targeted by the Office of the President, the OIA staff and various advisory groups that will be formed and mobilized to promote the University's strategic goals and objectives.

Organization of this Fundraising Plan

Sections II provides important context and a strategic framework for the fundraising goals articulated in this plan. Section IV provides an overview of specific, measureable fundraising goals for the three year period, 2009-2012. These goals are inextricably linked with the CU's academic plan and the University's strategic goals and priorities. Section III presents baseline data from the past two years and provides an analysis of support to CU from various constituent groups. In turn, Sections V and VI shift attention to specific fundraising strategies and discuss critical success factors that will guide CU's fundraising efforts over the next three years. Sections VII-IX delineates specific strategies and activities for achieving those fundraising goals, with particular relevance to alumni relations, government relations and public relations. Implicit in these sections is the compelling need to provide additional advancement resources and implement practical measures that render these goals realistic and attainable.

Section X summarizes the plan and notes that the fundraising challenges ahead absolutely require a decided commitment to continually review and execute this plan while allotting the necessary resources that will determine its relative success.

II. A New Strategic Framework for Institutional Advancement: Critical Success Factors

This Comprehensive Fundraising Plan is best viewed in the context of Cheyney University's current position in the educational marketplace and its critical need to garner increased private sector and government resources. Throughout most of its rich history, Cheyney University has nurtured a well-earned reputation as the nation's first HBCU and a premier teacher training institution. However, contemporary realities must be confronted head-on, if CU is to achieve fiscal strength and sustained growth in the years ahead. Furthermore, confronting the University's current image is a means of supporting the overall strategic goals and objectives of the institution.

Advancement must be approached by an expanded community of interest that demonstrates effective levels of communication and collaboration. Next, there must be a commitment to change and a new approach to achieving fundraising goals and objectives based on proven "best practices." Finally, Cheyney University must embrace a less insular position and link its academic quality and services with specific educational and economic needs of the southeastern area of the Commonwealth and the broader tri-state Delaware Valley region. This can best be achieved through forging enduring strategic partnerships based on mutuality of purpose and overlapping interests.¹

Critical Success Factors

The pursuit of Cheyney University's fundraising goals is best viewed and approached in the context of specific "critical success factors" that grow out of a careful analysis of fundraising results over the past two years, FY 2007-08 and FY 2008-09 and an awareness of a nationwide decrease in private sector support for higher education. In brief, corporate and foundation giving is declining. Thus during the current economic slump, colleges and universities would be well-advised to compensate for these declines by focusing on support from individuals of wealth, selected foundations and new governmental funding opportunities.

Moreover, this fundraising plan also takes note of the important need for a fundamental paradigm shift predicated on those six critical success factors. The paradigm shift should produce results that will provide funds to strengthen academic quality and excellence in specific programs such as the Call Me MISTER Program and the develop of the Center of Excellence in Communication Arts, Fine Arts, and Entertainment Arts.

- A. Implementation of an Integrated and Expanded Annual Fund Program
- B. A Concerted Emphasis on Major Gift Acquisitions (e.g., gifts of \$25,000 and above)
- C. Re-Organization of the Office of Institutional Advancement
- D. Collaborating with the Cheyney Foundation to Revitalize Their Infrastructure.

¹ See 2009 concept paper, The Transformation of Cheyney University: Laying the Foundation for Institutional Renewal and Sustainable Growth.

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- E. Re-Investment in Support of Vital Institutional Advancement Functions
 - F. Forging a Integrated Community of Interest
- See Section VI for a detailed discussion of each.

III. Baseline Assessment and Analysis Baseline Assessment: The Impetus for Change and Re-Direction

The compelling need to improve Cheyney University’s overall approach to institutional advancement has been well-documented by various external consultants and fundraising professionals*. Most recently, the need and impetus for change is demonstrated in an analysis of fundraising results of the past two years, FY 2007 and FY 2008.

Analysis

These results reflect the fundraising goals for FY 2007-08 and 2008-09 have been met and exceeded. However, a closer analysis is warranted, particularly in the area of private sector giving. (See next page.)

Category	Goals 2007-2008	Actual 2007-2008	Year to date 2008-2009	Goals 2008-2009	'09 - YTD vs. Goal in \$ + (-)	'09 – YTD vs. Goal Actual in % + (-)
Council of Trustees	n/a	\$3,950	\$3,350	\$5,000	-1,650	67.00%
Alumni	\$ 125,000	\$157,532	\$130,136	\$172,000	-41,864	75.66%
Organizations/Churches	\$75,000	\$73,581	\$44,191**	\$80,000	-35,809	55.24%
Bequest Expectancies/Deferred Gifts	\$275,000	\$230,427	\$490,000	\$250,000	240,000	196.00%
Corporations/Foundations	\$400,000	\$632,649	*\$235,400	\$700,000	-464,600	33.63%
Faculty/Staff	\$35,000	\$13,786	\$11,051	\$15,000	-3,949	73.67%
Individuals	n/a	\$14,095	\$39,670	\$28,000	11,670	141.68%
Vendors	n/a	\$5,750	\$10,000	\$10,000	0	100.00%
Government Grants (Please see Notes)	\$4,458,000	\$4,926,643	\$7,476,982	\$6,358,000	1,118,982	117.60%
Total	\$5,368,000	\$6,058,413	\$8,440,780	\$7,618,000	822,780	110.80%

Private Funds Total - \$ 963,798 Public Funds Total - \$7,476,982 Year to date is as of 6/5/2009.

*Includes \$82,500 from Friends Fiduciary Corporation expected before the end of FY '09.

**Includes \$34,091 from Family Planning Council expected before the end of FY '09.

NOTES:

Government Grants now include the combined Actual, Year To Date and Goal amounts for Sponsored Programs (SP) and Economic & Workforce Development (EWD).For example, see report of the Commission on the Continued Vitality of Cheyney University (1993) and a professional audit of the Institutional Advancement in the OCR Partnership Agreement, (1998).

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**Private Sector Giving to Cheyney University
(By Constituent Group)
A Two Year Comparison**

Constituent Groups	2007-2008			2008-2009				
	Actual	Number of Donors	Average Gift	YTD Actual	Number of Donors	Average Gift	\$ Change	% change
Council of Trustees	\$3,950	5	\$790	\$3,350	4	\$837	(\$600)	-15.19%
Alumni	157,532	447	352	130,136	404	\$322	-27,396	-17.39%
Organizations/Churches	73,581	10	7,383	44,191	12	\$3,682	-29,390	-39.94%
Bequest Expectancies/Deferred Gifts	230,427	2	115,213	490,000	2	\$245,000	259,573	112.65%
Corporations/Foundations	632,649	15	42,160	235,400	12	\$19,616	-397,249	-62.79%
Faculty/Staff	13,786	43	341	11,051	33	\$335	-2,735	-19.84%
Individuals	14,095	36	421	39,670	47	\$844	25,575	181.45%
Vendors	5,750	3	1,916	10,000	2	5,000	4,250	73.91%
TOTALS	\$1,131,770	561		\$963,798	516		\$170,150	-15.03%

Salient Findings

This two-year comparison indicates an overall need to increase both the size and number of private sector gifts across all constituent groups. The number of gifts in 2007-2008 and 2008-2009 is 561 and 516 respectively. Also, while there are only two bequests and deferred gifts received in each of the past two years, they amounted to a significant portion of total dollars from individuals. In summary, these data clearly suggest that an emphasis on major gift acquisition is warranted. Moreover, a focus on bequests and deferred gifts is advisable particularly when outright giving decreases in a struggling national economy. The practical implications for these recent developments are discussed in fuller detail in Sections V-VI that delineate how the major gift imperative can be addressed in order to meet Cheyney University's strategic goals and fundraising goals and objectives over the next three years.

IV. Fundraising Goals and Objectives for 2009-2012

A. Overview and Needs Assessment

Fundraising goals and objectives for the Office of Institutional Advancement emanate from Cheyney University's strategic goals and directions and are linked to CU's Academic Plan (March, 2009). In addition, Cheyney University has developed a campus-wide master plan that articulates capital projects (i.e., new construction and renovation projects) that are either underway or in the planning phase. This master plan will be updated soon.

Employing the University's Strategic Plan and Academic Plans as filters, institutional priorities fall into five basic categories of need.

- 1) **Operating Funds** – unrestricted dollars that supplement revenues derived from state appropriations, tuition and fees, etc.
- 2) **Capital Projects** – restricted funds to support new construction and major renovations. These funds are needed to address various unmet projected costs.
- 3) **Scholarship Funds** – endowed and non-endowed funds to attract and retain academically worthy and financial needy students.
- 4) **Support for two proposed Centers of Excellence in the areas of:**
 - Communications Media, Fine Arts, and Entertainment Arts
 - Natural and Applied Sciences
- 5) **Support for Signature Academic Programs and Evolving Initiatives include, but are not limited to:**
 - The Keystone Honors Academy

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- The “Call Me Mister” Program
- The development of centers of excellence
- A Revitalized Teacher Education Program
- Expanded programming at CU’s urban site focusing on the needs of adult learners and non-traditional students who seek the baccalaureate degree and/or career development and “re-tooling” programs leading to gainful employment.
- Athletics

These five categories of need are briefly discussed below with reference to specific resource (fundraising) needs over the next three years, 2009-2012

1. Operating Funds – It is clear from the Financial Plan that unrestricted funding to support the operational needs of CU must be increased (see recent two year comparison, (p. 6) in light of declining state appropriations. Moreover, in order to support the University’s strategic goals and objectives, this funding is definitely needed to strengthen academic quality and excellence—and support the development of the centers of excellence. The challenge, however, is that donor preference favors hands-on, rather than unrestricted, giving. Yet, a goal of \$500,000 for unrestricted operating funds could be derived from unrestricted private gifts and from indirect cost income from grants. The more academic quality is enhanced, the easier it will be to raise these funds. Sources for these funds include grants, earmarks, and foundations. Cheyney University has already hired a part-time consultant to assist with researching opportunities from foundation and grant funds that could be viewed as capacity building funds for institutions pursuing specific strategic goals and objectives. Further, Cheyney University alumni have several small alumni campaigns including raising funds for unrestricted operating costs. Alumni are also a potential source for obtaining unrestricted operating costs.

Projected Need: \$500,000

2. Capital Projects – The Marion Anderson Music Center has been renovated and Humphreys Hall will soon be renovated. Both require funds for furniture, fixtures and equipment. When fully equipped and operational, these two buildings will strengthen academic quality and excellence and advance student achievement and success—two strategic goals of the University. Humphreys Hall will serve as a living/learning community for Humphreys Scholars and the Marian Anderson Music Center will help to spur the development of the Center of Excellence in Communications, Media Arts, Fine Art, and Entertainment Arts. A grant writer has been obtained to seek funds for the additional dollars needed to bring “Steinway facility” status to the Marian Anderson Music Center.

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Humphreys Hall -	\$1,400,000
Marian Anderson Music Center -	\$ 500,000

Combined Projected Need: \$1,900,000

3. Scholarship Funds – Cheyney University has maintained its legacy of access, opportunity, and excellence. However, many talented students do not attend college still because of lack of funds to meet the unmet gap between financial aid and the cost of attending college. Increasing the University’s ability and capacity to gather scholarship dollars will advance student achievement and success and allow the University to enhance its institutional effectiveness—strategic goals for Cheyney University. Increased scholarship funds will allow the University to attract and retain more talented and deserving students. State appropriations to Cheyney University are enrollment driven i.e., based on two-year relative growth cycles. Thus, the increased provision of these scholarship funds takes on major significance in advancing the University’s strategic goals and objectives. One alumni chapter has already raised \$53,000 for unrestricted scholarships. An alumni campaign to raise \$1 million dollars has already begun and eagerly embraced by some alumni, but needs to be continuously stressed.

Projected Needed Outcome- \$1,000,000

4. Support for Proposed Centers of Excellence

Center of Excellence in Communications Media, Fine Arts, and
Entertainment Arts (Phase II Implementation)

The University expects to host an open house in the 2010-2011 academic year to highlight its renovated television studio, graphic design studio, radio station, and related areas. This open house should generate more interest in fundraising for the Center of Excellence in Communication, Fine Arts, and Entertainment Arts. Moreover, the Ed Bradley Gala that will be hosted in the Marian Anderson Music Center in October 2010 will also present an opportunity for showcasing the faculty, their art, and their potential for developing students who are talented for the region. These efforts support strategic plan goals strengthen academic quality and excellence and should generate interest and contributions.

Projected Phase II Needs \$800,000

Center of Excellence in Natural and Applied Sciences

In addition to the development of a center of excellence in Communications Media, Fine Arts, and Entertainment Arts, the faculty has demonstrated an interest in developing a

Center of Excellence in Natural and Applied Sciences. The development of this center goes at an appropriate time since in the 2011-2012 year, the University will begin building another science building. Thus, there are naming opportunities that can yield from \$1 million to \$2 million dollars.

Project Funds that Could Be Raised: \$800,000 in FY2009-2011

Combined Project Possibilities \$1,600,000

5. Support for Signature Programs

The Keystone Honors Academy: This program is primarily supported by state appropriations. An additional \$1,000,000 over the course of the next three years is needed. Participants in this program boast a graduation rate of 82%, well above the national average. The Keystone Honors students excel and many continue to graduate schools. These students represent Cheyney University well. Further, supporting this program by more contributions supports the strategic goal advancing student achievement and success.

Projected Funds Needed: \$1,000,000

The Call Me MISTER Program²: This outstanding teaching training program is in need of continuation funding in 2009-12. An additional \$1,000,000 over the course of the next two years is needed. Because of the success of this program, several foundations have already expressed an interest. A grant writer has been hired to write specific grants for funding this program. This program supports the teacher education legacy of Cheyney University, it responds to the need for a diverse core of urban teachers, and it has attracted some influential supporters such as Dr. Bill Cosby. The October 2010 gala honoring Ed Bradley was designed to raise funds for the Call Me MISTER Program. It is projected that approximately \$150,000 will be raised from the gala, but the gala should generate good will and raise the awareness of the Call Me MISTER program to accommodate the projected need of \$1,000,000 over two years.

Projected Requirement \$1,000,000

Combined Signature Programs Funds Needed \$2,000,000

² The "Call Me MISTER" (Mentors Instructing Students Through Effective Role-Modeling) teacher program for minority males is an innovative and progressive approach that effectively produces highly qualified teachers to not only effect change in classrooms but communities alike. The "Call Me MISTER" program has created a component for females that addresses the lack of minority women in the field of STEM (Science, Technology, Mathematics and Science). With these programs, Cheyney University will again make its mark in the field of higher education and public education across the region." In order to sustain the program another two years and increase enrollment, \$600,000 will need to be acquired. The funds will ensure the graduation of students in the program and also be able to bring in cohorts of five students per year. The additional funds will also help support in recruiting more staff and resources in order to increase the quality of its participants.

Athletic Building

Cope Hall was constructed in 1966. In the last two years the floor has buckled before basketball season. Our student athletes are some of our most successful students, and they have a higher retention and graduation rate than the student population. Moreover, student athletes represent the University well. However, more funds are needed to advance student achievement and success in athletics and support the University's strategic goals and objectives. These funds must be obtained through the State System's capital budget process.

Funds Needed– New Athletic Facility \$27,000,000. (PA capital funding)

Summary of Projected Fundraising Needs:

In summary, Cheyney University must raise an additional \$7,000,000 over the next three years to support its strategic goals and objectives. This does not include the approximate \$27,000,000 needed for a new athletic building from state capital funding.

<u>Summary of Needs</u>	
Operating Funds	\$ 500,000
Supplementary Capital Projects	\$ 1,900,000
Scholarship Funds	\$ 1,000,000
Centers of Excellence (2)	\$ 1,600,000
Signature Programs	\$ 2,000,000
<u>TOTAL</u>	\$ 7,000,000

This total fundraising goal requires Cheyney University to substantially increase its historical levels of support. CU is somewhat unique in that Sponsored Programs falls within OIA. This is fortuitous because it will require a coordinated effort to enhance both private giving and public support (i.e. grants, earmarks and contracts) in order to succeed. A private giving sub-goal of \$3.0 million and a public funding sub-goal of \$4.0 million are suggested.

With respect to public funding, the emphasis of the overall \$7 million goal on academic programs and student-centered needs that relate to strategic goals suggests a good potential for support from grants, earmarks and contracts. Formulating the grants equivalent of the private gifts chart presented above is a bit problematic since gift size emanates from the requestor, along with negotiation from the donor, whereas grant size is largely grantor-driven. However, the following chart provides an overall framework for enhanced seeking of public funds. Please note that even with the best strategic selection and preparation of grants to pursue, at least five grants must be submitted for each grant successfully funded.

Table for Public Grants, Earmarks and Contracts - Cumulative Sub-Goal of \$4,000,000

<i>Level</i>	<i>Grant Level</i>	<i>Grants Required</i>	<i>Level Subtotal</i>	<i>% of the Goal</i>	<i>Cumulative Total</i>
<i>Level 1</i>	\$1,000,000	1	\$1,000,000	25.00%	\$1,000,000
<i>Level 2</i>	\$500,000	1	\$500,000	12.50%	\$1,500,000
<i>Level 3</i>	\$250,000	4	\$1,000,000	25.00%	\$2,500,000
<i>Level 4</i>	\$100,000	7	\$700,000	17.50%	\$3,200,000
<i>Level 5</i>	\$50,000	6	\$300,000	7.50%	\$3,500,000
<i>Level 6</i>	\$25,000	12	\$300,000	7.50%	\$3,800,000
<i>Level 7</i>	\$10,000	20	\$200,000	5.00%	\$4,000,000
TOTAL		51	\$4,000,000	100.00%	

With respect to private giving, a sub-goal of \$3.0 million translates to roughly 43% of the \$9 million comprehensive goal. Implicit in this \$3.0 million goal is an increase in both the number and size of gifts to support these categories of need and a required focus on “major gifts” of \$25,000 and above. As the gift table below indicates, the acquisition of major gifts is key to CU’s overall fundraising outcomes. Moreover, this depiction stands in stark contrast to recent (baseline) assessments relative to the number and average size of private sector gifts (see p. 7)

Gift Table for Private Gifts Cumulative Sub-Goal of \$3,000,000

<i>Level</i>	<i>Gift Level</i>	<i>Gifts Required</i>	<i>Prospects Required</i>	<i>Level Subtotal</i>	<i>% of the Goal</i>
<i>Level 1</i>	\$1,000,000	1	20	\$1,000,000	33.33%
<i>Level 2</i>	\$500,000	1	20	\$500,000	16.67%
<i>Level 3</i>	\$250,000	1	20	\$250,000	8.33%
<i>Level 4</i>	\$100,000	3	60	\$300,000	10.00%
<i>Level 5</i>	\$50,000	3	60	\$150,000	5.00%
<i>Level 6</i>	\$25,000	14	280	\$350,000	11.67%
<i>Level 7</i>	\$10,000	30	300	\$300,000	10.00%
<i>Level 8</i>	\$1,000	150	1,500	\$150,000	5.00%
TOTAL		203	2,260	\$3,000,000	100.00%

Analysis

The private gift table demonstrates the critical importance of major gifts of \$25,000 and above. Specifically, CU would need to secure no less than **23 gifts from Levels 1-6** in order to achieve this aggressive cumulative goal of \$3,000,000. Furthermore, in order to achieve this goal, **203 donors** must emerge from **2,260 viable prospects** who must be properly identified, screened, cultivated and solicited. This is a major undertaking, particularly given the limited staffing and resources of the Office of Institutional Advancement. An expanded community of interest comprised of trustees, volunteers, peer solicitors must collaborate with Cheyney University

personnel and collectively “manage” this prospect pool “by adhering to proven strategies traditionally referred to as prospects research and “moves management.”

Importance of Leadership Gifts

The gift table presented above (p. 11) reflects a need for at least six gifts of \$100,000 and above (Levels 1-4). In the context of Cheyney University’s fundraising goal, gifts at these levels are referred to as “leadership gifts.” Such gifts serve an important dual purpose. First, gifts of this magnitude represent 68% of the overall fundraising goal. Second, they have a catalytic effect. As leadership gifts are committed and secured, confidence in Cheyney University is elevated. The gradual accumulation of these gifts sends a clear signal throughout the broader philanthropic **community suggesting that Cheyney University is indeed an institution of value and one whose vital mission should be supported.** This catalytic effect typically reverberates as such gifts are widely publicized and acknowledged. In effect they create a wholesome climate of investment that welcomes gifts from other quarters (e.g. alumni and friends of higher education).

Such gifts will be aggressively pursued over the next three years and beyond; particularly as Cheyney University considers the advisability and feasibility of a capital campaign. In 2012, Cheyney University will mark its 125th anniversary as the nation’s oldest historically black college or university. This milestone may constitute an ideal time to launch such a campaign, predicated on acquisitions of leadership gifts over the next three years, 2009-2012.³

V. Prospect Research: The Crux of the Matter

Focused Prospect Research

The aggressive pursuit of CU’s \$7,000,000 goal will require a concerted and sustained effort on the part of an expanded “community of interest” dedicated to identifying and cultivating an increased number of funding prospects.

CU’s process of fundraising will be guided by aggressive prospect research which enables it to identify viable prospects that are worthy of cultivation and solicitation. “Worthiness” is determined by the prospect’s 1) capacity to give, 2) his/her motivation to give and 3) prior or recent giving to education and related causes. Subsequently, the cultivation process leading to solicitation (the actual ask) requires efficient and artful “**moves management**” that is the responsibility of designated administrators, OIA staff, Trustees and/or volunteer peer solicitors.

³ Cheyney University may consider naming opportunities as an incentive for leadership gifts. Named scholarship funds and individual naming rights on various buildings and facilities should be negotiated with prospective donors.

This process will span the full gift cycle from prospect assignment to cultivation, solicitation, securing the gift and then stewardship.

VI. Fundraising Programs, Strategies and Activities: CU Critical Success Factors

The aforementioned (two-year) baseline assessment, coupled with the magnitude of Cheyney University's resource needs provide a clear impetus for substantive change. In the coming years, Cheyney University is committed to approaching fundraising as a shared responsibility and a coordinated effort. A "business as usual" approach is being discarded. As such, the following strategies will be adopted as "critical success factors" that will largely determine the realization of enhanced fundraising outcomes.

- A. Implementation of an Expanded Annual Fund Program
- B. Concerted Emphasis on Major Gifts Acquisitions (e.g., gifts of \$25,000 and above)
- C. Re-Organization of the Office of Institutional Advancement
- D. Revitalization of the Cheyney Foundation
- E. Re-Investment in Support of Vital Institutional Advancement Functions
- F. Forging an Integrated Community of Interest

A. Implementation of an Expanded Annual Fund Program: Establishing Cyclical Patterns of Giving

Establishing Cyclical Patterns of Giving

In previous years, the Annual Fund Program has focused solely on alumni who currently constitute over 95% of the annual fund's direct mail database. With the need to increase revenue, Institutional Advancement has redesigned an expanded Annual Fund initiative to include the cultivation and solicitation from the following segments in an effort to establish cyclical patterns of giving to the CU. The objective here is to reach out to non-alumni, constituent groups as well and encourage them to build Cheyney University into their annual contribution cycles or household budgets.

- Faculty and Staff (current and retired)
- Individuals (non-alumni)
- Parents
- Organizations
- Churches
- Local businesses
- Vendors
- Campus recruiters

Annual Fund Goals: 2009-2012

Measurable Outcomes for the new integrated and expanded annual fund program are as follows:

1. Increase alumni participation in annual giving from 5% to at least 15% over the next three years (with a long term goal of increasing alumni participation to 20%).
2. Increase proportional **non-alumni** participation to the annual fund to at least 30% over the next three years
3. Increase COT participation in the annual fund to 100%
4. Increase annual on-line giving to a least 500 participants in FY 2009-2010 and by increments of 500 in each of the subsequent two years

These goals will be pursued through the following means:

Direct Mail and Target Marketing

Two direct mailings will be conducted in the fall and spring of the next three years targeting the following segments:

- Alumni
- Faculty & Staff
- Retired Faculty & Staff
- Council of Trustees
- Parents
- Friends
- Churches
- Vendors
- Local businesses
- Campus recruiters

Special Segmented Mailings

Two special segment mailings will target lapsed donors (LYBUNTS and SYBUNTS), reunion year alumni and planned giving prospects. Outreach to young alumni will be conducted on-line and through special mail segments.

Senior Class Gift

The Alumni Relations Office and student leadership will consult over the course of the academic year and develop messages, activities and publicity for the senior class gift in 2009-2010.

Payroll Deduction

The OIA will work with the Cheyney University Human Resources Office to receive and maintain updated data on staff and to create greater flexibility in designating gifts through payroll deduction.

Board Giving

The OIA will work the VPIA and the Chairman of the University Relations Committee to ask board members to sign fundraising letters to their peers asking for annual support for CU.

Phonathons

A fall and spring phonathon will be conducted during FY 2009- 2010 targeting lapsed donors, young alumni and alumni with no giving history. During the phonathon, volunteer student callers will reach out to alumni to ask them to support the university.

On-line Giving

The OIA will work with the Public Relations Officer to develop a marketing plan to get the word out that CU has a safe and reliable online giving capacity. Two special appeals targeting young alumni will be sent electronically to recent graduates during FY 2009-2010.

The OIA will continue to obtain e-mail addresses during the course of 2010 in an effort to take a fundamental step toward the development of an e-philanthropy database at Cheyney. Currently, only 7% of the database represents good e-mail addresses. During Fiscal Year 2009-2010 all response cards will ask for e-mail address as well as other updated information. (e.g. addresses and telephone number changes).

Events

In an effort to reach out to alumni in new and more significant ways, the OIA will collaborate with the Office of Alumni Relations to plan and coordinate regional events in cities where Cheyney has at least 20 alumni.

Acknowledgement and Donor Recognition

All gifts will be acknowledged by an official receipt and thank you letter. All donors, regardless of the size of their gift, will receive a personal acknowledgment letter signed by the President.

Donors who increase their support over last year's gift to the annual fund will receive, in addition to a formal acknowledgement, a hand-written note from the OIA thanking them for their increased support.

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New donors will receive a new donor welcome letter designed to affirm the new donor and welcome them to the Cheyney giving community. An official acknowledgement letter and receipt containing strong donor affirmation content will be sent shortly thereafter. This letter will be signed by the President.

Phonathon pledges will be acknowledged in writing immediately after the pledge is made via a handwritten note from the student caller who took the pledge. When pledges are fulfilled, a formal acknowledgment/receipt will be sent. Individuals who pledge during phonathon but do not fulfill their commitment will receive pledge reminder letters and a phone call. Unfulfilled pledges will be written off at the end of the year.

Gifts made in memory of (or) in honor of people will receive a special acknowledgement letter signed by the president or the VPIA. Families of the deceased (or) people who have been honored will be notified that a gift has been made in their honor/memory. All new and renewing annual fund donors (unless otherwise advised) will be noted in the Honor Roll of Donors published at the end of each fiscal year.

B. Emphasis on Major Gift Acquisitions

The aforementioned baseline data clearly indicate a need to focus on major gift acquisition to better meet the CU's resource needs. Specifically a decided outreach to individuals of wealth, private foundations and selected (profitable) corporations is needed. Beginning in September, 2009, the OIA will initiate a Major Gift Program led by a new **Director of Development**. The Major Gift Program will function to identify, cultivate, and solicit major gift prospects (\$25,000 and above) including individuals, corporations and foundations.

The identification of major gift prospects will be achieved through extensive prospect research and "leads" forwarded to and provided by the President, our Trustees, volunteer solicitors and the OIA. The major gift cultivation and solicitation process is outlined below.

Alumni Major Gifts Cultivation

Wealth screening research conducted in FY'08 has uncovered 117 alumni prospects that have capacity to make a gift in the \$10,000 plus gift range. These prospects will be contacted for one-on-one meetings with OIA staff to determine donor interests and perspectives on the CU. As appropriate, follow-up meetings will be scheduled with the President. These major prospects will also be targeted to receive a quarterly letter from the President and invitations to special events and activities.

Charitable Gift Annuity Program

Beginning in the Fall 2009, the OIA will market a recently developed and approved Charitable Gift Annuity Program established at the Philadelphia Foundation to benefit scholarships for

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students at CU. The Charitable Gift Annuity is a simple and convenient way to make a generous gift to CU while providing an income stream for the donor that is fixed, regardless of market conditions. In exchange for a charitable gift of \$10,000 or more, donors will receive a fixed stream of income for life (or the lifetimes of up to two people), backed by the unrestricted assets of The Philadelphia Foundation.

President's Fund for Excellence

A new initiative to recognize top donors to CU will be launched. The President's Fund for Excellence will be marketed to prospects that have the capacity to make a gift at the \$1,000 + gift level. These prospects will receive a targeted appeal in the fall. President's Fund for Excellence donors will be recognized on the CU website, in CU Magazine, and in the Annual Report. These donors will also receive quarterly updates about activities (from the president) and invitations to CU events and activities.

Planned Giving

Cheyney University will revitalize its planned giving thrust and accelerate its efforts to identify, educate, cultivate, and solicit planned giving prospects. As gifts are secured, the new Director of Major Gifts and Planned Giving will maintain relationships with and steward existing donors and secure new planned gifts from carefully screened alumni and wealthy individuals interested in establishing legacy gifts (e.g., wills, estates, insurance policies, etc.)

The Planned Giving thrust will operate as an integral part of the Office of Institutional Advancement of Cheyney University. A fully developed planned giving program will be implemented and function to identify, educate, cultivate, and solicit planned giving prospects. Securing planned gifts and stewardship of existing donors in support of the long-term mission of Cheyney University is the primary focus of the Planned Giving Program.

Prospect Identification

The identification of prospects starts the process and is critical to successful accomplishment of each of the next successive steps (moves management). Identification will be achieved through the following means.

Raisers Edge Database

OIA staff will "mine" its donor/friend/alumni database for prospects using search criteria based on: consecutive years giving history, cumulative gifts, and demographic data. Studies have shown that consecutive years' giving is the leading indicator of planned giving propensity.

Alumni Affairs

The Office of Alumni Affairs maintains relationships and regular contact with alumni and understand the leadership of the clubs, the cities, and the people, thereby supplying the greatest source of personal information and background data. Successful identification of prospects from within CU's alumni pool will depend largely on working with the Alumni Affairs staff to help identify people to engage.

Prospect Research Staff

The OIA prospect researcher will be utilized to provide background research on individuals who might have capacity or propensity to support Cheyney University. This person will help research names that come to us from both internal and external sources and additionally assist us in carefully researching our existing files and database of annual and major gift donors for potential planned giving prospects. Additionally, we will utilize media sources, wealth indicators, and field research to identify prospects, including the development of centers of influence (cultivation and education of referral sources such as professional advisors, key alumni, faculty, Office of the President, department chairs, etc.).

Harris Directory

OIA will review this alumni publication for indicators of capacity or propensity, and coordinate this information with that gathered from alumni affairs, Raisers Edge database, and field research.

Field Research

Includes introductory communication to gauge interest and internal staff feedback on contacts or interest shown. This also includes the use of self-identification forms.

Website Marketing (General)

Utilize direct mail, mail inserts and collateral publications to drive people to our education website on Planned Giving. We will send out our monthly donor newsletter and twice-monthly advisor newsletter by e-mail to educate and inform. We will educate people on how to use our website at presentations and meetings, and provide as a resource for staff to refer people to. Through rotation of editorial and educational content on a regular basis we will provide attractive and beneficial means of education. The OIA components of the CU website will be completely revamped and available for posting by September 1, 2009. On-line giving will be featured on the home page.

Mailings

Targeted mailings describing planned giving methods and strategies will be sent on a quarterly basis to alumni and friends. Timely topic mailings of noteworthy tax laws, articles of interest or other pertinent news will be sent on an as-needed basis. Mail to alumni and friends in advance of travel to alumni club or city.

Presentation/Seminars

Conduct educational seminars and presentations at alumni gathering and three times per year on a local basis or as needed. Provide educational presentations for campus-based alumni events when appropriate.

Website Marketing and Publications and Brochures

Cheyney University is planning to aggressively market planned giving through a re-designed and expanded website. Utilizing direct mail, mail inserts and collateral publications, CU intends to steer people to a website link on Planned Giving. We will send out our monthly donor newsletter and twice-monthly advisor newsletter by e-mail to educate and inform. We will educate people on how to use our website at presentations and meetings, and provide as a resource for staff to refer people to. Through rotation of editorial and educational content on a regular basis we will provide attractive and beneficial means of education.

Also, CU utilizes a variety of printed material to educate our audience. “Planning Strategies” is an introductory piece that outlines various types of planned gifts and their benefits. This piece is to be used as a general handout or included in introductory mailings. “Ways to Give” is a more advanced and in-depth booklet on various types of planned gifts that is to be used as a leave behind piece at presentations/seminars or as a follow-up to individuals after more qualification of interest. Additionally, topic specific brochures on giving through your will, life insurance, securities, and gift annuities will be used as follow-up pieces to direct mail or targeted, topical mailing initiatives. Targeted mailings describing planned giving methods and strategies will be sent on a quarterly basis to alumni and friends. Timely topic mailings of noteworthy tax laws, articles of interest or other pertinent news will be sent on an as-needed basis.

Outreach to the Professional Athletes and the Arts and Entertainment Community

The OIA along with the President will also cultivate sports figures and wealthy celebrities in the local and national arts and entertainment community who are in a position to support Cheyney University’s vital mission through planned and outright gifts. Philadelphia is home to a concentrated number of musical artists and high-visibility executives in the entertainment industry. These area individuals of means and may be individuals with immediate tax-incentives industry. These are individuals of means and may be individuals with immediate tax-incentives

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to give. We will effectively solicit such “tax-motivated” prospects and others who have a high regard for our rich history and musical tradition.

Alumni Receptions

Prominent alumni and active alumni chapters are encouraged to host fundraising and “friend raising” receptions of various sizes. Such receptions could be attended by the president and OIA staff and could help us get our message and appeals to targeted audiences of prospective planned and outright donors.

D. Reconstituting the Cheyney Foundation

Need Assessment

During the past few years, the Cheyney Foundation faced challenges with respect to both leadership and an operational philosophy/vision that was not appropriately aligned with that of Cheyney University’s leadership. The relationship deteriorated to the point that, in May 2009, Cheyney University announced its intention to revoke its Fiduciary Agreement with the Cheyney Foundation, an independent 501 (c) (3) entity. This dramatic step was subsequently reversed. It was, however, a catalyst for reconstituting the Cheyney Foundation.

Both the Cheyney Foundation and Cheyney University recognize a clear and compelling need to have a Foundation that is effectively operated and singularly focused on advancing the CU’s interests and responding to its priority needs. While the Cheyney Foundation operates as an interdependent 501(c)(3) entity (under the provisions set out by the IRS) it nonetheless operates in a coordinated and “seamless” manner so as to achieve the necessary levels of synergy, collaboration and communication that are of critical importance to CU’s fund raising and strategic advancement thrusts.

Cheyney University is facing continued decreases in its state appropriations. These decreases have a direct and adverse bearing on Cheyney University’s operational budget and the overall outreach and effectiveness of its Office of Institutional Advancement (OIA). In addition, Cheyney University and the higher education community at large must secure increased private sector funding in a local and national economy that is experiencing a significant downturn. The Cheyney Foundation’s nonprofit status provides a critical way in which the University can secure funding from corporations and institutional donors whose philanthropy must be targeted to 501(c)(3) organizations. Additionally, the independent nature of the Cheyney Foundation enables it to be a vehicle for underwriting covering necessary, customary and legitimate University expenses that are not allowable with state dollars.

Therefore, now more than ever, Cheyney University needs the collaborative relationship with the Cheyney Foundation in order to aggressively pursue increased funding and resources and effectively manages and disperses them in a timely and efficient manner.

B. Requirements of a Re-constituted Foundation

CU, must have a foundation that serves as a repository and a vehicle for corporations, foundations and individual donors to make tax-deductible contributions to Cheyney University. Such a foundation must meet the following requirements:

1. An Active and Reconstituted Board of Directors
 - A Board of Directors that adheres to an explicit “give or get” minimum threshold for fund raising (e.g. \$10,000) .
 - A Board of Directors that is capable and willing to aggressively solicit professional peers and colleagues.
 - A Board of Directors that brings proven experience and requisite expertise in the areas of fund raising, investment and audits, communications, strategic planning, etc.
2. Must serve as the central repository for private gifts and grants to Cheyney University and must effectively receive and disburse funds for general and restricted purposes consistent with donor intentions (see Appendix A).
3. Must responsibly invest and manage all endowed funds to optimize endowment income and guard against erosion of the endowed corpus amidst market fluctuations and shifting environmental conditions.
4. Professional Staffing – The Foundation must have dedicated full or part-time staff to manage its daily operations.
5. Effective and efficient policies, processes and practices that ensure accountability and transparency.
6. Minimal overhead expenses and justifiable operational costs.
7. Must be domiciled on the Cheyney University campus or its urban site.
8. Must manage all scholarship funds and non-scholarship funds on a consistent and organized basis.

The function of such a foundation is depicted in the graphic below showing how private sector funds can be “funneled” into a bona fide foundation that effectively invests, leverages and disperses funds for designated purposes.

The Cheyney Foundation's goal is to ensure access to funds as needed by Cheyney University. This will require an appropriate balance of transparency and accountability along with the agility and nimbleness necessary to avoid

E. Re-Investment in Support of Vital Institutional Advancement Functions

“A key element for the continuing vitality of Cheyney University is a strong institutional advancement program.”

-Report from the Commission on the Continued Vitality of Cheyney University, 1993

Need Assessment

The implementation of this fundraising plan is in many ways, **resource-contingent**. Fundraising expectations must be based on practical realities under which the university at large is operating. Many of the strategies and proposed activities articulated in this plan call for additional operating funds. These funds are sorely needed if the OIA is to effectively discharge its overall duties and execute this ambitious fundraising plan.

The University is keenly aware that the OIA is under-resourced and is by any objective standard, clearly understaffed in comparison to other PASSHE institutions. Nonetheless these apparent limitations must be weighed against the realities of CU's shrinking state appropriations and its dwindling educational and general budget. For example, due to concerns about an FY2008-09 operating deficit, OIA (along with other units) was informed in March 2009 that all travel expenses, hiring and expenditures from its educational and operational budget were curtailed. This necessary moratorium on spending occurred during “peak season” in the OIA fundraising cycle. During the same year, OIA's Office of Public Relations and Marketing was similarly paralyzed and unable to produce and distribute advertisement and marketing materials that are clearly necessary to enhance student recruitment (an obvious revenue stream for the University).

Looking ahead to FY 2009-2010, OIA will be similarly disadvantaged. The University's OIA budget (as currently constructed) provides only **\$188,423** in total operational (non-personnel) funds. This meager allocation will not allow OIA to effectively discharge its manifold duties or appreciably meet the aggressive goals and objectives delineated in this fundraising plan. Now more than ever, re-investment in OIA functions and operations are critical to the

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success of CU's efforts to achieve solvency and promote strategic growth over the next five years.

In general, OIA will require additional funds reflected in these categories of need.

- Expanded Staffing (for 2010 – 2012) including a Director of Corporate Relations, a Special Events Coordinator and a dedicated (full-time) prospect researcher.
- Prospect Research directories and on-line search-engines.
- Volunteer mobilization and donor cultivation and solicitation activities of University personnel and approved advisory groups.
- Outreach to prospective strategic partners in the education and philanthropic community.
- Travel associated with Major Gifts acquisition.
- Travel associated with expanded efforts to cultivate state and federal grants and contracts.
- Production of public relations, fundraising, and student recruitment materials.
- Advertising for CU programs (e. g, billboards, media outlets and public conveyances).
- Consultants and research analysts operating in Harrisburg, PA and Washington, D.C.

Proposed Solutions

Fortunately, these are two distinct solutions to this institutional dilemma. These solutions can be pursued simultaneously.

1. Utilization of Special Title III Endowment Funds

By July, 2009 Cheyney University will receive funds that were part of a Title III endowment challenge program established 22 years ago. According to the terms of the program, selected HBCU's were to invest these funds over a twenty year maturation period. Cheyney University has recently requested release of the funds that have been held in trust by the Cheyney Foundation. The market value of these funds were estimated to be \$2.1 million on January 29, 2009 (see Appendix F).

It should be noted that this visionary endowment program was specifically designed to help HBCU's build institutional capacity. The time has arrived to put these funds to effective use. Thus the Office of Institutional Advancement has proposed that a portion of these funds be utilized to support this fundraising plan. An estimated \$300,000 is being requested over the span of this three-year plan.

2. Capacity Building Grants

The Office of Institutional Advancement is developing a proposal for a "capacity building" grant that will address the critical needs stated above. Such a grant would also support enrollment

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management functions that are vital to Cheyney University's recruitment efforts and its revenue stream.

This proposal will be submitted in the fall, 2009 to the William Penn Foundation, the Kresge Foundation, and other philanthropic entities (as identified). Funding requests will be at the level of \$250,000-\$300,000 over a three year period.

Finally, Appendix G itemizes specific requests from key units comprising the Office of Institutional Advancement: alumni relations, government relations and public relations and marketing. These combined requests total \$278,728 need to advance their specific portions of this fundraising plan.

VII. Alumni Relations

Fundraising Goal: \$1,000,000, 2009-2012

The Office of Alumni Relations is committed to enhanced fundraising and to fully engaging Cheyney University alumni. The Alumni Relations mission includes cooperating in every reasonable way to support the work of Cheyney University and the activities of its student body. It also includes a commitment to forming productive relationships, encouraging alumni support of Cheyney University through giving back, volunteering and inspiring pride amongst the Cheyney University family. Its current fundraising goal is to secure a minimum of **\$1,000,000** over the next three years. This is a worthy "stretch" goal that is attainable by implementing the following strategies:

Reclaim and Engage - developing and implementing initiatives that reclaim, reunite, and engage alumni.

Fund-raising - directing the alumni annual campaign to build and maintain alumni support for Cheyney University by soliciting and coordinating alumni contributions and fundraising events.

Program Development - developing programs that showcase the value of alumni and programs through which alumni can assist CU in achieving its goals.

Public Relations and Communications - fostering relationships among alumni ambassadors, volunteer organizations, and corporate and civic constituents; maintaining and improving communication between Cheyney University and alumni through targeted and timely messaging.

Recruitment - assisting with the recruitment of students by fostering alumni involvement.

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Relationships- assisting in improving relationships between alumni and parents, students, staff, current/past faculty.

The office of alumni relations is that University Advancement component that works toward building a new constituency, of proactive alumni and pre-alumni “That is current Cheyney students” as friends and financial contributors to Cheyney University.

To fulfill this objective, the office of alumni relations engages alumni in a wide range of program activities, such as Homecoming, Founders Day, Class Reunions, Social, Cultural, and Athletic events, and host recruitment activities and networking opportunities to sustain a seamless link between students and graduates, and graduates and their alma mater. Seeking to engage all Cheyney Alumni, in a mutually beneficial lifelong connection to each other, their school and the University, and encourage alumni support and guidance to advance Cheyney’s eminence for future generations.

In doing so we continue to develop a positive working relationship with the Alumni Association that results in an increased financial and student recruitment support for the University.

- Increase the total yearly giving from alumni.
- Maintain and continue to upgrade the alumni/development database.
- Create opportunities for University officials to meet with key individuals from the President’s Friends list, affluent alumni and influential alumni.
- Position and promote Cheyney University as a leading innovative community based institution by strengthening relationship with the alumni and local community.

Goal I

Secure alumni contributions to enhance the financial strength of the Cheyney University.

Strategy:

Work in conjunction with the OIA staff to secure the alumni fundraising goal

Action Steps:

- Design the direct appeal letters and select the appropriate signatory
- Develop a marketing strategy for online giving by October 2009

Strategy:

Employ the leadership of respective class agents to assist the Alumni Relations Staff to generate monetary gifts from reunion classes

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Action Steps:

- Determine the overall goal and assign individual class goals
- Select class agents and inform them of their duties
- Identify alumni in 2010 class reunion by August 2009
- Send class agents packets by October 2009
 - Develop an electronic list of Alumni with class years ending in 0's and 5's
 - Determine the methods of solicitation by October 2009
- Send four direct mail solicitations
- Execute a year-end "clean-up" phonathon

Strategy:

Employ the leadership of respective class agents to assist the Alumni Relations staff in planning ahead for the class 2011 Class Reunion.

Action Steps:

- Determine the overall goal and assign individual class goals
- Select class agents and inform them of their duties
- Identify Alumni in 2011 Class Reunion by May 2010
- Send class agents packets by October 2010
- Develop an electronic list of alumni with class years ending in 1's and 6's by October 2010
- Determine the methods of solicitation by November 2010

Strategy:

Work with the Director of Planned Giving and Major Gifts to identify previous and prospective planned giving prospects.

Action Steps:

- Review and verify the alumni and existing planned giving roster
- Identify and submit 25 planned giving prospects by December 2010

Strategy:

Identify and segment alumni major donor prospects to cultivate donors who will ultimately support Cheyney University's major gift initiatives.

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Action Steps:

- Compile and stratify a 4 year report of alumni donor of \$500 and above level of giving
- Identify peer cultivator/solicitors within the stratified donor groups
- Engage 15% of the peer cultivator /solicitors to solicit or identify prospects for solicitation by staff.

Goal II

Enhance Alumni Relations through the delivery of services to alumni.

Strategy:

Present and outstanding Founders Day Event

Action Steps:

- Select a speaker in collaboration with the President, the alumni, and the Office of Institution of Advancement
- Select other Founders Day participants by September 2009
- Select student participant by September 2009
- Arrange for Founders Day Luncheon September 2009

Strategy:

Enhance homecoming weekend for returning alumni

Action Steps:

- Develop a registration process and homecoming breakfast to capture attendance and informational data
- Work with the athletic director and the new alumni to develop new initiative for the homecoming weekend that would be appealing to a diverse audience and the younger population in particular.
- Market the initiative on the alumni web page, Wolves Unit, Face book and by email correspondence
- Implement the plan by homecoming 2009

Strategy:

Reclaim 10% of the 8000 "Lost Alumni"

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Action Steps:

- Select a company to locate lost alumni by November 2009
- Engage service of company by January 2009
- Update electronic system by March 2009

Strategy:

Develop an Alumni volunteer program.

Action Steps:

- Determine the size, cost and benefits/rewards of the program
- Develop job description based on the scope of the program
- Interview candidates and select participants
- Evaluate the program at all times

Strategy:

Improve communication to alumni.

Action Steps:

- Submit all newsworthy alumni information to the Director of Marketing for communications for inclusion in the CU publications
- Keep the alumni webpage managed and updated with current and relevant information at least quarterly
- Keep Wolves Unit and Face book webpage updated with current and relevant information at least quarterly

Strategy:

Continue to assist with development of the new alumni component

Action Steps:

- Develop a marketing strategy for the online giving initiative that will attract 5% of the new alumni population
- Encourage the new alumni to use the link to the alumni web page and keep it updated with their activities

Goal III

Develop better alumni/student relations

Strategy:

Explore establishing a pre-alumni association

Action Steps:

- Gather information on establishing an association
- Determine which model will be adopted
- Meet with the Vice President of Student Affairs, Director of Student Activities and the respective class leadership to determine interest and “buy-in” by September 2009
- Develop a fundraising component of the program and introduce it to the class leadership
- Develop an electronic evaluation instrument and make it accessible and operational.

Strategy:

Establish a meeting each semester with the senior class to have dialogue relative to “What it means to be a Committed Alumni”.

Action Steps:

- Meet with the leadership of the senior class and secure “buy-in” for the concept by October 2009
- Select and invite a local alumnus to dialogue with the senior class by November 2009
- Convene a senior class meeting that will attract 75% attendance
- Develop an evaluation instrument to assess success

Strategy: Continue to participate with the Office of Student Affairs in the annual “Senior Brunch” to cultivate graduating senior for membership in the National Alumni Association as well as initiating a life-long commitment to their alma mater

Action Steps:

- Secure the names of the graduating senior by at least three weeks before the event
- Update the congratulatory letter with an attached alumni membership card, by one week before the event
- Update the data, questionnaire for the purpose of creating the graduates first file in the alumni office
- Invite volunteers to manage the alumni portion of the brunch by one month prior to the event

Strategy:

Develop in conjunction with the Office of Career Services and Alumni Resources Bureau

Action Steps

- Meet with the Director of Career Services to determine the needs of our students
- Develop a list of alumni who can serve the indentified students needs
- Invite and schedule an alumnus to participate in the inaugural event of this program
- Send information on the inaugural event to the Director of Marketing for communications to be published in the next Cheyney University magazine, one week after the event.
- Develop in concert with the Director of Career Service an evaluation instrument that will determine the effectiveness of the program
- Invite and schedule one alumnus for the first semester and one alumnus for the second

VIII. Government Relations and Sponsored Programs

ARRA Funding

Over the next two years, Cheyney University and key constituent groups will be communicating with key legislators and governmental officials to secure federal funds derived from the American Recovery and Reinvestment Act (ARRA) that was recently enacted by President Obama and the U.S. Congress. Those ARRA “stimulus funds” are to provide **\$1.6 billion** through the state’s **Fiscal Stabilization Fund** to support local school districts and public colleges and universities.

Governmental Grants and Contracts, 2009-2012

In a depressed national economy, increased governmental grants and contracts may well serve to offset anticipated decreases in private sector giving. Thus in keeping with priorities established by President, Dr. Michelle R. Howard-Vital and articulated in the Academic Plan (March 2002), government funding will be pursued in order to address the following needs:

1. Capital Projects - Major Renovation & New Construction
2. Center of Excellence (COE) in Media, Communications and Entertainment Arts
3. COE Natural & Applied Sciences
4. COE Social & Behavioral Sciences
5. The Call me Mister Program
6. Teacher Education
7. Public Policy/Public Admin.
8. Entrepreneurial Studies

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9. Recreation & Leisure Studies
10. Aquaponics
11. Student Retention Initiatives
12. Keystone Honors Academy
13. Athletic Programs
14. Capacity-Building Initiatives
15. Graduate/Professional Studies

Funding will be pursued at the state and federal level via grants, appropriations (aka earmarks) and contracts. Securing funding is dependent upon the following components:

1. Enhancing a grant seeking culture among faculty and staff:
 - a. Conduct at least one Grant Writing workshop each semester.
 - b. Conduct at least one Grant Management workshop each semester which also provides training by Budget Office and Contracts.
 - c. Develop Sponsored Programs Intranet Site accessible by faculty and staff which will provide:
 - i. Grant Writing and Management FAQ
 - ii. Sample grants that have been funded
 - iii. CU identifier numbers required for government grant submissions
 - iv. Report forms for most relevant agencies
 - v. Posting of grant opportunities
 - vi. Links to external resources, list serves, etc.
 - vii. Recognize faculty and staff who either have had their grants awarded or those who have applied.
2. Cultivating relationships at the state level:
 - a. Advocacy Day, 2nd Tuesday in February, is the annual themed kickoff for engaging state legislators via carefully scripted meetings involving CU constituents (students, alumni, faculty, staff) and key legislators (those who represent main campus and urban site as well as chairs of committees relevant to the President's priorities for CU). Advocacy Day is held in conjunction with the Pennsylvania Legislative Black Caucus' Black History Month program (of which Cheyney is an integral part) and provides collateral free PR. This should be one part of an array of activities including legislative breakfast at Cheyney as well as private visits with legislators both in Harrisburg, at their local offices and on campus.

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- b. State legislators provide access and influence with respect to available discretionary funds, identifying sources of grants and contracts funding, providing support for grant applications, and facilitating the establishment of fruitful collaboration. There are numerous programs but many are loans. State legislators can help, especially since their discretionary dollars comes from DCED. This requires ongoing cultivation that involves both visiting the legislators throughout the year and securing their visits to campus. Campus visits are customized according to the committee assignments and/or interests of the visiting legislator. Budget for 2009-10 enables two visits to Harrisburg.
- c. Successful grantsmanship is enhanced by developing relationships with agency leadership and program officers. Our principal funders among Pennsylvania agencies are the Department of Education and the Department of Public Health. The Department of Education holds potential for more funding to support K-12 teacher training and special education. Special Economic Recovery and Reinvestment Act-funded grants will flow to the PA Department of Education and we will need to monitor this. A minimum of two visits per year is needed in order to build a relationship that maximizes the potential for “inside knowledge” and successful submissions.

Resources:

- a. Engage resources of a Harrisburg-based consultant. The Government Relations and Sponsored Programs Office is aware of several individuals who have extensive relationships in Harrisburg and can provide needed access and influence. Please note that these individuals are registered lobbyists and their scope of work does not include lobbying. Given our meager budget, engaging the resources of a Harrisburg-based consultant can be used to advance a variety of relationship/agenda items relating to funding, legislative issues and relationships. Goals for 2010 could include securing a PLBC retreat on Cheyney’s campus, which would conceptualize, crystallize and energize a shared agenda. We are seeking grant funding to cover this cost of \$10,000 for a trial scope of activities in FY 2010.
 - b. Collaborate with PR/Marketing to keep our state legislators informed of our progress, achievements, successes and challenges via hard and/or e-mailed newsletters, Cheyney Magazines, press releases, fact sheets and blogs. Subject matter should include institutional topics and well as spotlights on programs, faculty and students.
3. Cultivating relationships at the federal level:
- a. Cheyney University needs to expand its Pennsylvania Advocacy Day efforts at the

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federal level. The ideal time to do this is at the annual Congressional Black Caucus, which this year will be held September 23-26. This is a very effective way for us to network with legislators, business and industry leaders and potential collaborators. We can have an affordable presence by having key administrators and possibly a select few students attend. Ample opportunity exists for disseminating information about our positive stories as well as our challenges.

- b. It is essential that we cultivate the federal legislators who represent our main campus and urban site as well as those who represent areas of interest – i.e. Philadelphia, Chester and Coatesville. The Black Caucus conference can be used to frame our agenda for the year. The budget allows for 2 legislative visits to D.C. However, these should be in addition to the Black Caucus Conference. These visits should be held in either early November or mid-January, and then again in the late Spring. The timing of the late fall visit is strategic with respect to developing strategies for the annual appropriation requests due in February.
- c. Cultivating relationships with program officers of federal agencies also is critical, especially because numerous ARRA-funded grant opportunities will be rolled out over the next year. Critical agencies include NSF, DHHS, Education, Department of Justice, Department of the Interior, NEA, DOD, Department of Energy, HUD and Institute of Museum and Library Services. Budget allows for 2 visits per year.

Resources:

Continue the engagement of a part-time employee in “the Beltway.” This collaboration has enabled us to secure; appropriation funding in excess of \$2 million for the past two years. This individual also has served as an important resource for identifying grant opportunities as well as securing appointments with legislators and program officers. This individual is not a registered lobbyist and his scope of work does not include lobbying. The position is grant-funded.

Professional Development:

- a. PASSHE Grants Officers Meetings – Twice a year
- b. HBCU conferences – Budget allows for one. Critical to keep abreast of HBCU-specific opportunities as well as for networking
- c. Sponsored Programs Conference – budget allows for one

IX. Public Relations and Marketing

Enhancing Institutional Image

In addition to its traditional responsibilities, the Office of Public Relations and marketing will play a critical role in the University's \$9,000,000 fundraising plan. That role is centered on the quintessential need to enhance CU's public image. That image is one of an institution that has been in steady decline and is therefore, not worthy of support and re-investment. This image is unfair, over-stated and widespread. It is also injurious to fundraising and thus must be faced head-on with a "positive image campaign". This campaign will be led by this office but fully implemented by the entire OIA staff.

This is a Herculean task for an office that is critically under-resourced and staffed with only one professional and one administrative assistant. Thus it bears repeating that beginning in FY 2009-2010, this office must be undergirded with additional monies drawn from Cu's Title III endowment funds that are now immediately available for disbursement. (see Section VI E and appendix G).

Briefly stated, the goals of this positive image campaign will improve our institutional image and support fundraising by:

- Enhancing the institution's public image in the region and the nation at large
- Heightening positive visibility in the media (print, radio television) and the Internet
- Generating and distributing publications and printed materials highlighting CU's educational mission (access, opportunity and excellence)
- Increasing public awareness of CU's programs of distinction and overall academic strengths
- Publicizing the accomplishments and contributions of CU alumni, students, faculty, trustees and administrators.
- Generating "human interest" stories of direct relevance to the Provosts' new academic plan and the evolving strategic plan.
- Developing marketing and promotional materials in support of the university's student recruitment thrusts
- Assisting in the planning and implementation of donor cultivation events and moves management functions
- Assisting in the promotion and publication of various community outreach activities including, student-led service-learning projects and charitable fundraising activities by CU constituent groups
- Leading a campus-wide effort to improve customer service and student satisfaction

Promoting Cheyney University in the Community

Personal appearances by the CU choir and band at local news affiliates and community events will help to build a more positive view of CU for those who aren't familiar with the mission of

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access, opportunity and excellence. For example, the upcoming opportunity for CU's band to lead the Harlem African- American Day Parade will be an opportunity to gain local, regional and national attention. Another planned initiative is the creation of the new speaker's bureau, which will be unveiled in the fall 2009 semester. This group of CU staff and faculty are voluntarily posted to a list on the website with brief bios and an explanation of their expertise and possible topics. These individuals are then able to be booked for speaking engagements through the Office of Public Relations and Marketing. There will be both paid and unpaid opportunities that will benefit the experts professionally and CU's overall image and increase visibility. This initiative will help to support the new academic plan's focus on showcasing the talents and accomplishments of the faculty.

Customer Service

Finally, customer service is another key component to improving Cheyney University's image and in turn, facilitating fundraising. Great customer service is the lifeline to any successful enterprise. Thus in the coming years, this office will make every effort to uphold and promote the highest standards of public service throughout the campus community and in regard to its relations with a broad range of external constituents.

X. Summary

A Defining Moment in Time

This ambitious plan is developed at a time when Cheyney University needs a major infusion of new funds and non-monetary resources. Unfortunately, this same moment in time bears witness to a depressed economic climate and a sharp decrease in private sector giving to higher education institutions. Against this backdrop, CU is forging ahead realizing that its goal of \$7,000,000 over the next three years will be difficult but not un-attainable.

This plan is predicated on the premise that CU's fundraising aspirations are coupled with a commitment to think more expansively and embrace new and different fundraising strategies and activities. Many of these strategies are proven and time-tested. Others have not been considered or implemented at CU in recent memory. Nonetheless, these strategies represent "critical success factors" that cannot be ignored. Section III of the plan provides a baseline assessment fundraising results over the past two years. Section IV states significant "stretch" goals that forcefully indicate that CU cannot expect to reach these elevated fundraising goals with a "business-as-usual" approach. In brief, Cheyney University recognizes the expansion of its Office of Institutional Advancement's resource capability as a prerequisite for achieving this major undertaking.

It also recognizes that now more than ever, CU must forge an enlightened "community of interest" that can help expand Cheyney University's resource base and restore public confidence. A new climate of strategic re-investment Cheyney University must prevail and this

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is best achieved through an immediate focus on securing “leadership gifts” that stimulate public confidence, elevate institutional visibility and provide a catalytic boost in other major gifts. In this regard, CU’s best chances for success may well hinge upon how well this community of interest pulls its various talents and contacts and collectively brings its influence to bear using the prospect research and moves management processes that are outlined in this plan. Herein lies a decisive and meaningful role for CU’s Council of Trustees; and it is one that they wholeheartedly embrace.

At this critical juncture, Cheyney University is making a concerted effort to energize and “enlist” this community of interest, based on Cheyney University’s historic contributions to the region and the nation at large. Yet is it more likely that not that this community will be inspired by Cheyney University’s contemporary vision and its strategic thrust to be a truly service-driven institution that is uniquely and ideally positioned to provide greater college access and educational programming that leads to economic opportunities. This need could not be any greater. And now is the time for Cheyney University to meet it.

The Road Ahead

The road ahead is difficult to foresee. Informal estimates project that the national economy may not show appreciable signs of recovery until FY2010-2011. Meanwhile a focus on individual gifts (partly motivated by tax incentives) is warranted. Also, during this uncertain economic period, bequests and planned gifts may be far more probable than outright major gifts. In the aggregate, major gifts in 2009-2010 may be sluggish, but can spike in the following two years following the projected recovery. Accordingly, Cheyney University will use year one of this plan as a building period to:

1. Re-organize and expand the resource capability of its OIA
2. Form and legally incorporate a new foundation
3. Form and consult with a Presidential Advisory Board and other consulting groups that understand and appreciate CU’s vital mission and want to lend a helping hand.

Toward a Major Capital Campaign

At the conclusion of this three-year plan (2012), Cheyney University will celebrate its 175th anniversary as the nation’s oldest historically black college or university. Based on economic indicators and trend lines, this may be an auspicious time to announce a major capital campaign designed to chart the course of Cheyney University over the next two decades and beyond. If such a campaign is deemed feasible and advisable at that juncture, the faithful execution of this proposed fundraising plan may itself prove to be “critical success factor” yielding far-reaching benefits.