

Funding Pathways to Excellence 2010-2015
An Institutional Advancement External Funding Plan for Supporting Cheyney University

Introduction/Analysis/Forecast

A Cheyney University Institutional Advancement Comprehensive Fundraising Plan was developed in June 2009. It was designed to give vision to the needs of the university both programmatic and infrastructural that could leverage the engagement of “a community of interests” (internal and external constituencies). The plan featured a three-year campaign to raise \$9 million.

Since the 2009 release of this plan, we have witnessed a persistent weakness in the economy locally which has mirrored national trends (i.e. unemployment statistics, housing sales and personal and business bankruptcy filings among other indicators). The impact on charitable giving is detailed in [Giving USA 2011: The Annual Report on Philanthropy for the Year 2010](#) released in June by The Giving USA Foundation and the Center on Philanthropy at Indiana University. This report states that donations by individuals (who contribute the vast majority of philanthropic dollars) fell by nearly 15%, adjusting for inflation, over 2008 and 2009 – the highest percentages of decline in the past fifty years. While total charitable giving rose 3.8% in 2010, the report cautions that the persistent recession could mean that donations may not return to pre-2008 levels until 2016.

It is against this backdrop that Institutional Advancement decided to re-examine its plan; not just the financial goals but the approach itself. In times of generosity, it is permissible and even encouraged to “dream big” and engage constituencies in supporting a wide range of large-scale fundraising endeavors.

These are different times.

Cheyney University adopted a new strategic plan in June 2010 entitled [Pathways to Excellence: 2010-2015](#). The plan is driven by six overarching goals which inform university-wide planning, budgeting, implementation and execution, reporting, assessment and continuous improvement. In alignment with this new plan, the Office of Institutional Advancement (aka OIA) now reports on the receipt of external funds primarily according to strategic goal(s) supported by those funds and secondarily by income source. This enables Advancement and, indeed, all stakeholders to take note of the degree to which various programs, initiatives and aspects of the university are compelling with respect to financial support. By analyzing support both by strategic goal and by income source, we can better predict giving patterns programmatically and can assess which areas may need strategic triage in terms of inadequate financial support.

Institutional Advancement’s new External Funding Plan takes into account the economic landscape referenced above as well as the new political realities in Pennsylvania which cut support of Cheyney University and its thirteen fellow member institutions of the Pennsylvania State System of Higher Education by 18%. Further, this new Plan is conceived within the strategic goals and timeframe of [Pathways to Excellence](#).

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The Office of Institutional Advancement has done an analysis of external funding for the past five years in order to set goals for the period encompassed by this new plan:

Cheyney University External Funding Analysis FY 2006 - FY 2011

<u>Income Source</u>	<u>FY 2006</u>	<u>FY 2007</u>	<u>FY 2008</u>	<u>FY 2009</u>	<u>FY 2010</u>	<u>Total</u>
Individuals	106,728	113,851	189,363	197,148	234,858	841,948
Corporations, Foundations & Organizations	396,007	345,912	711,980	278,327	312,938	2,045,164
Government	<u>1,880,120</u>	<u>2,770,171</u>	<u>4,926,643</u>	<u>7,476,982</u>	<u>6,979,464</u>	<u>24,033,380</u>
Total	2,382,855	3,229,934	5,827,986	7,952,457	7,527,260	26,920,492

Observations

- It is worth noting that in FY 2009 Cheyney University ranked second among the fourteen member institutions of the Pennsylvania State System of Higher Education in the securing of external funding.
- It can be seen from the above chart that government grants have become an increasingly important source of support. This is due to our faculty whose research capabilities are both broadening and increasing significantly.
- FY 2006 and FY 2007 were strong years for corporate, foundation and organization support due to a 170th anniversary campaign with lead/leveraging support from the Tom Joyner Foundation's School of the Month program.

Pathways to Excellence was approved just before the beginning of the July 1, 2010-June 30, 2011 fiscal year. Thus, Institutional Advancement's financial forecasting for the 2010-2015 periods includes one completed year.

The Office of Institutional Advancement is projecting that external funding for 2010-2015 will total approximately \$37.4 million. The chart below, based on prior funding analysis, suggests the degree to which various strategic goals will be supported.

Cheyney University Projected External Funding 2020-2015 Per Strategic Goal

<u>CU Strategic Goal</u>	<u>FY 2011</u>	<u>FY 2012</u>	<u>FY 2013</u>	<u>FY 2014</u>	<u>FY 2015</u>	<u>Total</u>
Goal 1 - Strengthen Academic Quality & Success	427,788	466,956	531,368	616,335	722,533	2,764,980
Goal 2 - Advance Student Achievement & Success	1,931,531	2,307,540	2,569,717	2,915,872	3,337,652	13,062,312
Goal 3 - Enhance Institutional Effectiveness	1,450,923	1,351,238	1,524,453	1,757,217	2,046,128	8,129,959
Goal 4 - Nurture Human Capital	69,940	79,305	87,112	100,493	117,122	453,972
Goal 5 - Cultivate Public Engagement & Citizenship	1,450,420	1,583,227	1,799,375	2,087,275	2,447,150	9,367,447
Goal 6 - Pervasive Use of Technology	<u>565,000</u>	<u>616,734</u>	<u>700,625</u>	<u>812,725</u>	<u>952,850</u>	<u>3,647,934</u>
	-	-	-	-	-	-
TOTAL	5,895,602	6,405,000	7,212,650	8,289,917	9,623,435	37,426,604

This plan reports that \$5,895,602 in external funding was secured in FY 2011 and projects that \$31,531,002 will be secured between July 1, 2011 and June 30, 2015 for a total of \$37,426,604 for the entire period of the plan.

Please note that this is a projection of funding based on recent given and present economic conditions. It is exclusive of any special campaigns or initiatives which may arise which could involve further analysis via consultants. Rather, this projection should be viewed as a basis from which situational or visionary adjustments can be made depending upon the events of the next four years.

This chart is meant to provide a foundation for assessing those goals that may be inadequately funded based on other divisions' (e.g. Student Affairs or Academic Affairs) plans for achieving these goals. Rather than be perceived as the culmination of Institutional Advancement planning, it is really represents a baseline for conversation and informed implementation of activities that will be carried out to realize this income.

The external funding detailed in the above chart is expected to flow from the following income sources:

Cheyney University Projected External Funding 2010-2015 Per Funding Source

<u>Income Source</u>	<u>FY 2011</u>	<u>FY 2012</u>	<u>FY 2013</u>	<u>FY 2014</u>	<u>FY 2015</u>	<u>Total</u>
Individuals	283,936	310,000	337,900	368,311	401,458	1,701,605
Corporations, Foundations & Organizations	573,028	595,000	624,750	671,606	721,977	3,186,361
Government	<u>5,038,638</u>	<u>5,500,000</u>	<u>6,250,000</u>	<u>7,250,000</u>	<u>8,500,000</u>	<u>32,538,638</u>
Total	5,895,602	6,405,000	7,212,650	8,289,917	9,623,435	37,426,604

This plan reports that external funding already secured in FY 2011 totaled \$5,895,602:

- \$856,964 from private sources.
- \$5,038,638 from government grants and contracts.

This plan projects that external funding still to be raised in FY 2012-2015 will total \$31,531,002:

- \$4,031,002 private sources.
- \$27,500,000 from government grants and contracts.

This plan projects that external funding to be secured during the entire FY 2011-FY2015 time frame of Pathways to Excellence will total of \$37,426,604:

- \$4,887,966 from private sources
- \$32,538,638 from government grants and contract.

The following assumptions inform these projections:

1. Budget reductions of PASSHE institutions' budgets by the Commonwealth received extensive publicity and, for the first time, many in the public at large are beginning to understand that universities such as Cheyney are state-assisted rather than state-supported. In a metropolitan region so replete with private colleges and universities, Cheyney University may finally be in a position to compete for financial support without being viewed as "already taken care of" by the Commonwealth.
2. Individual giving, the robust bulwark of philanthropy in America, is still experiencing conservative growth/rebounding from the heights of three or four years ago as the economy struggles to stabilize and grow. The Giving USA study reported that individual giving rose by an estimated 2.7% in 2010. Nonetheless, we are forecasting an optimistic 9% annual growth for two reasons. First, the one component of the previous plan that has taken root and blossomed is the alumni \$1 million campaign. To date, they have raised \$680,861 and have hopes of achieving their goal by the campaign completion date of December 31, 2012. Secondly, alumni aside, we have not tapped the true potential of our governance, volunteer and employee base. Our hope is that budget cutbacks will spur giving at a level that should be achievable.
3. Corporations are rebounding fiscally and the Giving USA study does report that corporate giving rose approximately 10.6% last year. Locally, however, we continue to see a shrinking of locally headquartered corporations as mergers and acquisitions and outright closures continue. Additionally, there is much anecdotal evidence that businesses are saving as much of their increasing profits as possible as a hedge against continued economic weakness and instability. Tempering corporate rebounding is foundation giving which, according to the Giving USA study, actually fell by 0.2% in 2010. We have noticed within the past year that many foundations within the past year have emerged from a "no new submissions" stance to a gradual resumption of their prior scope of grant making. Overall, Institutional Advancement is assuming that income growth from corporations, foundations and organizations will be 5% in FY 2012 and FY 2013 and then 7.5% in FY 2014 and FY 2015 as the economy recovers.

4. Government grant seeking is being projected to increase at the most aggressive level of all of the sectors as the university adds more resources to tapping this critical funding source. The capacity-building component of our U.S. Department of Education Title III funding is enabling us to develop a core of per-project external grant writers, each of whom will be assigned to an academic dean. As a result, we will be in a better position to seek funding for the Keystone Honors Academy (originally slated to be eliminated in the first version of the Commonwealth budget), our Call Me MISTER urban education teacher training program, our Centers of Excellence in the Humanities and Communications Arts and in Natural and Applied Sciences, Merit Based Scholarships, Last Dollar Scholarships as exemplified by the Alumni \$1 million campaign and the need for a technological revamping of our libraries.

How We Get There:

The Annual Fund

The Annual Fund provides an ongoing variety of fundraising vehicles throughout the year that target the various segments of private donors. The Annual Fund often provides the first Cheyney University experience for a donor and thus serves as a baseline for repeated and enhanced giving. In support of the IA Plan, the Annual Fund has established three overarching goals for 2010-2015:

1. Increase base of support from non-alumni individuals by 9%.
2. Increase proportional non-alumni participation to the annual fund to at least 30%.
3. Increase online giving in increments of 100 donors annually.

The Annual Fund utilizes the following vehicles in order to achieve its goals:

Direct Mail and Target Marketing – A year-end appeal is conducted annually (additional mailings are done as budget permits). It is supplemented by targeted feature articles and philanthropy tip columns which are strategically placed in publications such as Cheyney Magazine which is mailed twice a year to approximately 10,000 households. Links on Cheyney University's webpage provide further methods to target annual fund appeal messages. The audiences for these various print and electronic messages include:

- Alumni
- Faculty & Staff
- Retired Faculty & Staff
- Council of Trustees
- Parents
- Friends
- Organizations
- Vendors
- Local businesses

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Special Segmented Mailings – Special segment mailings that target lapsed donors have been conducted but are being examined for more cost-effective methods of delivery, such as web, social media and within publications. Outreach to young alumni will be conducted on-line and through special mail segments.

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.

Phonathons – A minimum of one phonathon is done each year. Different times will be chosen each year in order to analyze giving patterns that will inform long-term strategies. Phonathons target lapsed donors, young alumni and alumni with no giving history. The calls are made by student volunteers trained and assisted by IA staff and alumni.

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, reliable, flexible and user-friendly online giving capacity. The OIA will continue to obtain e-mail addresses at special events and meetings 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. Donor communication materials will ask for e-mail address as well as other updated information (e.g. addresses and telephone number changes).

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 VPIA and the Director of Development 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 Charitable Gift Annuity (\$10,000 threshold) will be the first planned giving product to be rolled out (target date FY 2015).

Donor Services/Prospect Research - Supports the Annual Fund and all of IA through prospect identification, cultivation, acknowledgement and stewardship. The Raisers Edge database, leads by all members of the Cheyney constituency and a variety of online research tools are used to qualify prospects which are then cultivated for transformation into donors. All gifts are 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. Gifts made in memory of (or) in honor of people receive a special acknowledgement letter signed by the president or the VPIA. Families of the deceased (or) people who have been honored are notified that a gift has been made in their honor/memory, if the contact information is provided by the donor. All new and renewing annual fund donors (unless otherwise advised) are noted in the Honor Roll of Donors published on an annual basis.

Alumni Relations

The Office of Alumni Relations cultivates and stewards alumni. This is a multi-generational group that currently provides the bulk of individual financial support. The age range of our alumni is driving the need for a variety of strategies to communicate with and engage them. The alumni relations effort is managed in partnership with the Cheyney University National Alumni Association.

Fundraising – The \$1 million alumni campaign articulated in the 2009 IA Plan was eagerly embraced by alumni. To date, over 60% of the goal has been achieved and they are on target to complete the campaign in 2012.

Cultivation/Engagement – The \$1 million campaign has become a foundation for robust alumni involvement in the life of the university. Alumni mentor students, host beginning of semester welcome events for students and their parents, assist in recruiting students, are building post graduate employment pipelines in industry and are seeking to increase the number of alumni who become connected to and supportive of Cheyney University.

Outreach – Alumni Relations utilizes web, online and print strategies to communicate with alumni:

- E-mail blasts are frequently used to provide campaign updates, information of alumni events and university-related news. The recipient list is expanded through the collection of data at alumni events and through mailing response vehicles.
- Alumni relations webpage provides information on chapters and events, special Homecoming activities, photo galleries and alumni “spotlights.”
- Cheyney University monthly e-newsletter and Cheyney Magazine (print) consistently feature alumni news and achievements.

Goals for 2010-15:

- Increase the number of CUNAA Chapters. While the bulk of our alumni live in the mid-Atlantic region, geographic spreading is increasing. Alumni Relations will work with CUNAA to foster chapter development where there are clusters of at least 30 engaged alumni. By 2015 there should be at least one Chapter in each state or region in which there is a cluster of at least 30 engaged alumni.
- Work with the rest of IA and with the Office of the President to identify and cultivate major gifts prospects from among alumni.
- Work with the Office of the President to ensure that the President visits current and new alumni chapters throughout the year.
- Work with young alumni to develop online affinity groups as a way to engage those alumni who have “come of age” in the social media era. By 2015 the alumni from the 1990 to the present should have tangible visibility and involvement as a result of the affinity groups.
- Work with the VP of IA and the Director of Development to schedule informational presentations on planned giving.
- Enhance the role of alumni in recruiting students to Cheyney and in the development of networks for employment after graduation. As a consequence, transform the Cheyney University student into an actively-engaged pre-alumnus who will have a lifelong relationship with the University.

Sponsored Programs

Sponsored Programs facilitates grant seeking by faculty and staff from government agencies, foundations and corporations. IA works with the rest of the University in the identification and dissemination of grant opportunities, works with faculty and staff in the submission of grants, collaborates with the principal investigators of funded grants and with the grants budget office in post-award administration, and provides education/training in grant writing and administration through workshops and online tools.

Government grant funding is becoming an increasingly important source of funding with respect to the general operating costs that can be covered via indirect cost recovery. As individual giving continues a trend of targeted philanthropy, the challenge to fund general operating costs will become significantly greater.

Sponsored Programs offers faculty a way to improve their skill set, their market value and advance their teaching career through the development of a track record in grant seeking and funding. Similarly, it is an important resource for staff wanting to build programs during tough economic times and it is of significant value to students who will be pursuing graduate school.

Goals for 2010-2015 – Expanding the Culture of Grantmanship:

- Increase education and training by employing user-friendly modalities.
 1. Work with the University's Center for the Advancement, Teaching, Learning and Assessment (CATLA) to conduct grant writing and grant management workshops.
 2. Develop strategies to drive traffic to the Sponsored Programs website which provides grant opportunities, tutorials, resource links and tools. The site is functional but faculty and staff are not all cognizant of it and/or in the habit of active engagement. This will involve collaboration with Public Relations, Academic Affairs, HR and the Office of the President.
- Increase grant writing assistance through the utilization of Title III funds to expand the current pool of external grant writers so that each Dean has a dedicated grant writer (2 for Arts and Sciences). Track the activity of the external writers so that grant-seeking and funding increases each year with respect to amount of funds secured, the number of faculty and grants seeking grants and the number of activities and programs involved including (but not limited to):
 1. Keystone Honors Academy
 2. Call Me MISTER
 3. Center of Excellence in Humanities and Communication Arts
 4. Center of Excellence in Natural and Applied Sciences
 5. University College
 6. Historic Preservation
- Work with the President and the Provost to seed/create an internal Request for Proposals process for faculty/staff innovation.
- Work with Academic Affairs to build a culture of commercialization/technology transfer which engages researchers in seeking funds for applied research.
- Enhance recognition of grant seeking and funding by complementing recognition ceremonies with faculty and staff "spotlight" articles in print and on the website and publishing a Sponsored Programs annual report which highlights all grant seeking and funding activities.

Public Relations and Constituent Development

Public Relations and Constituent Development plays an integral role not only in the work and mission of Institutional Advancement, but in that of the University itself. Public Relations is tasked with working with all facets of the University community in order to promote and maximize both internal and external audiences. Both audiences are interrelated; they can either support and reinforce each other or undermine each other. Positive internal and external public relations are key to instilling university pride, a reputation of a university worthy of investment and consequently donor confidence and satisfaction.

Internal Relations:

- Bi-weekly News and Information electronic communication to highlight University events, activities and achievements.
- Monthly e-newsletter which combines news, feature articles, photo essays and calendars to showcase all that is being accomplished at Cheyney University.
- Collaboration on publication of Cheyney Magazine each semester which reinforces the monthly newsletter externally via wide dissemination to alumni, donors, the corporate and foundation communities and legislators/leaders.
- Photographic coverage of events on campus which are published in electronic photo albums on the website.
- Ongoing communications about various initiatives in order to build internal support.
- Facilitate a cross-departmental Media Relations Committee that establishes institutional priorities for public relations and marketing.

External Relations:

- This Week at CU informational update for State System-wide electronic distribution.
- Monthly e-newsletter which combines news, feature articles, photo essays and calendars to showcase all that is being accomplished at Cheyney University.
- Photographic and/or written internal coverage of events and activities for external distribution to print, web and radio.
- Continuous outreach to editors and reporters.
- Engaging faculty and staff who can speak as quotable experts on newsworthy events covered by the media.
- Work with fellow members of the Media Relations Committee to formulate public relations and marketing messages that will maximize desired outcomes.

Goals for 2010-2015:

- Continue efforts to build a comprehensive speakers bureau that in itself can become a marketing tool for Public Relations, Academic Affairs and the University itself.
- Work with Humanities and Communications faculty to identify talented students who are interested in advancing their skills as writers, photographers and interviewers in order to support Public Relations' efforts.
- Continue cultivating relationships with reporters and editors through ongoing communications as well as personal visits with the University President as well as key staff and/or Trustees. Maximize signature events such as groundbreaking ceremonies to attract media participation through press conferences.
- Engage editors and reporters in reporting about University initiatives and/or milestones via presentations at the Urban Site.
- Work with faculty and administration to build recognition for signature programs such as the Keystone Honors Academy, Call Me MISTER, Centers of Excellence and cultural events designed to engage the surrounding townships/communities.
- Expand external coverage to include national media of renown ranging from journals such as Chronicle of Higher Education to popular magazines and websites.
- Increase the use of the University website to tell compelling stories about Cheyney University and its students, alumni, faculty and staff through feature articles.
- Build the brand of the University and its public relations efforts through submissions of materials to competitions such as those sponsored by CASE.
- Continue to create messages that highlight the ways in which the University is connected to the surrounding communities and responds to the needs of the region.

Affiliated 501(C)(3) Organizations – “It Takes a Village”

Cheyney University, the smallest in student population of the 14 PASSHE member institutions, is more resource-challenged than ever in light of this year's 18% budget cut. The University, while tax exempt, is not a 501(C)(3) organization. Because the University is an instrumentality of the Commonwealth of Pennsylvania, it is bound to rules and regulations that put it at a disadvantage when it comes to competing with state-related or private universities that can act with rapid-fire agility and flexibility. It is for these reasons that institutions such as Cheyney University develop formal relationships with non-profit affiliated entities. Many corporations and institutional donors are restricted in their giving to 501(C)(3) organizations. Affiliated non-profits play a critical role by facilitating support of the University by these donors in a way that meets their requirements. Similarly, affiliated organizations can be valued partners when it comes to initiatives or acquisitions requiring real-time response not possible for government entities.

Cheyney University has three such affiliated entities – The Cheyney Foundation, the Cheyney University National Alumni Association and the “C” Club (athletic booster organization). Together the four entities form a powerful “village” of interests that seek to both singularly and as a group continue to grow and evolve in order to ensure a vibrant future for Cheyney University.

In Conclusion – A Look Ahead

This document comes at a critical time in Cheyney University's history. Cheyney University is boldly envisioning a near future with a new residence hall, a new science center, continued historic preservation of treasured assets, and a growing student population spurred in part by a re-purposed Center City campus that will engage non-traditional students. Yet these bold dreams are now tempered by a persistently weakened economy which has negatively impacted our funding from the Commonwealth and has suppressed philanthropy which had been growing at a robust rate.

Cheyney University is about to celebrate its 175th anniversary – a singular achievement of significant proportion. The cultivation, engagement and public relations efforts that are described in this document are designed to sustain Cheyney University during this challenging time. More importantly, this document represents Institutional Advancement's commitment to helping position Cheyney University to use the 175th anniversary as a springboard for the vibrant future that will be possible when the economy has rebounded. Ultimately, the goal is for Cheyney University to be an international beacon of access, opportunity and excellence that thrives for the next 175 years.