

Lock Haven University of Pennsylvania
University Advancement Division
Development Office

STRATEGIC PLAN SUMMARY

July 1, 2008

MISSION

The Development Office
builds a compelling case for choice and support of Lock Haven University (LHU)
among all of its constituents by communicating and advocating
for the university's distinctive position, role, and contributions,
thereby forging relationships and securing commitments
required to advance the institution's overarching mission and priorities.

VISION

Our vision is to be recognized for a pivotal leadership role in:

- Building an endowment that underwrites and ensures the success of the university's quest for excellence and distinction.
- Positioning LHU as steward of the region's future and human capital, worthy of regional business and industry support and collaboration
- Cultivating the university's most valuable and powerful strategic relationships among business, community, educational, cultural, and political leaders
- Planning and executing history-making, record-breaking annual, comprehensive and capital campaigns

VALUES

With a spirit of professionalism, and in an environment that encourages teamwork and personal growth, the Development Office commits to these values:

- ***Excellence*** — We take pride in our work and strive for the highest quality.
- ***Innovation*** — We empower ourselves and others to be risk-takers and reach beyond the current paradigm; we are open to change and creative new ideas in fulfilling our mission.
- ***Continuous Learning*** — We understand the principles and concepts underlying our work and take initiative to learn and inform others of "best practices" within our varied disciplines.
- ***Transparency and Accountability*** — As stewards of the public trust, we ensure that promises to our supporters are fulfilled and hold ourselves accountable for using our resources wisely.
- ***Ethical Action*** — We adhere to high ethical standards; we build relationships based on trust, honesty and integrity; and we respect privacy and confidentiality.

Context and Alignment with Lock Haven University's Strategic Plan

The Development Office is a component of the University Advancement (UA) division, a cabinet-level division comprising the following functions: Fundraising (including Major gifts, Corporate & Foundation Relations, Planned Giving, and Annual Campaign); Alumni Relations; Public Relations; and Admissions.

As a division, UA is responsible for leading and coordinating efforts to achieve Goal 8 of the University's Strategic Plan—Develop Additional External Resources: The University cultivates and develops new and existing donor prospects to achieve fundraising goals. The Development Office is primarily responsible for setting and achieving fundraising goals set under the University's strategic plan.

Primary Goals and Accountability

The Development Office's core objective is to build a compelling case for choice and support of LHU among friends, alumni, donors, prospective students and influencers, legislators, employers, voters and regional citizens. Thus, its activities revolve around creating and building relationships that provide support for the university in multiple ways, and the contextual activities and infrastructure required for building these strategic relationships. To this end, the Development Office has identified three primary goals:

- I. Serve as champion and steward of the university's future by building professional capacity, competence, and capabilities.
- II. Advance the university's mission, objectives, and interests by strategically cultivating, developing, and maintaining relationships with key constituents that lead to increased financial support of the university.
- III. Plan and implement campaigns and fundraising projects in support of the university.

Opportunities, Challenges, and Measures and Indicators of Success

The opportunities and challenges for each UA goal, together with suggested measures or indicators for achieving each goal follow:

I. Serve as champion and steward of the university's future by building professional capacity, competence, and capabilities.

A. Infrastructure & Tools for Effective Relationship Management — LHU stands to benefit immensely from its many valuable existing and potential connections and relationships, which together embody present and potential resources and support required to strengthen and transform the institution. To capitalize upon this potential and the extraordinary support opportunities they represent requires the professional infrastructure, systems, and capabilities

required to safeguard, manage, and make the most effective and strategic use of information regarding these relationships.

Measures and/or Indicators of Success:

- Increased efficiency and use of the LHU Foundation's database and fundraising tools.
- Conservation of fiscal resources through increased efficiency in mailing processes.

B. Professional Development — Fundraising and advancement professionals are constantly under pressure to achieve record successes each year. Through annual training and professional development at conferences and workshops, skills are constantly honed and new techniques are explored and implemented.

Measures and/or Indicators of Success:

- New fundraising and solicitation ideas are brought to the table each year.
- Each professional in the office attends at least one professional development conference or training event each year.

II. Advance the university's mission, objectives, and interests by strategically cultivating, developing, and maintaining relationships with key constituents that lead to increased financial support of the university.

Plans and Processes to Build Strategic Relationships — LHU's greatest potential for enhanced visibility and increased support hinges on its ability to engage in and deliver on the expectations of its constituents. To realize the benefits of the many strategic opportunities that exist, the university must develop stewardship plans and programs with the level of coherency, sophistication, and integration required to rationalize, prioritize, and most effectively capitalize upon its many high-potential relationships and opportunities.

Measures and/or Indicators of Success:

- Successfully raise \$2.75 million in total giving in fiscal year 2009, with specific goals of annual giving of at least \$160,000, athletic fundraising of \$ 215,000, and planned giving of \$250,000.
- Increase alumni participation rate to at least 17%.
- Increase number of donors by 5%.
- Achieve target number of one-on-one visits with past and prospective donors
- Achieve target number of development events and donors, with 25% of prospects attending events
- Achieve target for number of gifts of \$10,000+, size of average gifts of \$1,000 and less, and amount of overall giving (gifts and pledges)

III. Plan and implement campaigns and fundraising projects in support of the university.

Strategic Programs and Activities to Foster Affinity & Support — The most effective and powerful means of advancing the university's mission, objectives, and interests is by engaging in meaningful and strategic external connections, relationships, and initiatives, as well as by raising awareness internally about the importance and most effective means of identifying, fostering, building and sustaining such relationships.

Measures and/or Indicators of Success:

— Completion of feasibility study for a comprehensive fundraising campaign by February 1, 2009, including:

- key fundraising priorities;
- fundraising dollar and donor goals; and
- budget and campaign plan

Last Reviewed: November 3, 2008