



SAINT AUGUSTINE'S
UNIVERSITY

Transform. Excel. Lead.

**INSTITUTIONAL ADVANCEMENT
DEPARTMENT FUNDRAISING AND RESOURCE
DEVELOPMENT STRATEGIC PLAN**

2018-2021



OVERVIEW

Since the start of the administration of Dr. Everett B. Ward in 2014, the Institutional Advancement Department has been committed to the growth of the university and building long-term relationships with alumni, the Episcopal Church, corporations and other constituencies of Saint Augustine's University. The department assumes responsibility for gifts and grants, alumni affairs, sponsored research programs and cultivation of future donors to the university. The department is focused on the three following cornerstones:

1. Returning the institution to financial stability.
2. Strengthening the faith of students, employees and alumni in the viability of the institution.
3. Engaging the community and corporate stakeholders for mutually beneficial partnerships and collaborations.

THE VISION STATEMENT OF SAINT AUGUSTINE'S UNIVERSITY

Saint Augustine's University is nationally recognized as a comprehensive institution with high performing students, renowned faculty, focused community engagement, and a strong alumni base of change agents.

THE MISSION STATEMENT OF SAINT AUGUSTINE'S UNIVERSITY

Saint Augustine's University's mission is to sustain a learning community in which students can prepare academically, socially and spiritually for leadership in a complex, diverse and rapidly changing world.

THE MISSION OF THE INSTITUTIONAL ADVANCEMENT DEPARTMENT

The Institutional Advancement Department is responsible for the philanthropic growth of the university and seeks to advance public understanding, build and strengthen long-term relationships, and enhance financial support of the university.

Saint Augustine's University has demonstrated over the past four fiscal years that it has the capacity to increase revenue from philanthropic support from a broad base of donors. The level of improvement is validated by a significant increase in revenue from \$814,765 in gifts in fiscal year (FY) 2015 to \$2,433,996.24 fiscal year (FY) 2018. The number of donors increased from 912 to 2,339 over the same period.

The primary, and readily identifiable, sources of projected gift revenue are alumni and other individuals, various individual Episcopal Churches, the Dioceses, and community and corporate organizations. Additional support from foundations will be sought. This assistance will be pursued using appeals that are more focused in scope that stress Saint Augustine's distinctive attributes and value to the community and prospective donors.

The University will increase support from potential high-end donors using customized approaches designed to build more substantive long-term relationships. The University will also initiate tactics to increase gift levels among the most promising lower level contributors. This includes increasing alumni giving participation to at least 25% over the next three to five years.

An important intentional and core objective of the fundraising plan is strengthening the relationship and financial support of the Episcopal Church. This assistance is crucial in achieving greater national and international awareness of the University and its vital mission. Successfully achieving this objective holds significant promise and opportunity for Saint Augustine's to continue growth in advocacy and contributions from the Church and among parishioners. The University will be intentional in leveraging its special status as a North Carolina baccalaureate (bachelor degree offering) institution with official Episcopal Church affiliation and one of only two HBCU's nationally with such an affiliation. Saint Augustine's will communicate more broadly the alignment of its mission and values with those of the Church.

The University has also committed to a goal of improving the effectiveness of expenditures related to fundraising. This goal relates to increasing profitability of expenditures to ensure that the scarce resources are being utilized to the greatest effect in achieving fundraising goals. A review of all fundraising events is underway to identify opportunities for strengthening and streamlining events.

Initial Strategy and Tactics toward Achieving Fundraising Goals

For the 2018-19 fiscal year the fundraising campaign goal is \$2,750,000, a 19% increase compared to FY 2018 gift revenue. This goal will be achieved through a consolidated annual giving campaign that primarily seeks support for unrestricted funding, scholarships and other restricted funding, and first-stage capital funding for the George Williams Athletic Complex. A guiding strategy, and complimentary implementation tactic, will be to first pursue major gifts from the top 100 qualified high priority donors. This strategy is an effort to secure at least 60 to 75% of the fundraising goal from the most generous and committed donors. Aggressive cultivation and solicitation of top donors and prospects is to be undertaken as a major institutional priority over the first two quarters of the fiscal year.

A proven disciplined approach will be used to help focus and energize the

fundraising effort. Following a process of prospect research, top donors will be identified and qualified as to their level of interest in providing immediate financial gifts and commitments. Prospects will be ranked in order of priority based on their level of interest and financial capacity. The ranked prospects will then be divided into manageable portfolios and assigned for cultivation and solicitation by appropriate leadership, staff and volunteer solicitors.

WHAT WE NEED YOU TO DO

We are asking our alumni, family and friends of Saint Augustine's University to support us so that we may educate and train the next generation of global leaders. However, in order to accomplish this task, we need your assistance with the following areas.

- **Returning the institution to financial stability** is of primary concern to our leadership, alumni and constituents. Since April 23, 2014, the university has undertaken various fundraising activities aimed at increasing the visibility of the students, faculty, staff and administration of Saint Augustine's University, while highlighting the Historic campus buildings and facilities.
- **Strengthening the faith of students, employees and alumni in the viability of the institution** by working with the University Chaplain, Office of the President, each of the Departments of Saint Augustine's University and the National Alumni Association.
- **Engaging the community and corporate stakeholders for mutually beneficial partnerships and collaborations.** This will be accomplished through development initiatives, which include outreach and engagement of local, state, regional and national entities. In addition, full operationalization of The Episcopal Church Engagement Plan will be initiated during the year.

WHAT WE HAVE TO DO THROUGH OUR ADVANCEMENT GOALS AND OBJECTIVES

The Institutional Advancement Department has developed this strategic plan to guide its friend and fundraising efforts, identify and develop new revenue sources and in-kind donations and promote the mission, goals and objectives of Saint Augustine's University.

Over the next three years, Saint Augustine's University's Institutional Advancement Department will utilize a variety of objectives and action steps to meet or exceed the following

Goals:

- 1. **Defend the Base** - this defense includes *retaining current donors* through accountability and transparency with our stakeholders, while providing a higher level of stewardship and customer service.
- 1. **Extend the Base** - extending the base refers *obtaining new donors* by initiating fundraising efforts that go beyond what has traditionally and historically been done at Saint Augustine’s University.
- 2. **Unlock New Opportunities** - unlocking new opportunities that include *encouraging donors to increase their donations, identifying and engaging new corporate and community partnerships and operationalizing The Episcopal Church Engagement Plan* to provide an opening into untapped resources as well optimizing support from those that were identified previously to ensure the sustainability of the university.

A RECAP of FISCAL YEAR 2017-2018

Fundraising Campaign Donations Received July 1, 2017 to June 30, 2018 \$2,904,256.00	
Annual Campaign	\$ 2,904,256.00
Donations toward Annual Giving	\$ 1,667,626.95
Donations toward Scholarship	\$ 695,304.10
Donations from Special Gifts	\$ 191,359.13
In-Kind	\$ 349,965.82
Total Donations	\$ 2,904,256.00

During this year, the overall goal for all fundraising campaigns was \$4 million dollars. This equated to \$2,000,000 to be raised for Annual Giving (this includes Annual Fund Giving, Special Gifts and Scholarship) and the Episcopal Church campaign was to include Church and Dioceses gifts in the amount of \$2,000,000.

Through Annual Giving campaigns, the university raised in excess of \$2.4 million-dollars through several fundraising initiatives, events and projects. Each initiative had distinctive marketing materials. Donors were identified and engaged to support, to the extent possible, various campaign objectives that were aligned with their interests and giving history. This strategy is helping to limit donor fatigue for those who consistently give to the university and to prevent multiple “ASKS” of newly cultivated donors.

Support from the Episcopal Church campaigns experienced a 44% increase in dollars received from parishes and dioceses in FY 2017-18 compared to FY 2016-17. The total received in FY 2018 was a 935% greater than support received in FY 2016. The FY 2018 Episcopal Church goal of \$2,000,000 included a proposed \$1,500,000 grant and/or loan from the Domestic and Foreign Missionary Society for assistance with technical, information technology and administrative support. This grant/loan was not secured, which was the determining factor in the University not reaching the proposed \$2 million Episcopal Church goal. In the current fiscal year, the projected increase in giving from the various Episcopal Churches and Dioceses is reflected as a portion of overall Annual Fund donations. A detailed report of annual fund giving, including support from the Church, will be prepared and made available to all stakeholders.

A promising development from the General Convention of the Episcopal Church in July of 2018, was that Saint Augustine's University received funding in the amount of \$822,500 for the fiscal years 2018-2019 and 2019-2020, and \$200,000 in funding for strategic assistance which will be distributed once a written plan is submitted for approval by the Executive Council of the Episcopal Church.

FUNDRAISING GOALS FISCAL YEARS 2018-2021

Fundraising Campaign Goals July 1, 2018 to June 30, 2019 \$2.75 million Goal

Annual Campaign	\$ 1,600,000
Donations toward Annual Giving	1,200,000
Donations toward Scholarship	300,000
Donations from Special Gifts	100,000
Episcopal Church	\$ 650,000
Church and Diocese Visits	
George Williams Athletic Complex	\$ 500,000
Corporate and Civic Sponsorships	
Total	\$ 2,750,000

Fundraising Campaign Goals July 1, 2019 to June 30, 2020 \$3.1 million Goal

Annual Campaign Goal	\$ 2,662,000
Donations toward Annual Giving	1,800,000
Donations toward Scholarships	662,000
Donations from Special Gifts	200,000
Capital Facilities Improvements	\$ 500,000
Total	\$ 3,162,000

Fundraising Campaign Goals July 1, 2020 to June 30, 2021 \$3.8 million Goal

Annual Campaign Goal	\$ 2,875,000
Donations toward Annual Giving	2,000,000
Donations toward Scholarship	785,000
Donations from Special Gifts	100,000
Capital Facilities Improvements	\$ 1,000,000
Total	\$ 3,875,000

FISCAL YEAR 2018-2019

GOALS/OBJECTIVES/ACTION STEPS

Goal #1. Defend the Base - this defense includes *retaining current donors* through accountability and transparency with our stakeholders.

Objective 1.1 Strengthen our donor stewardship program.

Objective 1.2 Continue to use transparency and accuracy in reporting.

Objective 1.3 Continue to offer exemplary customer service.

Goal	Objective	Action Steps	
Goal 1	1.1 Strengthen our donor stewardship program	<ol style="list-style-type: none"> 1. Hold a donor appreciation event on campus. 2. Improve timeliness of acknowledgements to donors. Call all donors contributing \$1,000 + 3. End-of-year tax letter 4. Send donor holiday cards by December 10 5. Send donor gifts 	<p>Provide an acknowledgements within 7 days of receiving a donation</p> <p>Provide end of year tax letter by Feb. 15th each year</p> <p>Distribute to all donors by Dec. 10th each year</p> <p>Send donor gifts based on giving levels</p>
Goal 1	1.2 Continue to use transparency and accuracy in reporting	<ol style="list-style-type: none"> 1. Provide Annual Philanthropy Report 2. Report to Scholarship Account Donors 	<p>Produced and distributed by end of first quarter</p> <p>Produced and distributed in first quarter of each fiscal year</p>
Goal 1	1.3 Continue to offer exemplary customer service.	<ol style="list-style-type: none"> 1. Provide donation receipts in a timely manner 2. Respond to donor requests 	<p>Receipt letter provided within 2 weeks of donation.</p> <p>Responses within 8 hours to call Responses within 4 hours to email</p>

GOALS/OBJECTIVES/ACTION STEPS

Goal #2. Extend the Base - extending the base refers ***obtaining new donors*** by initiating new fundraising efforts that go beyond what has traditionally and historically been done at Saint Augustine’s University. _

- Objective 2.1** Educate and engage alumni.
- Objective 2.2** Make Saint Augustine’s University better known to The Episcopal Church in NYC.
- Objective 2.3** Create new corporate partnerships.
- Objective 2.4** Encourage students to be philanthropic in support of their school.
- Objective 2.5** Grow SAU Board of Trustees personal giving and assistance plan. Give and Get Plan.

Goal	Objective	Action Steps	Metrics
Goal 2	2.1 Educate and engage young alumni.	<div><div>1. Establish networking opportunities</div><div>2. Develop social media connections</div><div>3. Provide diverse donation options</div><div>4. Listen to the alumni</div><div>5. Offer volunteer opportunities</div><div>6. Share the Advancement Giving Guide</div></div>	<div>Two per fiscal year off campus</div> <div>Connect with and engage 20 young alumni leaders per fiscal year</div> <div>Increase Text2Give and other alternative donations by 10%</div> <div>Provide 2 structured opportunities to share feedback during the fiscal year, and other feedback channels</div> <div>Provide 3 opportunities to volunteer in various capacities on campus</div> <div>Post online and distribute via email ongoing</div>

Goal 2	2.2 Make Saint Augustine's University better known to The Episcopal Church	<ol style="list-style-type: none"> 1. University newsletter distribution 2. Establish a presence at Church activities, events 3. Invite Episcopalian leaders to campus events, luncheons and speaker opportunities 4. Train Episcopalian leaders to be ambassadors on the university's behalf 5. Share the "How to host a SAU Fundraiser" brochure 	<p>Send out quarterly</p> <p>Be a part of at least 4 external church related activities/events</p> <p>One per semester</p> <p>Offer 2 trainings per year and provide Episcopalian leaders with printed university materials</p> <p>Each ambassador will receive one brochure</p>
Goal 2	2.3 Create new corporate partnerships.	<ol style="list-style-type: none"> 1. Attend Raleigh Chamber of Commerce events 2. Hold a business leaders' luncheon or other activity 	<p>Attend four events per year</p> <p>Invite at least 10 corporations that are not currently donors. Recruit corporate donors/ ambassadors and volunteers to help increase awareness and support</p>
Goal 2	2.4 Encourage students to develop a culture of philanthropy in support of their school.	<ol style="list-style-type: none"> 1. Educate them on philanthropy 2. Encourage students to participate in the Dollar\$ for \$cholars campaign 	<p>Hold 2 workshops per year for student leaders on philanthropy</p> <p>Raise \$2,000</p>

Goal 2	2.5 Grow SAU Board of Trustees personal giving and assistance plan.	1. Members give minimum of \$10,000 per Board vote in Spring 2018 2. Members get donations from friends and associates	Raise \$180,000 Raise \$ 90,000 Total \$270,000
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GOALS/OBJECTIVES/ACTION STEPS

Goal #3. Unlock New Opportunities - unlocking new opportunities includes ***encouraging donors to increase their donations*** with legacy programs and improved recognition and visibility.

Objective 3.1 Implement matching gifts program.

Objective 3.2 Implement planned giving program.

Objective 3.3 Offer visible donor recognition.

Goal	Objective	Action Steps	
Goal 3	3.1 Maximize matching gifts program	1. Determine eligible donors and educate them and others with marketing materials	Ongoing conversation about how to double the donation and publicize the opportunity.
Goal 3	3.2 Implement planned giving program	1. Determine the highest priority prospects. Educate prospects with planned materials, giving seminars 2. Explore the feasibility of The Episcopal Church planned giving program	Hold 3 seminars, and distribute two planned giving mailings annually. Meet monthly with those among top 10% of priority prospects.

Goal 3	3.3 Offer visible donor recognition	<ol style="list-style-type: none"> 1. Distribute an annual report that lists donors by society levels 2. Purchase an electronic donor recognition sign 3. Hold exclusive donor VIP event at Stone of Hope Gala. Provide top donors with special nametags, etc. 4. Post donor society listing online monthly 	<p>On an annual basis</p> <p>Update donor listing monthly</p>
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EPISCOPAL CHURCH ENGAGEMENT

Saint Augustine's University is an institution of higher learning that is affiliated with the Episcopal Church. The historical heritage of the institution, being established by Episcopal missionaries, has informed how students are educated at Saint Augustine's University. Episcopal education is designed to form the entire person – mind, body, and faith formation.

The Institutional Advancement Department desires to collaborate with Dioceses, parishes and congregants within the Episcopal Church (as well as Provinces throughout the Anglican Community). Our Engagement with the Episcopal Church is to bring a stronger presence of Episcopal stakeholders to the campus as well as the University's own witness beyond her gates.

The desire to have ordained Episcopal clergy (Bishops, priests and deacons) on the campus to assist the University Chaplain and academic administration in fostering strong Episcopal presence both physically and through teaching pedagogy. We believe that visiting fellows will also assist in attracting potential students who identify as being members of the Episcopal Church. Our desire is to increase the number of Episcopalians into a community who are already familiar to the Episcopal ethos.

Below you will find several initiatives that will guide our engagement with Episcopal communities to support Saint Augustine's University.

Henry Beard Delany Teaching/Preaching/Lecturing Fellowship – Episcopal Bishop Speaking Series focused on the Black Empowerment,

Education, Episcopal Church, (Architecture); **done in conjunction with the 50th Anniversary of the UBE. This can be a way to engage UBE and to ask for funding during this coming year**

- Rt. Rev. Jennifer Baskerville Burrows – Indianapolis
- Most Rev. Michael Curry – Presiding Bishop, Episcopal Church
- Rt. Rev. E. Ambrose Gumbs – Virgin Islands
- Bishop-elect Carlyle Hughes – Newark
- Rt. Rev. Julio Murray – Archbishop of Central America; Bishop of Panama
- Rt. Rev. Eugene Sutton – Maryland
- Rt. Rev. Carl Wright – Federal Ministries
- Rt. Rev. Robert Wright – Atlanta
- Rt. Rev. Laish Zane Boyd Sr. – Anglican Diocese of the Bahamas & The Turks and Caicos Islands

“UBE Teaching/Preaching/Lecturing Fellowship” – funded fellowships (minimum of 2 clerics/semester); working with the Office of Black Ministries, UBE, Episcopal Seminaries and Anglican Studies programs to engage with Episcopal campus community

- Continuing Education
- Clergy in discernment
- “Recently” ordained
- Sabbatical time

Establish Murray Curry Scholars – scholarships for confirmed and active students from the Episcopal dioceses within the state of North Carolina (North Carolina, Western North Carolina, and East Carolina)

- Scholarship named after “First” African Americans within/from North Carolina
 - **Rev. Pauli Murray, SJD** was the first African American woman ordained a priest in the Episcopal Church who was raised in Durham, NC
 - **Most Rev. Michael B. Curry**, the first African American Diocesan Bishop in the Diocese of North Carolina and the 27th Presiding Bishop of the Episcopal Church

CAPITAL INITIATIVES

- Saint Augustine’s Chapel – focus on parishes in the Diocese of North Carolina and the wider Church to procure resources for:
 - New Organ
 - Enhanced Sound System
 - Enhanced Technology
 - Deferred Maintenance
 - Stained Glass Windows Project

The initiatives below will guide our engagement with Episcopal communities to support Saint Augustine's University in North Carolina.

Grant Proposal to Christ Church Charlotte - This follow-up initiative will be accomplished by conversation with parish leaders to determine ways to nurture the relationship between Christ Church Charlotte and Saint Augustine's University so that lay leadership will become more invested in Saint Augustine's University as an Episcopal Institution which promotes the missional objectives of the Diocese and the Episcopal Church at large.

Collaborate with the SAU Marketing and Communications Department - This initiative's goal is to develop a Church related donor newsletter emphasizing the achievements and activities of Episcopal students both within the Saint Augustine's University campus community and within the larger society in areas of servant leadership, academic achievement, and spiritual formation. The newsletter will demonstrate student religious life connectivity to the priorities of the Episcopal Church.

Parish Engagement - Explore ways to reach other parishes in metropolitan areas such as the Triangle for a fundraiser. Parishes where we should further our relationship will be Chapel of the Cross, Chapel Hill, Saint Timothy's, Raleigh, and Saint Mark's Raleigh.

Networking - Work with the Bishops of the Diocese of NC to determine ways to enhance Saint Augustine's University's relationship with untouched parishes outside of the metropolitan areas of Charlotte, the Triad, and the Triangle.

Implementaion of the Strategic plan occurs through the following Offices:

- Alumni Affairs (Mrs. Sheryl Ximines)
- Corporate Development (Dr. Steven E. Hairston and Ms. Candice Murray)
- Community Development (Dr. Steven E. Hairston and Ms. Candice Murray)
- Church Relations (Rev. Charles L. Fischer III and Mother Nita Byrd)
- Donor Relations and Database Management (Mrs. Jenna Andreasen)
- Foundation Relations(Rev. Charles L. Fischer III and Dr. Linda Gunn-Jones)
- Sponsored Research (Dr. Booker T. Anthony and Dr. Linda Gunn-Jones)

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