



Strategic Plan
University of Vermont Foundation
July 1, 2021 – June 30, 2026

PREAMBLE

Philanthropy is investment in the betterment of our world. It enables the best minds to inspire action, leads to change, and provides access in myriad ways for people to learn, grow, heal, and contribute to our collective society – locally and across the globe.

The University of Vermont Foundation is engaged in this noble work in collaboration with the University of Vermont, the University of Vermont Medical Center and its Foundation, and the University of Vermont Health Network. We bring people together –donors, students, alumni, faculty and staff, clinicians, researchers and patients - such that the magic of higher education, research and the delivery of innovative healthcare raise us all up.

We partner with people and organizations so that their investments create a better world for all – for generations to come. The funds we raise prepare future leaders who will change our world through their thoughts and actions, and support the minds and hands saving lives in our communities every day.

This document lays out how the UVM Foundation will help the University and its partners achieve their aspirations over the next five years.

MISSION

The mission of the UVM Foundation is to secure and manage private support for the benefit of the University of Vermont.

VISION

The Vision of the UVM Foundation is to foster long-term relationships to maximize philanthropic investments in the University of Vermont, toward the realization of the University's priorities and aspirations.

VALUES

The UVM Foundation follows our PRIDE values and Commitment to Diversity, Equity, and Inclusion.

Professionalism: As representatives of the UVM Foundation, we exemplify the highest standards of our profession in our work, expertise, and conduct.

Respect: In everything we do, we demonstrate consideration of the needs of our alumni and donors, of the campus community, and of each other.

Integrity: We are fair, honest, and ethical in our work and straightforward and sincere in our interactions with others.

Dedication: We are dedicated to responsibly stewarding the important relationships our alumni and donors have with UVM and inspiring a culture of meaningful engagement and philanthropy.

Excellence: We strive for excellence in ourselves by being innovative in our actions, passionate about our work, supportive of our colleagues, and devoted to professional development and personal growth.

Our Commitment to Diversity, Equity, and Inclusion

The UVM Foundation is dedicated to improving our organization by better reflecting the diversity of alumni and students, faculty, and ultimately the university we serve. We are committed to building an environment that values, welcomes, and supports equity and inclusiveness for people of all backgrounds, orientations, identities, ages, and abilities, and we are taking active steps to meet this commitment.

Fundraising and Donor Engagement

Goals:

- Grow our annual fundraising production for UVM and the UVM Medical Center (UVMMC) to a sustainable \$100M/year by FY26.
- Grow the pipeline of future major donors.

Success Measures:

- Track progress in annual commitments to the University of Vermont and the University of Vermont Medical Center. Track detail by organization, gift level, and purpose.
 - The three-year trailing average trendline will reach \$100M by the end of FY26.
 - Target distribution:
 - 50% from commitments of \$1M+
 - 30% from commitments of \$100K+
 - 10% from commitments of \$25K+
 - 10% from commitments of less than \$25K
- Track key metrics associated with prospect readiness – engagement scores, major gift predictive scores, and giving.
 - Increase the number of prospects rated \$100K+ who are ready for management from 600 in FY21 to 900 by FY26– a 50% increase over FY21 levels.
 - Prospect readiness is indicated by engagement scores of 3+, major gift predictive scores in the top two quartiles of the scoring model, and recent giving of \$250 or more.

Strategies:

- Structure and resource fundraising teams to maximize fundraising success.
 - Grow our Principal Gifts, Major Gifts, and Leadership Annual Giving resources.
 - Organize our frontline fundraising team into a laser-focused money raising team.
 - Align corporate and foundation relations programs with Principal Gifts to focus on large opportunities.
 - Assign resources and expertise to provide planned giving support to front-line fundraisers.
- Structure fundraiser portfolios to maximize fundraising success.
- Use donor-centered approaches while focusing on the University's and Medical Center's stated priorities.
- Employ a Core Audience model to structure our work and allocate resources.
- Strengthen and support a comprehensive board and volunteer engagement program.
- Work with senior administrators, deans, department chairs, and select faculty to build relationships with current and prospective donors.
- Forge strong cross-organizational collaboration to optimize prospect qualification, cultivation, and stewardship within the Foundation teams.
- Strengthen the collaboration between UVMF and UVMMC related to shared prospects to maximize their investments in both organizations over time.
- Create data and reporting infrastructure to support the goals listed above.
 - Analytics to identify and track target populations.
 - Dashboards to track progress with key metrics.

Alumni (Current and Future) Engagement

Goals:

- Engage a diverse body of cross-generational alumni that contributes their time, talents, and treasure to UVM. This constituency is our current and future pipeline of major donors.

Success Measures:

- Increased average alumni engagement scores (0-5):
 - Alumni 1-10 years from graduation: from 1.2 to 1.5 by end of FY26
 - Alumni 11-20 years from graduation: from .6 to 1.2 by end of FY26
 - Prospects rated \$25K and above: from 2.8 to 3.5 by end of FY26
- Annual increase in the number of *total* alumni donors: from 8,786 in FY21 to 9,800 in FY26
- Annual increase in donor retention:
 - Green Mountain Circle Donors: from 78% in FY21 to 90% in FY26
 - Other prior-year donors: from 42% in FY21 to 50% in FY26.
- Annual increase in average alumni gift (under \$10,000): from \$567 in FY21 to \$625 by end of FY26
- Increased representation of young and diverse alumni in leadership and volunteer roles (baseline numbers and specific targets to be established in FY22).
- Increased number of active, tracked volunteers:
 - Career – from 125 in FY21 to 500 by end of FY26
 - Admissions – from 896 in FY21 to 1,800 by end of FY26

Strategies:

- Increase collaboration and integration of Foundation activities with the respective boards of the UVM Alumni Association with UVM Medical Alumni Association.
- Increase the portion of engagement data that is entered into the CRM.
- Provide compelling and relevant engagement opportunities through events, volunteerism, communications, and networking.
- Actively partner with campus stakeholders for volunteer, admissions and internship opportunities.
- Utilize communications platforms to educate constituents about the mission and vision of the UVM Foundation and UVM Alumni Association and the impact of philanthropy on the University.
- Gather information regarding alumni areas of interest.

Campus Engagement

Goals:

- The UVM Foundation maintains an intentional, efficient, and coordinated method for working with campus partners and programs.
- Key campus partners (Deans, Administration, Faculty) understand the contributions philanthropy and alumni engagement have made and can make to the University and its students, faculty, and staff.
- Campus partners actively participate in engagement, fundraising, and volunteer activities.

Success Measures: (These measures will be survey based)

- Campus partners provide description of impact of philanthropy for 100% of stewarded donor funds.
- University partners have knowledge of who to contact within the Foundation regarding questions or issues for each campus unit.
- Foundation staff have knowledge of who campus inquiries should be referred to within the Foundation for quick response and actions.
- 100% of Foundation staff have knowledge of our campus and UVM med center fundraising priorities and can articulate our case for support.

Strategies:

- Assign lead relationship managers who are responsible for Foundation internal coordination for each major campus unit or program.
- Develop "Advancement/Foundation 101" presentation and conduct trainings for staff, deans, department leaders, and key administrators.
- Enhance our fund usage and stewardship policies and processes in collaboration with academic leadership.
- Develop and maintain a database of volunteer opportunities for alumni and donors in collaboration with our campus partners.
- Work with campus stakeholders to develop donor strategies and tactics to support priorities.
- Work with campus stakeholders to celebrate the impact of philanthropy.
- Facilitate implementation of best practices for "Board of Advisors" for campus partners that will maximize volunteer experiences and campus contributions.

Governance

Goals:

- Build sustainable, diverse and engaged Foundation Board of Directors, FLC and Fellows structures.

Success Measures:

- Increased number of recent graduates, non-white, and/or female members of our volunteer organizations as shown in the demographic dashboard for governance committee.
- 70% attendance rate at committee meetings by FLC and Board members.
- Improved Board engagement and satisfaction as measured by the semi-annual Board Survey.

Strategies:

- Relaunch the Foundation Fellows program to engage a diverse group of alumni 5-10 years out from graduation.
- Maintain a list of qualified Board, FLC and Fellows candidates for the Governance committee consideration.
- Actively pursue Academic Health Sciences representation on Board of Directors, FLC, and committees.
- Create a board succession plan with an eye toward desired board makeup - philanthropic capacity, diversity, affinity, industry/expertise.

Operational Excellence

Goals:

- Operate as a best-in-class organization as compared to large and mid-sized university-affiliated foundations.
- Implement a new enterprise-wide software solution that supports advancement and alumni relations activities of the organization.
- Define optimal next-phase alignment among the UVM Foundation, UVM Medical Center, and UVM Health Network for fundraising success across Academic Health Sciences.

Success Measures:

- Be in top quartile of our peer group in key benchmarks, such as cost per dollar raised, dollars raised per FTE, alumni participation rates, etc. by FY24.
- Maintain financial reserves as established by the Foundation Board of Directors each fiscal year.
- Enterprise-wide software solution is live by June 30, 2024.
- Third-party recognition of our best-in-class organization by 2025 (CASE/AGB/AAMC/AHP)
- Written plan for alignment among UVMF, UVMCC, and UVM Health Network will be endorsed by all three organizations by 2025.

Strategies:

- Create transparent endowment performance and UVM Foundation financial performance reports to hold ourselves accountable to best of class performance.
- Evaluate, reimagine, and reengineer business processes to create efficiencies and to surface data that can drive future business decisions, including the collaboration with the UVM Medical Center. Use the new software implementation process as a tool to improve our business processes.
- Create and execute a structure for the enterprise software implementation timeline, staffing, and business reengineering processes. Benchmark our operations for efficiency against large and mid-sized Advancement and Foundation organizations.
- Maintain a comprehensive and up-to-date risk management plan.
- Engage key stakeholders and leadership in an inclusive process to evaluate existing and future optimal design for the collaboration between the UVM Medical Center/UVMCC Foundation/Health Network and the UVM Foundation.

Employee Excellence and Engagement

Goals

- Become a destination employer in the field of higher education advancement where staff want to build their careers over the long term.
- DEI framework embedded within all we do: policies, practices and behaviors

Success Measures:

- Staff racial and ethnic demographics improve from 3.5% to 10% people of difference by FY26.
- Improvement in Intercultural Development Inventory (IDI) climate score, from "Minimization" to "Adaptation" by FY23
- UVMF staff recognized for excellence and leadership by our professional associations.
- Voluntary staff turnover consistently below 10% annually. UVMF average previous three years is 12.8%.

Strategies:

- Employ affirmative hiring best-practices to recruit top talent who share our values.
- Provide learning opportunities to keep staff at top of their game.
- Improve opportunities for career growth within the Foundation, UVMMC and UVMHN.
- Incorporate 360 reviews for all supervisory staff and provide management/leadership training to improve communication and performance management techniques.
- Partner with UVMMC to provide a more cohesive and unified employee experience.
- Select and implement a new HRIS system to improve data management and reporting that guides decision-making.
- Enhance recognition opportunities for employees at all levels.
- Develop and implement employee engagement opportunities that support a dynamic, thriving, people-focused workplace.
- Have Fun!

Abbreviations and Definitions

Core Audiences - Entities that are most likely to support us now in or in the future (based on philanthropic capacity or demonstrated engagement) or that are integral to our success, including campus partners.

DEI – Diversity Equity and Inclusion

Engagement score - The engagement score is a metric that is calculated for all alumni, donors, and friends in the Foundation's database. It quantifies an individual's level of engagement with the university by measuring communications, volunteerism, event participation, and philanthropic activity. Scores range from 0 to 5, where those with the highest level of engagement are assigned a score of 5.

FLC - Foundation Leadership Council

Major gift predictive score - The major gift predictive score is a metric that is calculated for all alumni, donors, and friends in the Foundation's database. The score is based on statistical modeling that predicts the likelihood that an individual will go on to become a major donor to the university. Scores range from 0 to 100, where those with the highest probability of becoming a major donor are in the upper two quartiles of the range - with scores of 50-100.

Trailing average – A trailing average (or a moving average) is a statistical calculation that creates a series of averages of subsets of a full dataset. This calculation can be used with time series data to smooth fluctuations and to reveal the underlying trend. A three-year trailing average calculates an average for successive three-year time periods.

UVM - The University of Vermont

UVMAA - The University of Vermont Alumni Association

UVMF - The University of Vermont Foundation

UVMHN – The University of Vermont Health Network

UVMMC - The University of Vermont Medical Center

UVMMCF – The University of Vermont Medical Center Foundation