

Annual Report

Part 1

Section A

Unit Information

Unit: Advancement

Mission Statement:

The Foundation's primary responsibility is to encourage, solicit, collect, receive and administer gifts and bequests of property and funds for scientific, educational and charitable purposes, for the advancement of Florida Gulf Coast University and its objectives. In addition to the Foundation Board, the Vice President/Executive Director manages six administrative departments: Marketing and Community Relations, Athletics Gifts, Foundation Finance, Major Gifts, Alumni Relations, and Planned Giving.

Section B

Unit goals set within last year's (2003-2004) Annual Report

<u>Strategic Plan Goal</u>	Unit Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?	What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?
Strategic Plan Goal 2 - The Student Community	Goal (1) Scholarships and Grants - Increase the amount of scholarships and grants awarded annually by 5%.
What action did you undertake to achieve this goal?	
University Advancement increased emphasis on soliciting endowments and unrestricted and restricted scholarships and grants in 2004-2005 by:	
<ul style="list-style-type: none">• Conducting a mini-campaign for engineering scholarships for the new engineering program.• Setting scholarships as a priority for the Alumni Association.• Conducting a scholarship luncheon to introduce scholarship recipients to their donors, thereby encouraging additional gifts.• Asking scholarship donors to increase gifts during the year.	
By what means did you assess goal achievement?	

Comparisons were made between scholarship and grant awards distributed in 2003-2004 and 2004-2005.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

Total amount of scholarships and grants awarded from the FGCU Foundation totaled \$373,690 in 2003-2004 and \$472,263 in 2004-2005, representing a 26% increase.

What continuous improvement resulted from the use of the assessment data?

As FGCU's enrollment continues to grow in double-digit numbers, the need for scholarships and grants remains a top priority.

- For those with financial need, scholarships and grants can make the difference in a student's decision whether to go on to FGCU for higher education or decide to enter the job market immediately after high school.
- For academically competitive students, scholarships and grants can make the difference in whether they choose to attend FGCU or another university.
- It is also important to the mission of FGCU to raise the average SAT/ACT scores of entering freshmen.

FGCU expects to enroll 14,000 students by the year 2010. In order for that to occur, scholarships and grants for these two groups will be most important.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 2 - The Student Community

Goal (2) Identify Donors for Programs - Identify donors and community partners to support development of proposed undergraduate and graduate programs.

What action did you undertake to achieve this goal?

University Advancement identified gift prospects using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
 - Selected Foundation Board members were asked to identify and introduce peer donor prospects.
 - Current donors were identified as prospects for new gifts.
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University Advancement solicited major donor prospects and conducted an Annual Community Campaign, Employee Campaign and individual College Campaigns.

By what means did you assess goal achievement?

The number of donors and community partners identified was counted.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

A target goal of 1,500 donors for 2004-2005 was established. As of April 30, 2005, the Foundation has recorded 1,576 donors into its database for the 2004-2005 year.

What continuous improvement resulted from the use of the assessment data?

The newly identified prospective donors/community partners create a significant link to the community. Not only can these individuals provide financial resources to support the three targeted programs (including endowed faculty positions, student scholarships, etc.), they can also provide advice about local needs that can positively impact curriculum development, assist with internships - greatly enriching the educational experience, and hire program graduates. Research on the 1,576 donors was catalogued by project and entered into the Foundation's database.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 3 - Co-Curricular and Athletic Programming

Goal (3) Athletics Clubhouse and Concession Area - Complete a baseball/softball clubhouse/concession area.

What action did you undertake to achieve this goal?

Completed drawings of the structure and infrastructure for the project using in-kind gifts of \$98,500 during the winter of 2005. Complete cost estimates for materials and labor during the summer 2005.

By what means did you assess goal achievement?

Project drawings of the new athletics clubhouse and concession area were reviewed upon completion. They are now available for use in preparing estimates for materials and labor.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

Project drawings have been forwarded to the project estimator for the next phase of the building project. The project remains on schedule.

What continuous improvement resulted from the use of the assessment data?
When completed, the new facilities will improve recruitment efforts, increase concession revenues and improve event attendance.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 5 - State Of The Art Infrastructure

Goal (4) Quality Facilities - Secure private funding for priority buildings on the PECO list.

What action did you undertake to achieve this goal?

Prospects for an Engineering Building were identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.

Prospects were prioritized and top prospects for this project were solicited for strategic gifts.

By what means did you assess goal achievement?

Receipt of strategic gifts.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

The Whitaker Foundation of Roslyn, Virginia contributed the strategic gift of \$5 million for the Engineering Building. University Advancement submitted a matching gift request for the Alec P. Courtelis Facilities Enhancement Fund to the 2005 Florida State Legislature.

What continuous improvement resulted from the use of the assessment data?

Engineering students enrolled in the new engineering program will have a new building with state-of-the-art equipment to enhance the learning experience in this discipline.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 6 - Research and Sponsored Programs

Goal (5) Charter School - Acquire site and identify funding sources for the establishment of a charter developmental research school by 2008.

What action did you undertake to achieve this goal?

Goal is currently being re-considered.

By what means did you assess goal achievement?

N/A

Describe the assessment results and the conclusions about goal attainment you inferred from them.

N/A

What continuous improvement resulted from the use of the assessment data?

N/A

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

Strategic Plan Goal 6 - Research and Sponsored Programs

What were your unit level goals for 2004-2005 as contained in your [2003-2004 annual report?](#)

Goal (6) Research Park - Acquire site and identify funding sources.

What action did you undertake to achieve this goal?

Prospects for the Research Park site were identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.

Multiple sites for a Research Park were considered based on the following criteria: location of property, cost, gift potential and size of property. Associated funding was identified for four of these sites.

By what means did you assess goal achievement?

Final site selection and acceptance.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

The goal was achieved when a written gift pledge for one of the four sites (i.e., 75 acres of land near the University) was considered, accepted and secured. In addition to completing the site selection for an initial research park, negotiations are underway for three additional sites for future research parks.

What continuous improvement resulted from the use of the assessment data?

Research parks facilitate the University's research opportunities and partnerships for both our undergraduate and graduate students. Research park partnerships will enhance the scientific research image of the University.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 7 - Community Leadership

Goal (7) Marine Science Center - Identify potential donors for the Marine Science Center.

What action did you undertake to achieve this goal?

Prospects for the Marine Science Building were identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.

Prospects were prioritized and top prospects were solicited for strategic gifts.

By what means did you assess goal achievement?

A qualified list of prospective donors for the Marine Science Center was identified.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

Fifty individuals from the prospect list were invited to a reception hosted by a Foundation Board member to learn about the project and associated giving opportunities.

What continuous improvement resulted from the use of the assessment data?

A strategic gift from this activity is currently being pursued. The Marine Science Center is important to the University because it would provide critical research facilities for undergraduate and graduate marine science research. This project is also important to the environmental mission of the University.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 7 - Community Leadership

Goal (8) Naples Center - Identify potential sites for the Naples Center, including the Renaissance Academy.

What action did you undertake to achieve this goal?

Prospects for the Naples Center site were identified using the following actions:

- A prominent realtor knowledgeable in Naples real estate was engaged to research numerous sites.
- The Chair of the Real Estate Committee of the Foundation Board was asked to provide professional guidance in the selection of sites.

By what means did you assess goal achievement?

Final site selection and acceptance.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

Assessments based upon location, cost, gift potential and size were completed on fifteen potential sites. From those assessments, a final site was selected.

What continuous improvement resulted from the use of the assessment data?

The site will be the permanent home to the Renaissance Academy's lifelong learning programs, as well as selected credit and non-credit course.

In order to make the best and fiscally responsible decision about future site selection and acquisition on new properties, University Advancement will continue to consider location, cost, gift potential and size.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your [2003-2004 annual report](#)?

Strategic Plan Goal 7 - Community Leadership

Goal (9) Foundation Fundraising - Raise \$15 million.

What action did you undertake to achieve this goal?

University Advancement solicited gift from donors and prospects for FGCU priorities after determining the readiness of prospective donors to move from the cultivation phase to the solicitation and gift phases.

In order to achieve this goal, University Advancement completed the following actions:

- Submitted proposals.
 - Planned and executed mini-campaigns for priority projects.
 - Held prospect receptions.
 - Held fundraising events.
 - Hosted donor recognition events.
 - Published an annual report, including the contributor role.
 - Held groundbreakings and building dedications.
 - Conducted proper stewardship for current donors.
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- Encouraged press coverage of FGCU priorities and University Advancement functions.

By what means did you assess goal achievement?

Records maintained in donor and financial systems and sum totals retrieved from those systems.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

Totals reflected in donor and financial systems exceeded the \$15 million goal. As of April 30, 2005, donations totaled in excess of \$27 million.

What continuous improvement resulted from the use of the assessment data?

The \$15 million goal for University Advancement will fund scholarships, support programs and construct buildings of strategic interest to FGCU. University Advancement will continue to time solicitations based on prospect ability and interest to donate to specific FGCU priorities.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 7 - Community Leadership

Goal (10) Fundraising Proposals - Increase the number of written proposals for funding.

What action did you undertake to achieve this goal?

Prospects for major and strategic gifts were identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.
- Current donors were identified as prospects for new gifts.

Prospects were prioritized and top prospects were solicited for strategic gifts.

By what means did you assess goal achievement?

Records of written proposals were maintained to assess the goal.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

Thirty proposals have been submitted as of April 30, 2005, which exceeds the 2003-2004 total of 25.

What continuous improvement resulted from the use of the assessment data?

The successful proposals contributed to the \$27 million raised during the year.

Individual proposals have proven successful and will continue to be used to help fund scholarships, support programs and construct buildings of strategic interest to FGCU.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your [2003-2004 annual report?](#)

Strategic Plan Goal 7 - Community Leadership

Goal (11) - Donor Identification -Identify donors for 1) Engineering Building, 2) Engineering Scholarships, and 3) Performing Arts Center

What action did you undertake to achieve this goal?

Prospects for these three projects were identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.
- Current donors identified peer prospects.

Prospects were prioritized and top prospects for the three projects were solicited.

By what means did you assess goal achievement?

Adequate numbers of prospects, solicitations, and lead gifts.

Describe the assessment results and the conclusions about goal attainment you

inferred from them.

The strategic donor for the Engineering Building was secured.

Donations for Engineering Scholarships exceeded the goal of \$120,000.00.

A total of 104 prospective donors were identified for the Performing Arts Center. Prospects were prioritized and three lead prospective donors were identified and received written proposals.

What continuous improvement resulted from the use of the assessment data?

The results have permitted FGCU to announce the opening of the Engineering program, recruit faculty, recruit students and begin classes in the fall of 2005 - one year ahead of schedule.

The number of prospective donors for the Performing Arts Center will likely provide an adequate number of funding sources to support this initiative. University Advancement will continue to seek donors for this initiative.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 7 - Community Leadership

Goal (12) Scholarship Packages - Secure funding for 10 full engineering packages worth \$120,000.00.

What action did you undertake to achieve this goal?

Prospects for this project were identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.
- Current donors identified peer prospects.

Prospects were prioritized and top prospects for Engineering Scholarships were solicited.

By what means did you assess goal achievement?

Actual number of scholarships dollars was compared to target goal.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

The target goal of funding for ten full-ride scholarships was exceeded. The Engineering Scholarship mini-campaign was a success.

What continuous improvement resulted from the use of the assessment data?

Funding for the ten full scholarships has permitted the new engineering faculty and admissions staff to begin the student recruitment process in earnest. The scholarships will give recruiters the opportunity to attract some of the very best students to enroll in this program. The use of peer solicitation was successful in this campaign and will be replicated whenever possible.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your [2003-2004 annual report?](#)

Strategic Plan Goal 7 - Community Leadership

Goal (13) Alumni Association - Increase alumni association dues paying members and programs.

What action did you undertake to achieve this goal?

Advertised and promoted alumni association memberships in the quarterly alumni magazine and to letters to graduates. Developed and hosted more programs for alumni in 2004-2005 as compared to 2003-2004.

By what means did you assess goal achievement?

Counted numbers of alumni association memberships and numbers of programs in 2003-2004 and then compared them to numbers from the same categories in 2004-2005. Memberships were reviewed by the Alumni Association Membership Committee.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

More memberships were sold in 2003-2004 than in 2004-2005. Year 2003-2004 was the first year in the history of the University that alumni association memberships were offered and more graduates were awaiting the opportunity to join. Final 2004-2005 numbers will be a more accurate projection of future numbers.

What continuous improvement resulted from the use of the assessment data?

After a complete review of the alumni association memberships strategy, the Alumni Association Membership Committee concluded that additional advertising and marketing through targeted mailings would increase the number of annual memberships. A

recommendation for more funding to accomplish this is being considered. A first draft of an overall communications plan, including additional membership mailings, was presented to the Alumni Association meeting in May 2005. The Alumni Association voted to require a membership report from the Membership Committee at every future meeting.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your [2003-2004 annual report](#)?

Strategic Plan Goal 7 - Community Leadership

Goal (14) Community Outreach - Develop community outreach efforts.

What action did you undertake to achieve this goal?

In order to achieve this goal, the Office of Community Relations and Marketing completed the following actions:

- Assigned 21 FGCU representatives to attend regional chambers of commerce.
- Established system for ensuring FGCU's visual presence via print ads, banners and kiosks at Chamber of Commerce Welcome Centers.
- Increased the University's newspaper circulation in the community by 1,000, a 15% increase.
- Promoted Speakers Bureau and Experts Directory internally and externally.
- Conducted campus solicitation campaign to benefit community charities.

By what means did you assess goal achievement?

Quantified actions for targeted audiences. Assessed feedback via telephone calls, emails, and other responses.

Describe the assessment results and the conclusions about goal attainment you

inferred from them.

- Chamber of Commerce Welcome Centers attract thousands of visitors monthly during peak season. FGCU's visual presence, in the form of banners and publications in these Centers, informs and raises awareness of the University's presence in the region. As of April 30, 2005, ten Welcome Centers display FGCU banners and/or publications.
- The University newspaper's community circulation increased by 1,000 in 2004-2005, representing a 15% increase in numbers reached.
- The Speakers Bureau and Experts Directory increased their membership by 30% in 2004-2005 and facilitated 51 referrals during the year.
- Charitable contributions to community agencies increased from \$26,000 in 2003-2004 to \$44,581 in 2004-2005.

Overall, these results demonstrate significant increases in numbers reached and, therefore, successful goal attainment.

What continuous improvement resulted from the use of the assessment data?

The rate of growth within the University and in the service area requires continuous increase in community outreach and information efforts. To maintain an FGCU presence in key areas, Community Relations is assigning (has been assigned?) specific responsibility for further developing existing outreach programs and identifying additional outreach programs to meet community informational needs. Numbers of people reached will continue to increase significantly, as indicated in the results above. Positive community outreach will also manifest itself in increased new student enrollment, increased donations to the University and cooperative partnerships with business, industry, and governmental agencies.

Strategic Plan Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

Strategic Plan Goal 7 - Community Leadership

Unit Goal

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Goal (15) Mass Media - Maximize use of mass media.

What action did you undertake to achieve this goal?

Develop and implemented media advertising campaigns for maximum exposure in mass media.

By what means did you assess goal achievement?

Quantified number of FGCU stories in print and electronic media resulting from media relations products including press releases, media advisories, press referrals, profiles, press conferences, etcetera.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

- 210 press releases resulted in 296 good news stories in print in 2004-2005 compared favorably to the 157 press releases that resulted in 191 good news stories in print in 2003-2004.
- Previously aired exclusively on WGCU Television, the FGCU Quarterly Report is now carried with multiple airings on five additional television stations in 2004-2005, thereby doubling its original viewing audience.
- The monthly advertorial in Gulfshore Business magazine is disseminated to 13,000 subscribers in the University's service area.
- The FGCU advertisement on the News-Press' website is seen by 59,000 readers, a key location for branding, and sends 180 visitors per month to the FGCU website.

Marketing efforts via mass media included the following:

- Ads in statewide magazines generated a pool of 12,000 student prospects in 2004-2005 as compared to 9,300 student prospects in 2003-2004.
 - A print ad campaign via the News-Press, Naples Daily News and the Charlotte Sun Herald reached a combined readership of over 200,000 different subscribers in the five county service area.
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- Television ads were aired on three local network affiliate stations reaching the entire service area with a frequency of 65 spots over the course of one week.
- Additional television ads promoting each academic college and the resort and hospitality management program were aired weekly from January through April on WBBH television station to a targeted audience including the district's brightest students and their families.
- A total of 72 ads were aired on the *A-Team Challenge*, the academic competition program featuring a team from each high school in the University's service area.
- FGCU has two display ads at Southwest International Airport, where the average daily traffic is in the tens of thousands.
- FGCU invested in outdoor advertising in 2004-2005 for the first time. The billboard is on a quarterly rotation schedule and is visible to 31,000 vehicle travelers daily. With this level of mass media usage, the goal of reaching hundreds of thousands of people multiple times was accomplished.

What continuous improvement resulted from the use of the assessment data?

Continued effective use of mass media reaches large segments of the population and should continue for branding, raising awareness, informing the public and image enhancement. Maximum use of mass media will also promote new student enrollment, new donations to the University and cooperative partnerships with business, industry, and governmental agencies.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2004-2005 goal best align?

What were your unit level goals for 2004-2005 as contained in your 2003-2004 annual report?

Strategic Plan Goal 8 - Ongoing Quality Improvement

Goal (16) Assessment Plan - Create an assessment plan.

What action did you undertake to achieve this goal?

Identified department assessment liaison who met with University Assessment Committee.

Developed and wrote an assessment plan to measure progress towards annual goal completion, including recommendations for continuous improvement, planning, and budgeting.

By what means did you assess goal achievement?

Assessment plan was submitted to the Office of Planning and Institutional Performance.

Describe the assessment results and the conclusions about goal attainment you inferred from them.

The assessment plan provided a general framework for measuring Foundation initiatives. In retrospect, the plan needs to be less specific and generally more broad in scope.

What continuous improvement resulted from the use of the assessment data?

The assessment plan gave formal acknowledgement to ongoing assessment activities for some unit goals and provided a framework to use in reviewing the remaining goals. A planning retreat was held on April 27, 2005 for the purpose of studying/improving the timing of all special events.

Section C

Program or Service Specific Assessments

What program or service specific assessment occurred in the current academic year?

Alumni who participated in alumni programs in 2003-2004 were surveyed to determine what types of alumni programming was most desirable/useful. The Alumni Association Board reviewed all survey data and provided feedback regarding the types of programs that should be offered to alumni in 2004-2005.

How were the results of the assessment used to improve programs or services?

Alumni programming in 2004-2005 focused upon career and vocational development in direct response to the 2003-2004 survey results. A calendar of events for 2004-2005 was mailed to all alumni.

What program or service specific assessment occurred in the current academic year?

The office of special events conducted ongoing program review throughout the 2004-2005 year. In particular, the division participated in an extensive review of all donor related events and the entire calendar.

How were the results of the assessment used to improve programs or services?

The division identified and prioritized competing interests and reviewed event goals. Event recommendations included: goals, time of year, seasonal considerations, location, facility availability, facility resources, dates, proximity to other events, etcetera. Maintaining or improving attendance at Foundation events will result in improved donor/prospect stewardship and improved fundraising results.

What program or service specific assessment occurred in the current academic year?

Staffing needs are reviewed every year. A planned giving officer, coordinator for college campaigns, and a coordinator of events were added to the staff in 2004-2005 to help meet Foundation goals. FGCU and the Foundation provided necessary funds to support these new positions.

How were the results of the assessment used to improve programs or services?

Additional staff contributed to the overall achievement of annual Foundation goals including, but not limited to, planned giving, college campaigns, and special events.

What program or service specific assessment occurred in the current academic year?

The budget was reviewed in 2004-2005 in anticipation of both ongoing and new capital campaign costs.

How were the results of the assessment used to improve programs or services?

As a result, the Foundation Board authorized up to an additional \$125,000 for capital campaign expenses during the 2005-2006 academic year.

Section D

Unit Contribution to President's Performance Measures

Please review the President's Performance Measures for 2004-2005. Did your unit contribute to any specific performance goals for the President? (If so, please indicate whether the measure set was attained and to what degree.)

Foundation efforts during 2004-2005 contributed to the following President's Performance Measures and in the following manner: **Measure #5 - Build New Facilities on Campus - WCI Green Building:** The president has hired a new project director, Dr. Jennifer Languell. Dr. Languell is a recognized authority in Green Buildings. FGCU also hired Astorino a new architectural firm with extensive experience in Green Building design in the United States and

abroad; **Kleist Health Education Center:** The Center opened for students in April 2005. The grand opening and dedication ceremony for the building was held on May 4, 2005; **Herbert J. Sugden Hall for Resort and Hospitality Management:** The architectural firm of Kha Le-Huu and Partners has been selected and design plans are proceeding; and **Naples Botanical Garden Laboratory:** FGCU has secured 2+ acres of land for the building. The operating agreements will be completed by the end of the fiscal year. **Measure #6 - Increase Non-State Funding Support:** Raised \$27 million and completed the \$125 million campaign. Announced a new goal of \$200 million. **Measure #7 - Increase/Improve Academic/Community Outreach:** With assistance from the Charlotte County Advisory Council, the Foundation has begun to identify potential donors for the FGCU/Charlotte County Center Building. The first planning session is expected before the end of the fiscal year. It is anticipated that a \$4 million match from the state will follow \$4 million raised from private contributions in the future. **Measure #8 - Develop Research Park:** University Advancement division has identified donated land for the FGCU Research Park. Administrative Services has identified several tenants. **Measure #9 - Charter Development Research School:** This goal has been reconsidered. **Measure #10 - Intercollegiate Athletics:** The baseball stadium was dedicated and officially named Swanson Stadium in April 2005 in honor Mr. and Mrs. Swanson. Plans to build a clubhouse and concession area for baseball and softball were completed with in-kind gifts of \$98,000. Construction estimates are currently being prepared. **Measure #27 - Private and Public Funding Initiatives - Engineering:** the Foundation has secured the \$120,000 for the first ten full scholarships. Ongoing solicitations continue for additional scholarships, professorships and operations; **Chinese Studies:** The Foundation has worked with the School of Business to establish relationships with several high-ranking universities in China. FGCU is currently working with officials from Nankai University to establish a wide-ranging exchange program; **Music:** The College of Arts and Sciences is in the final stages of hiring the first director of the School of Music. The Foundation has developed a plan for the Performing Arts Complex and a donor for the lead gift has been identified; **Early Learning Literacy Model:** the Foundation is pleased to announce that the Naples Children Education Foundation will provide funding for this program for the second consecutive year; **Professional Tennis Management:** The Foundation has secured a major gift for scholarships. Efforts continue towards achieving program certification; **Charlotte Center:** FGCU has been offered 5 acres of land from Charlotte County and due diligence is being undertaken. Fundraising plans will be discussed at the upcoming scheduled meeting with the Charlotte County Advisory Council; **Naples Center:** The desired site has been selected and FGCU will close on the land shortly after the end of the fiscal year. A lead gift has been secured, and a mini fundraising campaign is being planned to begin in the fall; **Endowed Chair in Ethics:** FGCU has received the long-awaited state matching funds for the endowed chair. The College of Business has identified and selected Dr. Charles Fornaciari, an outstanding young professor, to develop the curriculum; **Marine Science Center:** A reception for prospective donors was held on April 29, 2005. The Foundation is in the process of following-up with interested prospective donors; **Charter Development Research School:** The FGCU strategic goal has changed regarding this initiative; and **Performing Arts Center, Library and College of Business:** Prospective donors have received proposals for naming opportunities.

Part 2

Section A

Unit Goals for Coming Year (2005-2006)

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 2 - The Student Community
Goal (1) Scholarships and Grants -
Increase the amount of scholarships and grants awarded annually by 5%.

What action(s) will you undertake to achieve the goal?

University Advancement will continue to secure endowments and unrestricted and restricted scholarships and grants in 2005-2006 by:

- Conducting mini-campaigns for targeted scholarship areas.
- Continuing to solicit scholarships from the alumni.
- Conducting a scholarship luncheon to introduce scholarship recipients to their sponsors, thereby encouraging additional gifts.
- Encouraging increased gifts from athletics donors.

By what means will you assess goal achievement?

Comparisons will be made between scholarship and grants distributed in 2004-2005 and 2005-2006.

How will you know if you have successfully attained each goal?

The total amount of scholarships and grants awarded from the Foundation will increase by 5% over 2004-2005 totals.

How will the results of the above assessments be used to improve student learning or services?

Increased scholarships will provide greater access to FGCU's educational opportunities. With greater financial support, students should be able to focus more on their academic pursuits and this should ultimately be seen in improved retention rates. Diversity should also improve as a result of successfully meeting this goal.

FGCU expects to have 14,000 students by the year 2010. In order for that to occur, an increased number scholarships/grants will be necessary.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does

Unit Goal
Goal for 2005-2006

your 2005-2006 goal best align?

Strategic Plan Goal 2- The Student Community

Goal (2) Identify Donors for Programs - Identify donors and community partners to support development of proposed undergraduate and graduate programs.

What action(s) will you undertake to achieve the goal?

Prospects for strategic and major gifts will be identified using the following actions:

- A prospect researcher will be engaged to identify new donor prospects.
- Selected Foundation Board members will be asked to identify and introduce peer donor prospects.

University Advancement will solicit major donor prospects and conduct an Annual Community Fund campaign, Employee Campaign and individual College Campaigns.

By what means will you assess goal achievement?

A target goal of 1,600 donors and community partners has been established for the 2005-2006 to support undergraduate and graduate programs. The donors will be recorded and the total number counted.

How will you know if you have successfully attained each goal?

The number of donors will meet or exceed the goal of 1,600.

How will the results of the above assessments be used to improve student learning or services?

New donors will join the existing donor population in providing the additional resources necessary to support FGCU's funding priorities for 2005-2006.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 3 - Co-Curricular and Athletic Programming

Goal (3) Athletics Clubhouse and Concession Area - Complete a baseball/softball clubhouse/concession area.

What action(s) will you undertake to achieve the goal?

Major gift donor solicitation will continue into 2005-2006. Upon completion of building estimates, significant in-kind gifts will be solicited for each phase of the initiative to cover building costs.

By what means will you assess goal achievement?

Pledges and gifts will be entered into the Foundation database. Total gift sums will be compared to building costs throughout the year.

How will you know if you have successfully attained each goal?

The goal will be accomplished when the necessary funds are raised and the facilities are completed.

How will the results of the above assessments be used to improve student learning or services?

When completed, the new facilities will be comparable to the best facilities in the nation and thereby improve student-athlete recruitment efforts, increase concession revenues and improve event attendance.

Strategic Plan Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal

Goal for 2005-2006

Strategic Plan Goal 5 - State Of The Art Infrastructure

Goal (4) Quality Facilities - Secure private funding for priority buildings on the PECO list.

What action(s) will you undertake to achieve the goal?

Prospects for the Naples Center, Music Hall, and enhancement of the College of Business Building will be identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.

Prospects will be prioritized and top prospects for the three projects will be solicited for strategic gifts.



By what means will you assess goal achievement?

Receipt of strategic gifts.

How will you know if you have successfully attained each goal?

The goal will be attained when a lead gift is secured for each project.

How will the results of the above assessments be used to improve student learning or services?

Students enrolled in these programs will have new buildings will state-of-the-art equipment to enhance the learning experience in their disciplines.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 6 - Research and Sponsored Programs
Goal (5) Research Park - Acquire site and identify funding sources.

What action(s) will you undertake to achieve the goal?

Goal achieved in 2004-2005.

By what means will you assess goal achievement?

N/A

How will you know if you have successfully attained each goal?

N/A

How will the results of the above assessments be used to improve student learning or services?

N/A

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership
Goal (6) Marine Science Center - Identify potential donors for the Marine Science Center.

What action(s) will you undertake to achieve the goal?

Donor prospects identified in 2004-2005 for the Marine Science Building will continue to be solicited for lead gifts.

In addition, new prospects will be identified using the following actions:

- A prospect researcher was engaged to identify new donor prospects.
- Selected Foundation Board members were asked to identify and introduce peer donor prospects.

Prospects will be prioritized and top prospects will be solicited for strategic gifts.

By what means will you assess goal achievement?

A qualified list of prospective donors for the Marine Science Center was identified in 2004-2005. Additional qualified prospects will be added, as necessary, in 2005-2006.

How will you know if you have successfully attained each goal?

Fifty individuals from the prospect list were invited to a reception in 2004-2005 to learn about the project and associated giving opportunities. Continued follow-up with this group will be accomplished in 2005-2006.

Additional prospects will be identified and solicited for a lead gift for this project, if necessary.

How will the results of the above assessments be used to improve student learning or services?

The Marine Science Center is important to the University because it would provide critical research facilities for undergraduate and graduate marine science research. It is also important to the environmental mission of the University.

Strategic Plan Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal

Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership **Goal (7) Foundation Fundraising** - Raise \$25 million.

What action(s) will you undertake to achieve the goal?

University Advancement will solicit gifts from donors and prospects for FGCU priorities after determining the readiness of prospective donors to move from the cultivation phase to the solicitation and gift phases.



In order to achieve this goal, University Advancement completed the following actions:

- Submit proposals.
- Plan and execute mini-campaigns for priority projects.
- Hold prospect receptions.
- Hold fundraising events.
- Host donor recognition events.
- Publish an annual report, including the contributor role.
- Hold groundbreaking and building dedications.
- Conduct proper stewardship for current donors.
- Encourage press coverage of FGCU priorities and University Advancement functions.

By what means will you assess goal achievement?

Records maintained in donor and financial systems and sum totals retrieved from those systems.

How will you know if you have successfully attained each goal?

Totals reflected in donor and financial systems will exceed \$25 million.

How will the results of the above assessments be used to improve student learning or

services?

The use of donated funds will continue to build facilities, fund scholarships/grants, and create and support academic programs and faculty positions, thereby supporting students directly and indirectly. The quality and breadth of educational opportunities will continue to improve and expand in direct proportion to increased levels of state and private funding.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership **Goal (8) Fundraising Proposals** - Increase the number of written proposals for funding.

What action(s) will you undertake to achieve the goal?

Prospects for major and strategic gifts will be identified using the following actions:

- A prospect researcher will be engaged to identify new donor prospects.
- Selected Foundation Board members will be asked to identify and introduce peer donor prospects.
- Current donors will be identified as prospects for new gifts.

Prospects will be prioritized and written proposals prepared for top prospects.

By what means will you assess goal achievement?

Records of written proposals will be maintained to assess this goal.

How will you know if you have successfully attained each goal?

The total number of written proposals in 2005-2006 will be compared to the target goal of 35.

How will the results of the above assessments be used to improve student learning or services?

The successful proposals will contribute to the \$25 million goal for the 2005-2006 year.

These proposals will help fund scholarships, support programs and construct buildings of strategic interest to FGCU.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership **Goal (9) - Donor Identification** - Identify donors for 1) Engineering Building, 2) Engineering Scholarships, and 3) Performing Arts Center

What action(s) will you undertake to achieve the goal?

Donors for the Engineering Building and Engineering Scholarships were identified and secured in 2004-2005.

Prospective lead donors for the Performing Arts Center will be solicited in 2005-2006.

By what means will you assess goal achievement?

A campaign prospectus will be generated to solicit major and general gifts for the Performing Arts Center.

The prospectus will be presented to major and general gift prospects.

Gifts will be secured.

How will you know if you have successfully attained each goal?

The lead donor for the Performing Arts Center will be identified.

How will the results of the above assessments be used to improve student learning or services?

When funded and completed, the new Performing Arts Center will greatly facilitate student learning in the fields of music and theatre.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership **Goal (10) Alumni Association** - Increase alumni association dues paying members and programs.

What action(s) will you undertake to achieve the goal?

Implement communications plan that includes three additional mailings to prospective members, current annual members for renewals, and current seniors. Create budget request for initiative, if necessary. Send postcards advertising alumni programs, in addition to the

calendar of events.

By what means will you assess goal achievement?

Count (and analyze demographics) number of memberships every year. Encourage Alumni Association Membership Committee to survey members and non-members regarding memberships. Present findings to the Alumni Board. Count and compare number of programs every year.

How will you know if you have successfully attained each goal?

If numbers of memberships and number of programs exceed previous year's totals, the goal of increasing both memberships and programs will have been met. The marketing strategy will best be evaluated if the additional mailings to targeted alumni populations are realized.

How will the results of the above assessments be used to improve student learning or services?

An analysis of the sub-populations who are purchasing memberships will be completed. Careful attention will be directed to those Colleges, if any, who are over/under performing. A marketing strategy based upon market segmentation will emerge throughout the year.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership **Goal (11) Community Outreach** - Develop community outreach efforts.

What action(s) will you undertake to achieve the goal?

- Increase information output to the community by 10%. Additional output will include development of Web pages providing information about faculty achievement and student profiles.
- Aggressively promote FGCU expertise to community for utilization, including experts and speakers bureau.
- Target multiple audiences for FGCU news.

By what means will you assess goal achievement?

- Quantify numbers reached and assess quality of output through feedback via response cards and email.

How will you know if you have successfully attained each goal?

- Specific outcomes will be identified for each program and results will be evaluated in terms of quantity and quality.

How will the results of the above assessments be used to improve student learning or services?

- A better informed community about the benefits of FGCU enhances its image, supports student and faculty recruitment, promotes friendraising, and encourages fundraising.

Strategic Plan Goal
With which 1 or 2 goals from the 8
current strategic plan goals does
your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 7 - Community Leadership **Goal (12) Mass Media** - Maximize use of mass media.

What action(s) will you undertake to achieve the goal?

- Evaluate media outlets and then strategically place media buys for maximum reach and frequency.

By what means will you assess goal achievement?

- Quantify number of stories printed, audiences reached, ad responses received, electronic media covered, and website hits.

How will you know if you have successfully attained each goal?

- Quantifiable data such as size of audience by industry ratings, readerships, and circulations.

How will the results of the above assessments be used to improve student learning or services?

- Success in maximizing use of mass media will result in a better informed public about
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he benefits FGCU offers in high quality education, community outreach, research, and cultural programming. A more informed public will seek to use University resources, thereby increasing demand and generating more funding for students.

Strategic Plan Goal
With which 1 or 2 goals from the 8 current strategic plan goals does your 2005-2006 goal best align?

Unit Goal
Goal for 2005-2006

Strategic Plan Goal 8 - Ongoing Quality Improvement
Goal (13) Assessment Plan - Create an assessment plan.

What action(s) will you undertake to achieve the goal?

The assessment plan will be reviewed and revised accordingly.

By what means will you assess goal achievement?

Assessment plan will be re-submitted. Goal achievement will be measured by confirmation that the plan meets all proscribed standards.

How will you know if you have successfully attained each goal?

The Associate Vice-President for Planning and Institutional Performance will communicate that the plan meets all expectations.

How will the results of the above assessments be used to improve student learning or services?

Individual assessment plan activities will occur throughout the 2005-2006 academic year to monitor ongoing practices, confirm goal attainment, support budget recommendations, review staffing patterns, plan future initiatives, and evaluate completion of unit goals.

Section B

Resources

What additional resources have you requested and received a commitment for during 2005-2006 from your area VP or the President that is based on your analysis of assessment data for 2004-2005?

After reviewing goal attainment for 2004-2005 and establishing new goals for 2005-2006, the Vice President for University Advancement has requested and will receive resources for the following three commitments:

1. Events Coordinator to assist with the growing number of special events that are hosted
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to steward existing donors and cultivate prospective donors. Projected cost \$40,000.

2. Data Base Manager to oversee donor information system of names, addresses, interests, contacts, gift amounts, etcetera, and manage record number of gifts being received. Projected cost \$50,000.
3. The Capital Campaign has been increased from \$125 million to \$200 million. Projected costs for campaign related publications, events, reports, and mini-campaigns is \$135,000.

The total for three additional commitments is projected at \$225,000. Funding sources include: Foundation \$125,000 and FGCU \$100,000.

What additional resource needs do you have for fulfillment of your goals that you wish for consideration from your area VP or the President that is based on your analysis of assessment data for 2004-2005?

After reviewing goal attainment for 2004-2005 and establishing new goals for 2005-2006, the following additional resources have been requested by the Vice President for University Advancement for the 2005-2006 year:

1. One additional employee: A Coordinator of Community Relations position would greatly enhance the services provided in the Office of Community Relations and Marketing by coordinating the record numbers of press releases, media events, and external requests for information during the 2005-2006 year. Projected cost \$35,000.
 2. Technical support (e.g., computers, phones, software licenses) and Office support (e.g., mailings, supplies, business cards) for the two committed positions and the third requested position includes additional projected costs totaling \$50,000.
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Section C

Assessment Plans

What assessments are you planning to conduct during 2005-2006?

- Staffing needs will be reviewed.
 - Alumni association memberships and programs will be measured.
 - The invoicing process will be evaluated. Perform random checks on the tax receipt processing timeline. Reconcile monthly bank statements with accounting system on a monthly basis.
 - An unqualified audit will be completed. Improve financial processes to facilitate collection and redistribution of donations.
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Section D

Coming Year - Strategic Plan Contributions

2.4.1.a, 2.5.1.b, 3.4.3.b, 5.1.1.b, 6.3.3-4, 7.3.2, 7.5.1.a, 7.6.1-2, and 8.2.1
