



2019 DEVELOPMENT OPERATIONS ACTIVITY Plan

Fundraising Activity

2019 Development Goals:

Outright Gifts & Pledges	\$32,000,000
Planned Gifts	\$14,000,000
Founding Director Fund	\$1,000,000
Air Force Academy Fund/USAFA Impact Fund	\$2,500,000
Graduate Donors	6,500

Revenue goals organized by individual

**Please note that these fundraising goals total \$36 million. Once the Annual Giving, Parent & Family Giving, and Class Giving programs are added to the mix, organizational goals total \$43 million. I intentionally exceeded our organizational goal of \$32 million to make up for those individuals or programs that may not meet their fundraising goal.

	Total Goal – New Gifts & Pledges	Air Force Academy Fund/USAFA Impact Fund	Other Restricted Gifts
Total Goals	\$36,000,000	\$800,000	\$35,200,000
Gift Officer A	\$500,000	\$0	\$500,000
Gift Officer B	\$15,000,000	\$0	\$15,000,000
Gift Officer C	\$750,000	\$50,000	\$700,000
Gift Officer D	\$5,000,000	\$50,000	\$4,950,000
Gift Officer E	\$500,000	\$250,000	\$250,000
Gift Officer F	\$1,750,000	\$100,000	\$1,650,000
Gift Officer G	\$1,000,000	\$100,000	\$900,000
Gift Officer H	\$2,000,000	\$0	\$2,000,000
Gift Officer I	\$1,500,000	\$100,000	\$1,400,000
Gift Officer J	\$1,000,000	\$100,000	\$900,000
Gift Officer K	\$7,000,000	\$50,000	\$6,950,000

Revenue goals organized by program

**Total \$49,500,000

**Please note that Principal Gifts consists of Jennifer and Chris. Major Gifts consists of Al, Vince, Matthew, Jessica, and Natalie.

	Total Goal – New Gifts & Pledges	Founding Director Fund	Air Force Academy Fund/USAFA Impact Fund	Other Restricted Gifts
Annual Giving	\$3,500,000	\$0	\$2,500,000	\$1,000,000
Class Giving	\$2,500,000	\$0	\$0	\$2,500,000
Corporate & Foundation Relations	\$2,500,000	\$0	\$0	\$2,500,000
Major Gifts	\$6,000,000	\$1,000,000	\$450,000	\$4,550,000
Parent & Family Giving	\$1,000,000	\$0	\$500,000	\$500,000
Planned Giving	\$14,000,000	\$0	\$50,000	\$6,950,000
Principal Gifts	\$20,000,000	\$0	\$50,000	\$19,950,000

Proposal goals organized by individual

**This chart excludes Annual Giving, Parent & Family Giving, and Class Giving. Therefore, the goal total equals \$36 million instead of \$43 million.

**Please note that best practice/industry standard suggests a fundraiser will close gifts on a 3:1 ratio, meaning they need to put out three proposals for each gift closed.

	Total Goal – New Gifts & Pledges	Planned Proposal Totals
Totals	\$36,000,000	\$113.58 million
Gift Officer A	\$500,000	\$780,000
Gift Officer B	\$15,000,000	\$62.8 million
Gift Officer C	\$750,000	\$4.3 million
Gift Officer D	\$5,000,000	\$13.9 million
Gift Officer E	\$500,000	\$1.5 million
Gift Officer F	\$1,750,000	\$5.3 million
Gift Officer G	\$1,000,000	\$4.8 million
Gift Officer H	\$2,000,000	\$11 million
Gift Officer I	\$1,500,000	\$4.2 million
Gift Officer J	\$1,000,000	\$3.3 million
Gift Officer K	\$7,000,000	\$1.7 million

Non-Revenue Goals by each fundraising program

**These goals should be considered year-long goals with completion by or in December.

Goal
Parent Program
Enhance information-gathering tactics utilizing Webguy advertising; increase information secured by 10% YOY (as compared to 2018)
Evaluate affinity-based, restricted 2 nd asks through phone program & modify as needed
Integrate Prep School & Falcon Scholar parents into the program to extend cultivation timeline
Acquire 1600 donors (new gifts & commitments) & 1860 cash receipt donors
Conduct 3 events: (1) spring PLC meeting at NCLS, (2) summer In-Processing recruitment event, (3) fall PLC meeting during inter-service academy football game
Recruit 20 new families from the Classes of 2017 – 2019 to the PLC
Identify & confirm international parent prospects; involve board members in cultivation activities
Provide recommendation related to implementing a targeted past parent giving component to the program
Improve coordination of parent outreach & cultivation with the AFAAC; provide draft for MOU governing parent cooperation
Annual Giving
Achieve donor retention rate of 75%
Achieve donor fulfillment rate of 88%
Re-acquire 1,500 lapsed donors
Acquire 1,200 new first-time donors
Increase phone pledge rate by 5-8%
Increase number of phone donors by 3-5%
Successfully launch and complete 12 new crowdfunding projects
Increase Air Force Academy Fund donors of \$1,000+ by 5%

Incorporate campaign messaging and imagery into all new solicitations
Implement new multi-channel programs focusing on class giving, parents, various giving societies, unrestricted giving, and young alumni cohorts
Develop a series of annual giving quarterly reports
Participate in 2+ “giving day” opportunities: the All Academy Challenge & Giving Tuesday; develop plans for an Academy giving day
Gift Planning
Prepare 4 gift planning ads for <i>Checkpoints</i> – March, June, September, & December
Prepare 2 <i>Legacy</i> newsletter articles (printed & mailed two times per year – April & October)
Prepare 3 e-newsletter articles (distributed three times per year – January, May, & November)
Send twice yearly thank you/stewardship letters to Polaris Society members (signatories are Mike Lambert '70 and Dale Zschoche P'10) – February & October
Organize & conduct 4 Legacy Seminars – San Antonio, Seattle, Denver, & Phoenix
Organize & conduct 3 Polaris Luncheon in conjunction with Legacy Seminars – San Antonio, Denver, & Phoenix
Class Giving
Complete class campaigns for '67, '75, '76, & '81
Launch 7-8 new class giving projects with '4 and '9 classes
Enhance class giving website, featuring past class giving projects
Host reunion thank-you events for the Classes of '64, '69, '79, and '89 during fall reunions to recognize past projects
Design & deliver new class gift impact reports for all class projects implemented by August
Provide recommendation regarding implementation of cadet allotments as part of the Senior Class Gift
Develop class giving plan to formalize structure, timeline, and goal-setting process
Next Generation
Send four electronic newsletter updates over the course of the year, beginning in February
Grow the cohort from 124 to 150 through peer identification
Complete at least four networking events around the country; integrate into the Department of Management weekend at USAFA
Establish a “soft” solicitation strategy for the cohort
Establish a direct connection and personal contact (tracked through substantive contact reports) with 75% of the cohort (currently at about 40 of 124 individuals with a direct connection)

Other organizational goals:

Campaign

Goal	Timeline
Strategically integrate President & CEO into principal gift strategies	January
Implement staff fluency training	January
Refine overall gift pyramid with names attached	March
Board involvement as volunteer solicitors; evaluate volunteer training needs	April
Recruit Group Commanders	April
Finalize campaign priorities	April

Finalize campaign MOUs with other USAFA supporting foundations	May
Implement volunteer fluency training	May
Finish master campaign plan	June
Write preliminary descriptors/marketing statements about campaign priorities	June
Write & distribute training manual	October
Recruit Squadron Commanders	December

Donor Engagement

*** As of Jan. 31, 54 events are currently planned for 2019, excluding the meetings/dinners of the UE Board of Directors; five additional events are TBD and not yet included in the totals below.*

***Events will offer prominent hosting and speaking opportunities for Endowment Board Directors and campaign leadership.*

Quarter	Planned Events # & Locations
Quarter 1 (January – March)	8 – Las Vegas, Phoenix, Colorado Springs, Denver, Boston, Miami
Quarter 2 (April – June)	12 – Colorado Springs, San Antonio, Missouri, Denver, Los Angeles, DC, Seattle
Quarter 3 (July – September)	16 – Colorado Springs, Boulder, Denver, Chicago, NYC, New Mexico, Hawaii
Quarter 4 (October – December)	13 – Colorado Springs, Phoenix, Dallas, DC, Boise, Ft Collins, Annapolis

Donor Relations

Goal	Timeline
Execute approximately 65 events; secure “headliner” speakers and interactive cadet & faculty participation (event plan encompasses all fundraising programs and touches all regions of the country)	Jan - Dec
Capture invitation/attendee lists in RE to track impacts on philanthropic giving	Jan – Dec
Launch the Prop & Wings Society, recognizing \$1 million+ cumulative donors; host inaugural event	March (event in 2020)
Prepare comprehensive donor recognition plan for presentation to the UE Board	April
Plan & execute donor recognition event in conjunction with the completion of the Planetarium & Observatory renovations	April
Improve the online giving experience, in conjunction with IModules implementation; emphasis on ease of giving	August
Strengthen relationships with key USAFA leaders and gift fund administrators to enhance USAFA’s stewardship activities	August
Evaluate efficacy of donor honor roll with recommendations for (dis)continuing	August
Create & record in RE actionable individualized stewardship plans for select top donors	October
Refine and send donor surveys aimed at understanding what motivates donors to give & their expectations after making a gift	October

Host reunion thank-you events for the Classes of '64, '69, '79, and '89 during fall reunions to recognize past projects	November
Develop preliminary comprehensive campaign launch event plan; large gala in Colorado Springs, followed by regional launch events	December
Plan & execute donor groundbreaking ceremony for the Center for Cyber Innovation	December (event in 2020)

Communications

Goal	Timeline
Develop & implement new marketing concepts/messages	February
Develop Endowment 101 presentation	February
Create proposal & gift agreement templates that adhere to UE branding standards & provide updated content & imagery	March
Develop & implement calendar of video stories; goal is to deliver 12-24 video stories in 2019	March
Develop & implement communications calendar focused on team duties & deadlines; emphasis on completing incorporation of UE branding	April
Develop new website in conjunction with IModules implementation	June
Develop & implement communications plan focused on audiences reached by Athletics' marketing partner (i.e., Learfield)	June
Develop one-pagers for campaign priorities	July
Create Falcon Stadium collateral materials	August
Develop impact reports for each mission element	October
With August Jackson, collect pertinent facts, collateral, & leadership directions that will inform campaign & case statement branding	October
Create descriptions of 20 campaign priorities for use in donor proposals	December

In-House Operations

Goal	Program	Timeline
Expand role as purchasing agent for Academy needs; emphasis on meeting 50% of USAFA departments	Funds Management	May
Identify & assign 125 new major gift prospects per quarter for a minimum of 500 new assigned prospects in 2019	Research & Prospect Mgmt	Evaluated Quarterly
Implement monthly proposal pipeline report	Research & Prospect Mgmt	February
Identify & utilize new fund manager with the CCLD	Funds Management	February
Implement process to assist Stewardship/Special Events with identifying event invitees early in planning stages	Research & Prospect Mgmt	March
Implement quarterly sunset report	Research & Prospect Mgmt	March
Develop new pipeline tracking system for planned giving	Research & Prospect Mgmt	April

Complete electronic wealth screening; distribute suspects to gift officers	Research & Prospect Mgmt	April
Implement new metrics for quarterly gift officer portfolio reviews	Research & Prospect Mgmt	April
Provide Class Giving with prospect lists for the 2019 reunion classes	Research & Prospect Mgmt	May
Implement new giving society tracking system using RE Membership Module	Gift Entry & Data Integrity	June
Develop comprehensive list of potential board candidates	Research & Prospect Mgmt	June
Complete Top 300 list	Research & Prospect Mgmt	July
Implement tracking system to gauge the number of prospects identified through <i>Checkpoints</i> & other media review processes	Research & Prospect Mgmt	July
Develop a new quarterly fund status report for frontline fundraisers to show priority funds and active project updates	Funds Management	July
Incorporate AOG and A8/D funds available numbers into the UE's monthly funds available report to present 1 comprehensive report to USAFA departments	Funds Management	August
Implement IModules & ImportOmatic	Gift Entry & Data Integrity	August
Implement protocols related to saving & naming of Media tab items	Gift Entry & Data Integrity	August
Conduct research & reduce individuals identified as "lost souls" by 15%	Research & Prospect Mgmt	August
Implement football bio process	Research & Prospect Mgmt	August
Review & clean up Constituent Notes, Attributes, & Education tables	Gift Entry & Data Integrity	September

Hiring

Position	Hiring Manager	Date Search Begins	Date Selectee Begins
Annual Giving Coordinator	David Smith	In Progress	April
Assistant Director of Gift Planning	Dale Zschoche	In Progress	ASAP

Staff Training

Goal	Timeline
Portfolio analysis & training sessions with Ron Vanden Dorpel	January, May, & November
Develop & publish training schedule	March
Develop electronic book of all fundraising priorities (campaign, 2019 gift needs)	June
Participation in JSAAEC service academy conference & Mountain West Development Conference by members of the senior team	June

Frontline fundraiser group reading & discussion of two “fundraising themed” books	September
Conference attendance & site visits to other universities, as appropriate	December
Fluency training sessions on campaign priorities	December