

Development and Alumni Relations Council Monthly Scorecard – October 2017

Color Code Chart:	Yellow: On Hold
	Green: Moving Along
	Red: Delay

Main Goal/Achievements	Objective	Assigned To	Due Date	Tasks to Achieve Goal	October Status	December Status
Launch Data Enhancement Campaign	To encourage data sharing across UAA at all levels.	UA Foundation - Lead: Megan Riebe	Apr. 2018	Action 1: Appoint task force with system-wide representation to discuss data needs and vision for sharing across administrative units, i.e. admissions, Banner graduating student data, college and department.	Goal was not discussed due to lack of time. Wording for goal was changed from data improvement to data enhancement.	This goal will be on hold until Spring 2018 after the busy year-end giving season and after completion of a couple of large data-related projects.
UA Philanthropy Initiative Sub-Goal: Measure success beyond dollars raised and number of donors.	Working with colleagues, develop vision, goals and priorities in the context of the overarching strategic UA priorities.	Chair and/or Executive Director Foundation, Chief Fundraiser from each campus. Chair or designee, Alumni Relations lead from each campus. All members.	Input by Jan. 2018 Formal Report Summer of 2018 Dec. 2017 May-18	Action 1: Meet with Chancellor and Provost at each campus to identify and discuss near and long-term funding priorities for the campus. Discuss needs and how they fit into the larger UA priorities (re: strategic possibilities). Action 2: Develop talking points that articulate the budget status for UA. Look at this from the viewpoint of investors (our Action 3: Celebrating/Incentivizing Collaboration. Develop metrics (and incentives!) that encourage and celebrate collaboration amongst alumni relations' colleagues, fundraisers and deans/directors across the campuses.	Susan spoke with President's Executive Council and presented a template for campus goals. Adjustments are in process and she will provide an update soon. Interface with University Relations' council and cross-marker messaging that overlaps. Group talked about finding incentives and collaborations that could be done across the team. Sub-councils will be established to be chaired by Susan or Megan. The suggestions agreed upon by the Council will be presented to Board of Trustees at its May 2018 meeting to be followed by a presentation in June.	UA Foundation has received initial responses on fundraising priorities from the campuses. These will be shared system-wide with staff in the first week of December. They will also be discussed with the UA Foundation Board of Directors 12/7. The philanthropy initiative will be a major focus of this group going forward. Major gifts sub-council has been established with monthly meeting schedule beginning in January. This topic is on the agenda for the first meeting.
Events Best Practices	Develop a common understanding across UA of "Advancement events."	Rachel Morse and Fred Barlow to facilitate.	May-18	None Assigned	Rachel and Fred will be facilitating conversations with and touching bases with innovators at the college level.	
Scholarship Fundraising Effort	To establish and improve augmentation/timing of both need- and merit-based scholarships as their availability is needed and that progress in these areas can improve student recruitment, retention and completion.	Megan Olson - suggested	N/D	Action 1: Creation of two sub-groups- Sub-group 1. Scholarship awarding process Sub-group 2. Scholarship fundraising focus areas Action 2: Develop strategies with Development Officers SW to maximize unrestricted scholarship pools. Action 3: Develop a Communications Plan	Sub-group 1: LEAN process already completed and communications plan needs to be developed. Sub-group 2: Chair will be Doug and Mark will work with him. The Deans will determine who from UAS should participate.	