

College Advancement
STRATEGIC PLANNING DOCUMENT
June 2007

THE MISSION OF ST. NORBERT COLLEGE

St. Norbert College is a Catholic, liberal arts college embracing the Norbertine tradition of community and is committed to providing an educational environment that is intellectually, spiritually and personally challenging.

THE MISSION OF COLLEGE ADVANCEMENT

College Advancement helps St. Norbert College fulfill its mission and realize its aspirations in three ways: (1) communicate the College's distinctive character; (2) build meaningful internal and external relationships; and (3) secure and steward human and financial resources.

THE FUTURE OF COLLEGE ADVANCEMENT

Our Aspirations

The College Advancement staff will be a productive, effective and trusted team of professionals driven by a desire to serve the best interests of St. Norbert College and its constituents while also being recognized on campus and throughout the Midwest as a model advancement program.

The College Advancement staff also endeavors to encourage a culture of philanthropy among the College's students, employees and other stakeholders, thereby inspiring generosity toward St. Norbert College and toward other deserving organizations and causes.

Our Environment

College Advancement will be an enjoyable, rewarding place to work that offers personal growth and development, where reasonable mistakes are accepted as learning opportunities, colleagues are valued as equals, collegiality is expected and a sense of humor is a cherished attribute.

Characteristics of the College Advancement Team

1. Committed to the College's mission and its Catholic, Norbertine, liberal arts heritage
2. Participate fully in the St. Norbert College community
3. Dedicated to teamwork, both inside and outside of College Advancement
4. Goal-driven and results-oriented
5. Dedicated to excellence and accuracy in all that we do
6. Responsive to our constituents, both inside and outside the College
7. Compliant with College policies and measured by industry standards
8. Responsible developers and stewards of College resources
9. Trustworthy
10. Teachers and exemplars of the value—and joys—of engagement, service and giving

Cornerstones of the College Advancement Program *(Adopted 2004; revised 2006)*

The ability of College Advancement to fulfill its mission, realize its aspirations, and achieve its ambitious friend-raising and fundraising goals will be based upon twelve core elements:

1. Strategic **advancement communication** activities that use technology, creativity and professionalism to promote St. Norbert College's distinctive character.
2. An unprecedented new commitment to serve and engage **alumni and parents**, by which we will draw them closer to the College and to one another, as well as tap their ability to assist in areas such as admission, career planning, public visibility and fundraising.
3. A far-reaching **annual fund** that increases budget-relieving dollars and develops a culture of philanthropy among students, parents, alumni, staff and other constituents.
4. A resourceful and efficient gift program that stimulates annual donors to upgrade their philanthropic giving to St. Norbert College with **major gifts**, which yield benefits for today, and **planned gifts**, which yield benefits for tomorrow.
5. A full-service **grants** program that provides encouragement and support to faculty and staff who seek funding for sponsored research and other scholarly activity, as well as leadership in securing funding for college-wide priorities.
6. A comprehensive **donor relations** program that ensures every gift to St. Norbert College is stewarded well and that all donors feel their contributions make a difference.
7. Programs that motivate and engage **volunteers**—Trustees and other friends—in strategic initiatives to expand the College's reach, such as recruiting and retaining students, facilitating internships and job placements, connecting with alumni and fundraising.
8. A purposeful **community relations** program that engages local corporations, organizations and neighbors to serve in an advisory capacity on issues facing the College and as an ambassadorial link to the greater Green Bay community.
9. Ongoing participation in **training and professional development** opportunities—as presenters and attendees—to keep abreast of the latest trends in the field, build network relationships and help raise the profile of College Advancement as a model program.
10. Strong **data and information management** that enables effective communication, programming, fundraising and accountability.
11. Meaningful, realistic **measures of performance and accountability**.
12. A **Strategic Funding Initiative (SFI)** to secure the financial resources—endowment, capital and operating—needed to advance the mission of St. Norbert College.

COLLEGE ADVANCEMENT THEMATIC GOALS 2007-08

I. Thematic Goal: Complete Library Fundraising

A. Defining Objectives: Identify top prospects
Assemble core team
Develop strategies for top prospects
Prepare ancillary materials and resources
Set recurring core team meetings for reporting and accountability
Secure new commitments

B. Metrics: Names of top 12 and second 16 prospects
Names of core team members
Written action plans indicating who is responsible for what and when
Key messages and brochures developed and visitor transportation scheduled
Schedule of meetings and minutes summarizing progress and outcomes
New commitments meet or exceed \$7.0 million

C. Time Frame: Seven months (June 1 to December 31, 2007)

- II. Standard Operating Objectives:**
- A. Secure and steward gifts in support of the College's top fundraising priorities:
 - With an 85% LYBUNT renewal rate in the St. Norbert Fund, realize \$1.9 million in unrestricted operating funds (\$1.7 million in annual fund cash and \$200,000 in bequest expectations)
 - Raise \$1.0 million in new commitments to support College endowments
 - B. Provide college-wide opportunities for alumni engagement, highlighted by the PRIDE initiative:
 - Inform and connect the St. Norbert College community through various forms of print and electronic communication
 - Be an on-going presence for alumni in the St. Norbert Community of Chicago, Madison, Milwaukee, Minnesota, and Northeast Wisconsin
 - Establish student awareness and involvement in alumni opportunities
 - C. Strengthen the capacity of staff and volunteers to successfully engage in friend-raising and fundraising:
 - Keep abreast of new techniques and developments in the field
 - Recruit, organize, train, and utilize staff and volunteers to support key programs and initiatives
 - Find ways to fill programmatic gaps: planned giving, parent fundraising, community relations and programs and volunteer support

III. Next Thematic Goal: Complete Fundraising for New Outdoor Athletics Complex