

GOAL #3 STATEMENT: Increase fundraising initiatives including grants and contracts

Discussion highlights (if any): The focus is to build strong allegiances, close relationships, advocates for the University, and a strong volunteer base amongst Alumni, parents, Community, and friends of the University (Which includes Corporations and Foundations). This will be done with both short term and long term goals -- in order to provide current use money for today's students, and endowment money to secure the future.

The annual strategies are conservative based on the recent loss of the Asst. VP for Development, as well as a six-month lag in hiring of the Assistant Director, Stewardship and Advancement Services position, and an ongoing assessment of AUR operations. Additionally, given the current financial situation of the Westfield State Foundation, significant efforts are necessary in order to secure the Foundation's position, and to streamline its operations relative to its growth. Additional revenue generating strategies will be added as staffing returns to full levels.

Key Strategy or Initiative	Specific Actions	Responsible department/person	Implementation milestone	Resource Requirements	What results? How will we assess and hold ourselves accountable for making progress?	Progress Update April-May 2011
1. Complete Review of Foundation Operations	<ol style="list-style-type: none"> Sustainable annual spending plan Improved documentation of endowed scholarship funds Restructure of P/Res and T/Res funds to allow sustainable scholarship spending to best benefit students Complete review of foundation by-laws to match mission and current size of foundation and assets Re-engagement of the Foundation Board of Directors Recruitment of New Board Members 	Ken Lemanski w support of -Brent Bean -Dave Caspole -Aaron Walker -Julie Phillips -Waleska Lugo DeJesus -and New Staff	Endowed funds policy approved in Nov Scholarship Documentation by March 30 By law review completed and implemented by FY 11 year end meeting 5 new board members approved by FY 11 end	Staff Time, New Hire(s), Appropriate Funding, Engagement of Board	Milestones hit on schedule Sustainable spending met for FY 11 All Scholarships paid through T/Res funds for Academic year 11-12	Spending plan enacted and add'l oversight with help of John Wesolowski as acting Fnd. Dir. Ongoing updates to sch documentation, Abar, Gravel, completed Ongoing fund restructuring on ad-hoc basis with various scholarship donors and committees Bylaw review in progress
2. Preserve gains from FY 10 Giving in light of economic climate (-11% in FY 10 for major charities) and significant staff changes in Development staff for first two quarters of FY 11	<ol style="list-style-type: none"> Complete Campanella review and fill vacant staff slots Add any necessary new staff Continue with mail and phone programs as proscribed Increase board giving and participation 	<ol style="list-style-type: none"> 1-2. Ken Lemanski 3. Dave Caspole to manage phone and mail annual giving 4. Dave Caspole/Brent Bean/Olen Bielski/New Hire 	Full Staffing by 1/1/11 Aaron Walker Hired 10/18/2010 (Stewardship and Adv Svcs)	College funding of vacant/new position Continued resources (\$)allocated to print mail Funding for select travel for major gift solicitations	Year end and quarterly review of annual giving	New CDO Don Bowman hired in April – Does not begin until July 1 Phone and mail programs ongoing, subject to foundation budget cuts Fnd Dir position as yet unfilled
3. Increase unrestricted	<ol style="list-style-type: none"> Purposeful direction of donors to unrestricted gifts in phone mail and 	- Dave Caspole/Ken Lemanski/New Hire	Changes to fall mailing 10/30/2010		Percentage of unrestricted gifts by end	Fall mailing and spring solicitations focused on

giving component of annual gifts	major gifts				FY 11 Cash flow for Foundation throughout FY 11	unrestricted giving
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