UNIVERSITY ADVANCEMENT

OVERVIEW, INITIATIVES AND GOALS | FY17-21
Eastern Washington University, its Advancement program and the EWU Foundation are at an important moment in time. Eastern is poised to greatly expand its reach and impact on students and the region. Advancement and the EWU Foundation exists to support the University as it leads boldly into the future. By increasing awareness of, engagement in, and giving to Eastern, Advancement and the EWU Foundation will open doors of opportunity for students, faculty, alumni, friends, the community and the region. The combination and coordination of communication, engagement and fundraising efforts are critical to the University’s success.

Both Advancement and the EWU Foundation have built a solid foundation and evolved over the past decade. Under the leadership of Dr. Mary Cullinan, we are excited about the opportunities before us to take both enterprises to the next level. Recent investments in the areas of marketing, philanthropy staffing, digital communications and the expanded use of our varied volunteer boards will pay dividends. At the core of these enhancements is a strong university vision and talented administrative team. We are poised.

This document provides an overview of the five-year strategic plan for Advancement and the EWU Foundation fundraising goals over this same period. Of note are the Fiscal Year initiatives for each division within Advancement. This plan will be updated annually to reflect the latest initiatives being implemented in fulfillment of the stated vision and goals throughout.

The talented staff that make up the Advancement team and the dedicated volunteers of the EWU Foundation are committed to the mission of the University and will play a critical role in advancing this plan and making its success a reality. I am ever thankful for their leadership and investment.

Sincerely,

Michael Westfall
MISSION
EWU expands opportunities for personal transformation through excellence in learning.

VISION
EWU envisions a future of professionally, socially and culturally engaged leaders, citizens and communities.

VALUES
- Student-centered learning environment
- Quality
- Access
- Inclusiveness
- Integrity
UNIVERSITY ADVANCEMENT OVERVIEW

ADVANCEMENT MISSION

University Advancement builds a compelling case for choice and support of Eastern Washington University among all of its constituents by communicating and advocating for the university’s distinctive regional position, role and contributions, thus forging relationships and securing commitments required to advance the institution’s mission and priorities.

ADVANCEMENT VISION

Our vision is to be recognized for a pivotal leadership role in:

• Strengthening EWU’s position as a university of choice;

• Generating prospective student interest and affinity leading to continued record enrollment;

• Garnering statewide and national recognition for EWU as a model of educational innovation;

• Stimulating financial investment that ensures the success of the university’s mission and goals;

• Cultivating the university’s most valuable strategic relationships among business, community, educational, cultural and political leaders; and

• Planning and executing record-breaking fundraising efforts.

ADVANCEMENT VALUES

With a spirit of professionalism, and in an environment that encourages teamwork and personal growth, University Advancement commits to these values:

• Excellence: We take pride in our work and strive for the highest quality.

• Innovation: We empower ourselves and others to be risk-takers and reach beyond the current paradigm; we are open to change and creative new ideas in fulfilling our mission.

• Transparency and Accountability: As stewards of the public trust, we ensure that promises to our supporters are fulfilled and hold ourselves accountable for using our resources wisely.

• Ethical Action: We adhere to high ethical standards; we build relationships based on trust, honesty and integrity; and we respect privacy and confidentiality.
Over the next five years, Eastern Washington University Advancement will:

**Increase awareness of and advocacy for the University resulting in broad recognition of EWU’s teaching, learning and service excellence**
- Enhance partnerships that align and amplify marketing and communications;
- Implement brand identity refresh and identity standards;
- Expand and improve content development and delivery strategies to emphasize EWU’s status as a public university that transforms lives;
- Enhance audience segmentation and analytics to deliver the right messages to the right people;
- Protect and promote EWU’s reputation through a proactive approach to issues management; and
- Increase the circulation and saturation of positive stories in regional and national media.

**Expand philanthropic support to the university, raising over $10 million annually by 2021**
- Develop and implement comprehensive fundraising strategies anchored to institutional priorities;
- Enhance pipeline to prepare alumni, donors and prospective donors to make increasingly significant and planned gifts to all areas of the University;
- Extend partnerships across campus to increase productivity and participation in philanthropy;
- Improve donor retention through focused donor relations and stewardship strategies; and
- Increase the quantity of major, annual, and first-time gifts by employing innovative fundraising strategies.

**Broaden and deepen constituent engagement with the University, developing meaningful relationships with EWU’s alumni, friends and students**
- Develop shared engagement strategies aligned with institutional and college priorities and shared engagement services that assist with the work of colleges, units and volunteers;
- Expand regional strategies to engage alumni and friends around the state;
- Enhance early engagement strategies to strengthen the bond between EWU and its students and young alumni;
- Strengthen ongoing relationships with alumni and friends through volunteer engagement; and
- Increase outreach efforts in diverse communities to leverage new and existing partnership opportunities.

**Enhance the campus philanthropic culture and continue to build a top-performing Advancement organization with an integrated infrastructure and a highly collaborative focus**
- Actively engage campus and communicate the structure and purpose of the Advancement organization;
- Fine tune management systems and policies for better services and stronger results; and
- Invest in efforts to recruit and retain a diverse staff and provide professional development opportunities throughout all career stages.
DIVISIONAL SUMMARY

University Advancement leads an integrated and collaborative effort to develop, communicate and enhance Eastern Washington University’s image and academic reputation; build and nurture relationships with its constituents; and secure philanthropic investment in the university’s strategic goals, its programs and students.

THE MULTIPLE ROLES OF UNIVERSITY ADVANCEMENT ARE FACILITATED BY THE TEAMS OF:

- Advancement Services (Infrastructure)
- Marketing & Communications (Inform)
- Alumni Advancement (Involve)
- Philanthropy (Invest)

TEAM SUMMARY

Each advancement team has at its core the responsibility of nurturing relationships in support of the university. The creation, management and enhancement of the infrastructure team focus areas noted below are integral to the continued investment in and advocacy of Eastern Washington University.

UNIVERSITY ADVANCEMENT FOCUS AREAS
Audiences include students/parents, active students, alumni, donors and the community.

<table>
<thead>
<tr>
<th>INFRASTRUCTURE</th>
<th>GIFT PROCESSING</th>
<th>REPORTING AND RESEARCH</th>
<th>FOUNDATION ACTIVITIES</th>
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<tr>
<td>INFORM</td>
<td>MARKETING AND BRAND PROMISE</td>
<td>INTERNAL COMMUNICATIONS</td>
<td>EXTERNAL COMMUNICATIONS</td>
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<td>ALUMNI &amp; UNIVERSITY EVENTS</td>
<td>ADVISORY BOARDS</td>
<td>ANNUAL FUND</td>
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<td>INVEST</td>
<td>STEWARDSHIP PROGRAMS</td>
<td>MAJOR GIFTS</td>
<td>PLANNED GIVING</td>
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The mission of the Advancement Services Team is to provide infrastructure support to all administrative functions of University Advancement and the Eastern Washington University Foundation.

The role of the Advancement Services Team is to manage state budget allocations and donor funds, respond promptly and accurately to requests regarding the status and transfer of donor funds and to prepare or support the preparation of financial statements, gifts activity and fund reports.

THE WORK OF THE ADVANCEMENT SERVICES TEAM INCLUDES:

- maintenance of the alumni/donor database;
- gift acceptance and receipting, as well as donor acknowledgment, for all philanthropic contributions;
- maintaining up-to-date alumni/donor data and reports;
- establishing and maintaining varied fund accounts;
- providing financial statements to account holders, boards and leadership;
- timely transfer of available funds via disbursements to benefiting units; and
- annual transfer of endowment payouts and reports to the university.

THE PRIMARY INITIATIVES OF ADVANCEMENT SERVICES ARE:

Gift Processing

- Track donor gifts for campaign, solicitation and use;
- Strengthen donor relationships by reporting, responding and thanking donors for all financial support; and
- Assist with university events to make sure all compliance is met while still being innovative and financially savvy.

Reporting and Research

- Develop reporting that identifies lapsing and threshold society donors;
- Increase screening activity to enhance pool of prospects; and
- Provide donor background and history university-wide for those developing donor relationships.

Foundation Activities

- Analyze all foundation accounts to identify efficiency and impact opportunities;
- Maintain endowment tracking software package and underwater endowment strategy; and
- Maintain short-term cash management strategies.

FY17 INITIATIVES

- Develop a plan to implement gift fee infrastructure for FY18
- Successfully complete annual audit
- Create process where all changes to the production environment of Millennium are done through documentation and testing before implementation
- Replace SSNs with Lexus IDs to remove risk of compromised data
- Batch graduate and parent data through Lexis Nexis and importing updated information into Millennium
- Increase service outreach to campus units
The mission of the Marketing & Communications Team is to INFORM by increasing awareness of Eastern Washington University, helping shape and enhance the university’s image and advance its objectives among all of its constituencies through integrated, strategic communications.

The role of the Marketing & Communications Team is to develop strategies, create standards and produce a wide range of communications in support of key university priorities and initiatives, including fundraising, brand marketing, external visibility, internal awareness and student enrollment and retention.

THE WORK OF THE MARKETING &COMMUNICATIONS TEAM INCLUDES:

- social media strategy implementation;
- production of development publications;
- public and media relations engagement;
- alumni publications including Eastern magazine;
- implementation of advertising, awareness and advocacy campaigns;
- engagement with Admissions on recruitment publications and marketing collateral; and
- emergency communications.

THE PRIMARY INITIATIVES OF MARKETING & COMMUNICATIONS ARE:

Marketing and Brand Promise

- Inspire and empower Eastern’s internal constituents to shape their daily activities, decisions and interactions around the university’s promise;
- Informing and involving internal audiences; and
- Ensure consistency of message, look and feel.

Internal Communications

- Provide outstanding customer service to internal clients;
- Supply the campus community with quality, timely tools and ideas necessary to live the brand, gain private support, recruit and retain students; and
- Utilize Eastern 24/7 online campus news site to inform, engage and involve the campus community.

External Communications

- Develop marketing collateral in support of fundraising efforts;
- Continue to leverage campus publications to tell the Eastern story; and
- Expand use of digital strategies and monitor analytics.

FY17 INITIATIVES

- Establish digital communications team
- Implement EWU website redesign
- Provide marketing support for Inspire Awesome Scholarship Campaign
- Initiate EWU brand refresh
The mission of the Alumni Advancement Team is to INVOLVE alumni by cultivating lifelong relationships through event participation, advocacy and annual giving — all in support of Eastern Washington University.

The role of the Alumni Advancement Team is to create opportunities to connect and/or maintain relationships with current and future alumni; provide support for the Eastern Washington University Alumni Association, including their Board of Directors and events; create innovative strategies to provide additional value and benefit to the EWU alumni experience; and to increase gifts, pledges and annual donors in support of students and programs.

THE WORK OF THE ALUMNI ADVANCEMENT TEAM INCLUDES:

- targeted events;
- Alumni Association board development and management;
- alumni website and online community and social network management;
- awareness and advocacy campaigns; and
- direct mail, e-campaigns and telephone campaigns.

THE PRIMARY INITIATIVES OF ALUMNI ADVANCEMENT ARE:

Alumni and University Events

- Continue to refine target events that showcase EWU, enhance relationship building and increase pride;
- Leverage events to generate revenue and support; and
- Continue to leverage athletics for event participation.

Advisory Boards

- Work with the Alumni Association on strategies to communicate legislative awareness;
- In conjunction with the Alumni Association, maintain alumni online communities and social networks; and
- Continue to identify initiatives in which the Alumni Association membership can take an active participatory role.

Annual Giving

- Enhance annual giving and participation strategies;
- Develop pipeline for transitioning annual donors into major gift donors; and
- Create reporting “real-time” infrastructure that identifies lapsing donors.

FY17 INITIATIVES

- Create and implement a “Giving Day” for EWU
- Expand FundEWU online giving program
- Create giving pages for each college
- Coordinate fundraising and engagement activities in support of Teacher of Month
The mission of the Philanthropy Team is to develop and implement comprehensive fundraising strategies for qualification, cultivation, solicitation and stewardship of gifts and pledges of $10,000 or more from individuals, corporations and foundations.

The role of the Philanthropy Team is to identify donor interest and to match that interest with funding needs throughout the university and to organize stewardship programs for both current and past donors.

THE WORK OF THE PHILANTHROPY TEAM INCLUDES:
- qualifying, cultivating, soliciting and stewarding alumni and friends;
- donor communications; and
- donor recognition initiatives.

THE PRIMARY INITIATIVES OF PHILANTHROPY ARE:

Stewardship Programs
- Implement strategies that focus on enhanced stewardship activities;
- Enhance opportunities to recognize lifetime giving society donors, including planned giving and consecutive years giving; and
- Utilize reporting structure that identifies lapsing donors and giving society threshold donors.

Major Gifts
- Develop fundraising plans for presidential priorities and other supporting priorities;
- Create marketing collateral in support of priorities;
- Continue to increase visit activity including qualification visits; and
- Enhance strategies and infrastructure for greater involvement of deans.

Planned Giving
- Increase total planned giving expectancies to more than $10 million annually;
- Increase procurement of charitable gift annuities to a minimum of four (4) annually;
- Continue planned giving education initiatives; and
- Expand marketing of 401(k) rollover option.

FY17 INITIATIVES
- Finalize and implement fundraising plans for presidential initiatives
- Finalize and implement presidential engagement plan in support of fundraising
- Create and implement planned giving plan for Eagle Athletic Fund donors
- Complete infrastructure transition in support of fundraising priorities
- Implement new fundraising support infrastructure in support of colleges and deans
EWU FOUNDATION

The Eastern Washington University Foundation (a 501c3) is responsible for all fundraising activity on behalf of Eastern Washington University and the prudent management of resources secured for the benefit of the university’s mission.

The Foundation is accountable to its constituencies; to its Board of Directors (who serve without remuneration and at their own expense); to Eastern Washington University and its leadership, faculty, staff and students; to its donors; to its volunteers; and to the Advancement team. One of the ways in which the Foundation is accountable is by making materials accessible to those that care about the mission and success of the EWU Foundation. These resources can be found at www.ewufoundation.com.

The Foundation’s directors provide external oversight of the Foundation’s operations. The EWU Foundation is governed by a volunteer board of directors with business, civic and legal expertise, a majority of whom are EWU alumni. Representatives from the EWU Board of Trustees, Alumni Association and University leadership also serve in varied capacities. The EWU Foundation employs the practice of a strong working-committee structure.

FY17 INITIATIVES

- Expand use of Fundraising Committee and increase philanthropic activity of board
- Initiate RFP for audit services
- Reinstitute an annual report for the EWUF
- Expand the board membership to 26 directors
- Initiate planning for next year’s 40th anniversary of the EWUF
- Implement evaluation strategies for director participation and quarterly meetings

EWU FOUNDATION FIVE-YEAR FUNDRAISING GOALS

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