University Planning Group Minutes
December 14, 2011

Time: 1:00 p.m.
Location: CAS Conference Room, 140 KFA
Present: Fernando Delgado, Michael Harris, Stacey Stoffregen, Brian Schultz, Jim Madsen, Mike Miller, David Trechter, Tynan Heller
Absent: Mark Meydam, Mike Stifter, Hossein Eftekari, Kurt Leichtle, Wes Chapin, Gregg Heinselman, Steve Kelm, Tyler Halverson

Agenda Items
LTP Initiative Presentations
- Chris Mueller, Executive Director of University Advancement
  - Goal 10: Campaign Plan & Chancellor’s Circle
- Amy Christensen (for Blake Fry), Marketing Specialist
  - Goal 6: Implement Phase 2 of Marketing Campaign and Measure Campaign Effectiveness

Chris Muller, Goal 10
- Mueller thanked everyone for the opportunity to come in and speak as he likes to talk about this type of thing. He is approaching the sixth month mark of his time here. He continued to state that as everyone knows within higher education some things move at glacial speed while others at super speed.
- Mueller’s first task was to put together a fundraising campaign. The feasibility study conducted in the spring was very helpful for this purpose. The study helped outline the attitudes of potential donors- how much they were likely to give and where they would give this money.
- UWRF has made two primary commitments for funding- HHP and Falcon Scholars.
  - Need to raise roughly $2 million by March 2013 for HHP. Mueller realized on his fifth week on the job that they need to raise approximately $100,000 per month to reach this target.
  - HHP is proving to be a learning experience. In future, if want to build a new science complex with the current budget situations, UWRF will probably need to raise 25% of the cost.
  - Falcon Scholars will grant $1000/year to 80 freshmen for four years. Each year the program will add 80 freshmen.
- Communication with donors about Falcon Scholars has shown that donors are interested in higher level scholarships. They would like to support a student at $5000 rather than $1000, for example.
- The campaign does have secondary projects it aims to assist. An example is the upcoming CAFES centennial.
- People want to be more involved/engaged with the university before they donate.
Research has shown that it takes nine intentional contacts before a person is interested in donating a significant amount. Dan McGinty is working on a system to help build those relationships. Mueller noted other UW system directors reported using social media to form connections.

- Part of the work done for Phase II will be to build a targeted phase around HHP and Falcon Scholars, while the other part will be a larger and more comprehensive campaign with goals between $25 and 30 million ($8 million from Phase I, $20-25 million from Phase II) over seven or eight years. The campaign process has been approved by UWRF’s Board of Directors. The campaign does play into the campus’ master plan and strategic plan.

Question/Answer Session

- Do you see an issue in raising the needed money to support Falcon Scholars?
  - Not nervous about the first few years as the campus raises $340,000 annually but will need more large endowment gifts.
- How can we talk about endowments without a return?
  - Endowments are about the long-term investment. Some people get it. Need to ask people and even get people to donate smaller gifts to help in the short term.
- What is the University’s operating assumption?
  - We are trying for 7%. According to David Swensen, for an institution the size of UWRF the return should be 7 or 8%.
- What about an endowed professorship?
  - Ideally an endowed professorship would need $1 million.
- Is Falcon Scholars operating on the assumption that students will only receive the award for four years even if they do not finished in four?
  - As laid out, the commitment to these students is only for four years. If they did end up staying past four years, they would not receive additional Falcon Scholars money. They could apply to other scholarships.
- What type of staff is needed to make these contacts, etc?
  - A full-time development officer, with no other responsibilities, can do between 200 and 250 visits a year. For UWRF to hit its target, would probably need a pool of 700 or 800 prospective donors. With current staff, including Mueller, can probably reach 400-450. May need to increase staff.
- How do we balance the need to get out and reach people with the amount UWRF takes out of each contribution?
  - Currently there is a 5% tax on gifts and 3% on endowments. Advancement’s largest expense is personnel, mainly classified staff. Of the 12 positions in the office, four and a half are fully funded through UWRF and the office does not receive further assistance. Mueller is looking for ways to lower fees. The campaign budget is an opportunity but need to balance back to $0 in the end. Monday David Swensen understood, as a professional, why UWRF charges 3%, but as a donor, he would not like it and would not contribute.
- Mueller also noted that an event for Falcon Scholars will take place on April 28. This
event will be a fundraiser to publicly launch Phase I of the campaign and announce major gifts, as well as work with the Strategic Plan.

Amy Christensen, Goal 6

- Two years ago the Integrated Marketing Committee received a $75,000 budget. The first few years this money was spent on PR ads to generate awareness and interest in the University. This year, certain programs received some of the funds (Diary Science, Biology, Elementary Education, MBA). All had initiatives and received roughly $2,000.
- Diary Science placed ads in popular journals. Also wanted to pull in more international students. Carol Brady attended the World Dairy Expo. Here she established 90 contacts, 102 web contacts, and spoke with 15 students from Fox Valley interested in the 2+2 program. Saw a 40% increase in web traffic over two or three months but do not have a landing page so difficult to pointedly track contact.
- Biology would like to improve the quality of their student profile. Sent mailings to 295 students with the profile Biology was targeting. Thirty of these students applied (10%). It should be noted that Admissions was already targeting these students.
  - These students were not guaranteed acceptance, correct?
    - No, but the mailing was sent to students who were already looking at UWRF and met the criteria.
  - Overall, the number of applicants is down and we are attempting to try different things and build intentional marketing. Common Spot is very internal and we need to better build external message that can help track students but also be user friendly.
- Elementary Education produced a GoTeach ad. A web page was created with program and Admissions information. Admissions now has a live chat option. This site offers webcasts. If individuals sign up, the University then has their contact information for later marketing.
  - It was asked if the team ever thought to mention other high programs when doing these ads as students may not be set on a program.
    - Do not want to dilute message but continue to search for innovated ways to market the University and programs.
    - UWRF’s challenge is that we have some of the legitimately best programs or only programs in some areas but there is a hesitation to break out of historical mold.
  - It was mentioned that all incoming freshmen are surveyed and asked why they chose UWRF. They usually say because of the program and that the reason they decided this was because of the people they connected with during the application process. It was suggested that we work with alum on this.
    - Trying to get tutorials, etc to use and additional help on recruitment (alum, staff, professors). One of the current issues is creating an institutional script because want people to be able to market the entire campus.
Other business

- A member questioned if there were any thoughts on the proposed structure of the body that will replace UPG in the next strategic plan.
- There was also concern regarding the untimeliness of some items on the Faculty Senate agendas and about some things not being on the formal agenda. People are worried that these things are happening in such a way that they are not upfront or inclusive.
- There is frustration with the process.
- Communication Task Force should send out weekly newsletter.
- Timelines do not recognize work culture. Not convenient.

Meeting end time: 2:30 p.m.
Respectfully submitted by Melissa Fitzenberger.