

memo

to: Advancement Committee
York College Foundation Board

from: SC Stokes III
Executive Director

cc: Dr. Marcia V. Keizs
President, York College

date: July 25, 2019

re: Fiscal Year 2019 Strategic Plan Results

Below are the first-year results of the Foundation's 5-Year Strategic Plan (2019-2023). It should be noted that this past fiscal year the major gifts/planned giving and corporate and foundation relations functions were unfilled, thus affecting goal attainment for major gifts.

<u>Goal</u>	<u>Description</u>	<u>Results</u>
1:1	Total Gift Income: from the base year (fiscal year 2018; \$381,718), increase the five year moving average of gift income 15% by 2023. (FY 2019 goal: \$438,976)	107% attainment; \$469,965 raised
1:2	Major Gift Donors: increase the number of major gift donors to 22 by July 2019	86% attainment 19:22
1:3	Lead Gift Prospects: increase the number of qualified prospects by five per year.	60% attainment 3:5
1:4	Planned Giving: complete two planned giving endowments per year. Also realize five bequests per year.	0% attainment
1:5	Annual Giving: increase the participation rate of donors in the following categories: Trustees 100% Faculty/Staff 15% Alumni 5% Students 3%	86.5%; 23:26 8.6%; 126:1,462 .36%; 108:29,960 .47%; 41:8,700
1:6	Friends: from the base year (fiscal year 2018; \$214,052), increase the five-year moving average by 10% by 2023 (FY 2019 goal: \$235, 457).	-13% attainment \$203,946
1:7	Best Practices: capture and institutionalize best practices that can be used broadly with all campus and degree programs.	ongoing; peer to peer solicitations
1:7.1	Integrated Advancement Plan: further the implementation of the comprehensive integrated Advancement Program (began FY' 2018).	ongoing; AESS
1:8	Volunteers: work with the three schools to establish/enhance their advisory boards.	ongoing

2:0	Alumni Realties: recognize students as future alumni and nurture excitement about lifelong engagement with York College	ongoing
2:1	Create and enhance opportunities for alumni engagement in support of York College and promote the benefits of the reciprocal relationship between alumni and York College.	ongoing
2:2	Develop a robust electronically connected community for alumni and students to communicate with each other and with the York College community.	ongoing
2:3	Support and expand career mentoring programs for and with alumni, students and all members of the York College community.	ongoing
3:0	Preserve and enhance the real purchasing power of contributions and provide the College with a stable and growing source of income.	ongoing; spending policy
3:1	Achieve, within acceptable risk levels, a sustainable average total rate of return on the endowment that meets or exceeds the sum of the Foundation's spending (distribution) rate, plus the inflation rate, and management and related fees.	complete
4	Develop operating fund resources sufficient to achieve goals and objectives of the strategic plan; minimize the ---vagaries of changing conditions by identifying multiple sources of income; provide acceptable return on investments in fundraising; provide funding for future expenditures for technology, campaigns, facilities and related infrastructure and other contingencies; and build trust and strengthen relationships with constituents by developing a structure that reflects best business practices.	ongoing
5:0	Stewardship & Compliance: offer exemplary services to our constituents while complying with all CUNY and other external requirements.	complete
5:1	Comply with or exceed mutually agreed upon expectations and standards of CUNY and outside agencies and our constituents.	ongoing
5:2	Adhere to professional standards, monitor compliance with CUNY, federal, and other regulations, perform all business operations in a timely and accurate manner.	ongoing
6:0	Continually evaluate the Foundation's environment and capabilities to assure its ability to meet its strategic goals and objectives. Align individual and organizational capabilities with the strategic mission and focus.	ongoing
6:1	Employ practices that assess, identify, attract and retain trustees whose mission and values are aligned with the Foundation.	ongoing

6:1.1	In year one of this plan, we propose to revise the charge of the Board Development and Nominating Committee to reflect a new level of the rigorousness of the process; to identify two-to-four candidates who meet the new criteria; and to plan and carry out an intentional recruitment strategy.	in process
6:2	Assure that trustees have continuous access to accurate and up-to-date information on matters relating to the Foundation.	ongoing
7:0	Become recognized as a leader among our peers. Create strategic alliances to improve our ability to achieve our mission and goals.	ongoing
7:1	Create communications and activities that facilitate the achievement and recognition of the Foundation's goals and objectives.	ongoing