



# Strengthening the Foundation

# Top Priority

## Develop Revenue Stream to Replace Davis Family Challenge Grant

1. Increase Annual Fundraising
2. Campaign Focused on 40th Anniversary
3. Explore Earned Income Potential
4. Develop In-Kind Gifts to Offset Cash Expenditures

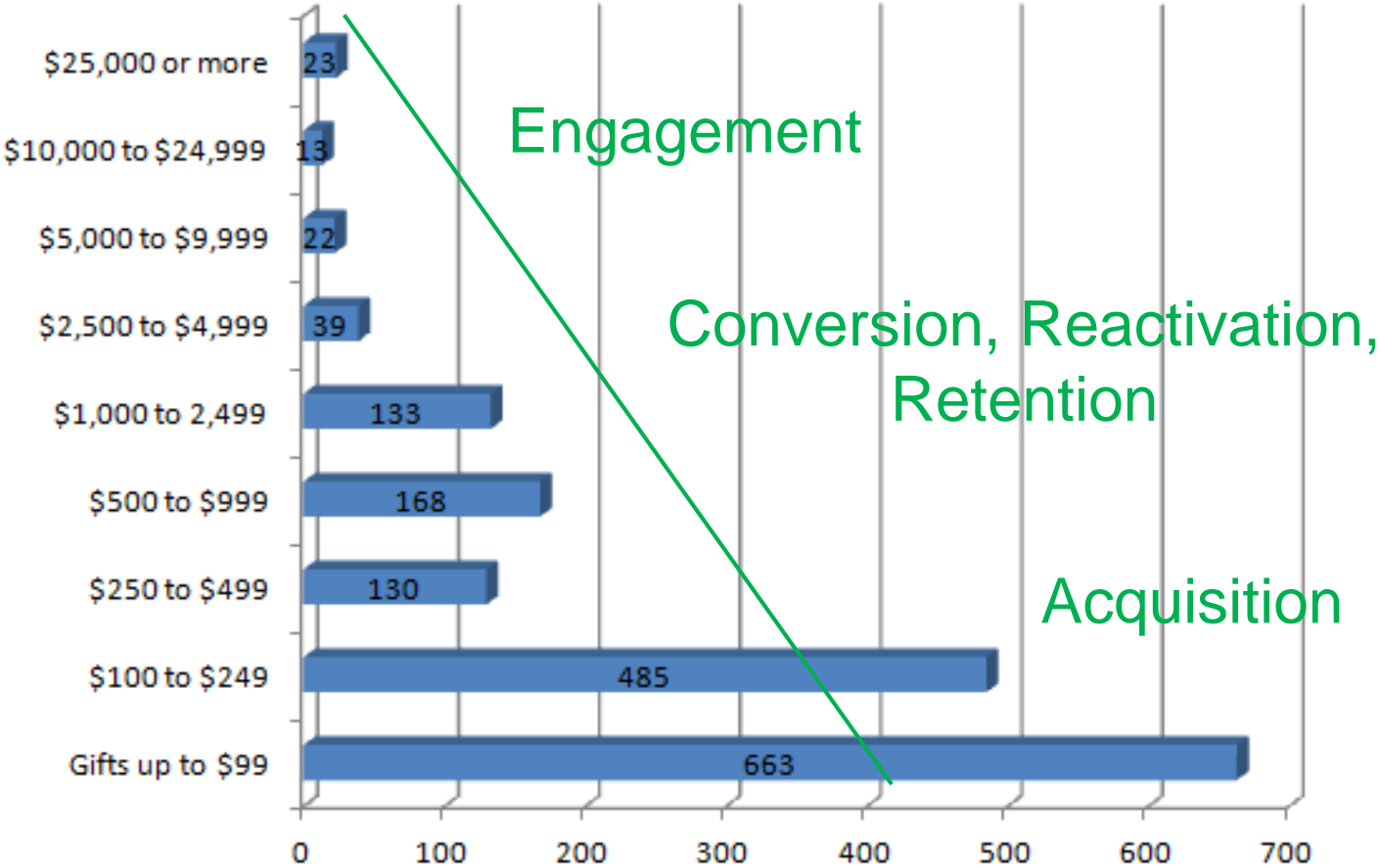
# 1. Increase Annual Fundraising

Develop new revenue stream of \$2 million per year to substitute for the Davis Family Challenge Grant:

- Donor Acquisition
- Donor Conversion
- Donor Reactivation
- Mid-level donor development
- Foundation support

# Donor Profile

FY 2019



# Donor Acquisition

**Key Objective:** Increase the number of donors to UWC-USA:

- Parents of alumni
- Increased Alumni engagement
  - Generational Commitment
  - Special Events, Reunions, Class Agents
- Foundations
- Possible “Look alike” models
- Tax-advantaged giving for non-US residents
- Next generation Davis Family

# Donor Conversion

**Key Objective:** Retain at least 50% of first time donors to UWC-USA:

- Data from the Fundraising Effectiveness Project indicates that just 19% of first time donors are retained.
- Stewardship system of recognizing first-time donors and a cultivation series.
- Invite to participate in monthly giving program
- Reactivation campaign for lapsed donors

# Donor Reactivation

**Key Objective:** As people who have shown an interest in the mission of the UWC-USA and a willingness to give, a primary pool of prospective donors will come from reactivating donors who have not given for a year or more.

- “Lapsed donors” can be reactivated at a higher rate than new donors.
- Possible “reactivation” campaign with match
- Challenges with clarity of location

# Mid-level donors

**Key Objective:** invite donors to increased levels of giving over time and identify donors capable of giving at this level

- Modeling based on donor activity such as longevity of giving, number of gifts per year.
- Additional stewardship interactions:
  - Impact reports
  - Personal follow up, customized to the donor (email, phone, video)
  - Annual conference call with the Chair of the Board or President

# Foundation Support

**Key Objective:** Move from opportunistic to strategic engagement of foundations:

- Opportunities for support for programming and scholarships
- Staffing required to drive sustained effort of research, proposal preparation, provide consistent reporting, etc.

# 2. 40th Anniversary Campaign

## Undertake Campaign Focused on 40th Anniversary

- Target \$20 - \$40 million campaign
- Alumni challenge to Shelby Davis
- Seek Foundation support for campaign for major gifts
- Planned giving

# Planned Giving

**Key Objective:** Engage in targeted campaign to increase planned gifts to the school

- Incorporate planned giving information on UWC-USA website and print materials.
- Relatively small number of donors and the current age profile of the alumni population – high potential impact.
- Develop model to send an annual invitation to alumni and other supporters (e.g. parents of alumni) to remember the UWC-USA in their estate planning.

# 3. Earned Income

Identify a strategy for development of earned income potential:

- Expansion of the UWC-USA summer program, the Global Leadership Forum (GLF)
  - Positive, sustained impact on the revenue stream
  - Support applicant pool for two-year program
  - Increase UWC-USA “alumni”
- IB Teacher training program
- Explore other potential uses of campus

# 4. In-Kind Contributions

Identify opportunities for in-kind contributions to offset expenditures:

- Donations of Consumable supplies (e.g. paper products, cleaning supplies, etc.)
- Donations of durable goods - e.g. mattresses
- Engagement of alumni in volunteer positions on campus

# What Will it Take?

## Build capacity for Advancement

1. Increased Staffing and Travel
2. Development of remote work model/Retention strategies
3. Leverage alumni expertise
4. Excellent communications

# Strategic Communications Plan

## Key Objectives:

- Increase visibility of school to support advancement growth.
- Drive interest from diverse, motivated and qualified applicant pool to support admissions targets.
- Grow income-producing programs of UWC-USA, including GLF and IB Teacher training.
- Align messaging to support strategic plan.