

FIVE-YEAR STRATEGIC PLAN FOR THE DEVELOPMENT ENTERPRISE
FY21-FY25

**Elevate.
Aspire.
Act.**



 UNIVERSITY OF MINNESOTA
FOUNDATION



CROOKSTON

DULUTH

MORRIS

ROCHESTER

TWIN CITIES



“This vision for the future is ambitious. Every member of the University’s development community will be critical to reaching the powerful results we envision. The breadth of expertise each brings to our collective success, along with a belief in our shared purpose, gives us a confident start to the journey.”

—Kathy Schmidlkofer,
University of Minnesota
Foundation President

OUR VISION

A future transformed by philanthropy,
one dream and one legacy at a time

OUR MISSION

To connect passion with possibility, inspire generosity, and support greatness at the University of Minnesota

OUR VALUES

- We place donors at the heart of everything we do and every decision we make.
- We act with integrity, and are accountable to each other, our donors, and the University.
- We build trust through open, transparent communication.
- We lead with bold initiatives that deliver powerful results.
- We share a belief in our mission, value our colleagues, and express joy in our work.



INTRODUCTION

” **Our land-grant heritage is a commitment, lived every day, to ensure that our work benefits Minnesotans and facilitates a just society. Now, more than ever, we must come together to fulfill that commitment and be a catalyst for change.**

– Joan T.A. Gabel, University of Minnesota President

The time is right to consider the future of development at the University of Minnesota. With the end of *Driven: The University of Minnesota Campaign* in sight, we must maintain and grow the momentum generated by the campaign’s success over the next five years, from FY21 through FY25.

Through a collaborative process, the University of Minnesota Foundation (UMF) has created a five-year strategic roadmap for the systemwide development enterprise. The purpose: to build on recent successes, meet future challenges, and embrace opportunities – those we can foresee, and those that will surprise us.

In addition, the [University’s systemwide strategic plan](#) has reached its implementation phase. The UMF strategic plan positions the development enterprise to support the **University’s five strategic commitments**:

1 Student success. Meeting all students where they are and maximizing their skills, potential, and well-being in a rapidly changing world.

2 Discovery, innovation, and impact. Channeling curiosity, investing in discovery to cultivate possibility, and innovating solutions while elevating Minnesota and society as a whole.

3 MNtersections. Inspired by Minnesota to improve people and places at world-class levels.

4 Community and belonging. Fostering a welcoming community that values belonging, equity, diversity, and dignity in people and ideas.

5 Fiscal stewardship. Stewarding resources to promote access, efficiency, trust, and collaboration with the state, students, faculty, staff, and partners.

Though we did not know it when we began our strategic planning process in late 2019, we will make our next five-year journey in a world that is much changed.

In the course of mere months, the COVID-19 pandemic gripped the globe and promised to impact life for everyone, everywhere, well into the future. Then, the life of George Floyd was tragically taken by a Minneapolis police officer. The outrage at Mr. Floyd’s killing and cries for racial and social justice resound at the fore of public consciousness.

These events will help to define our generation. They have impacted our lives and will influence our futures. They will continue to challenge us, and we will need commitment, expertise, and new thinking to emerge in a world changed for the better. We believe the University of Minnesota and its remarkable donors can play a role in this transformation.

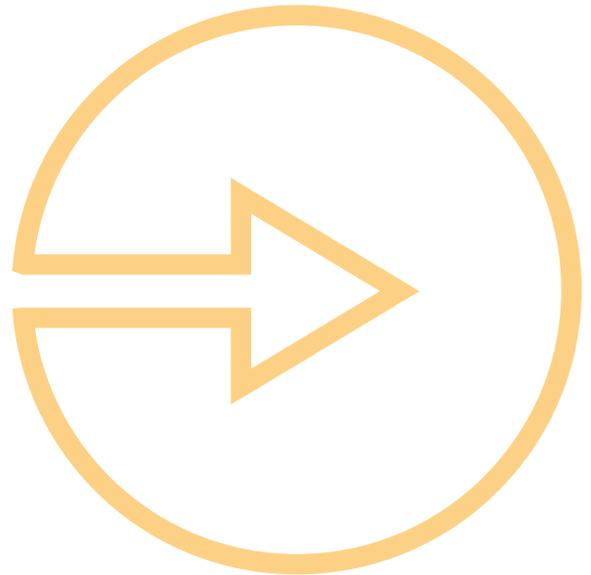
As President Joan Gabel states, “Now, more than ever, we must come together to... be a catalyst for change.” This role overlays everything we do, every imperative and initiative and tactic put in place through this strategic plan.

We must **elevate** our thinking and our expectations, **aspire** to greater outcomes, and **act** in service to the enterprise, the institution, and a better, more just world for all.

POWERFUL RESULTS

As our roadmap for the future, this strategic plan should first show the destinations we expect to reach.

How will we know, after five years, that we successfully achieved this vision? The impact of private investment and its role in advancing the University will be multiplied. Here are our aspirations for 2025.



Growth in philanthropy and private investment

- A multi-billion-dollar comprehensive systemwide campaign has been launched.
- Multiple transformative gifts have been received to advance entire campuses, colleges, and units, including through infrastructure and capital investments.
- In partnership with the University, cost has been removed as a barrier for talented students at all income levels who seek a world-class U of M education.
- The first phase (public plaza) of the East Gateway District is complete.

Inclusive workplace and culture

- Our commitment to anti-racism and social justice is lived in our workplace, as well as through how we do business and who we engage on behalf of the University.
- We are the employer of choice for those seeking a workplace that demonstrates our values, enables high performance, and cultivates a culture of belonging.

Enhanced stakeholder engagement

- Through collaborative, integrated advancement practices, all stakeholders (e.g. donors, alumni, grateful patients, Minnesotans, etc.) have a customized experience based on how they want to engage with the University.
- An optimized volunteer model is in place where volunteers are fully utilized across campuses, colleges, and units.

Operational excellence

- A technology platform supporting the practice of advancement is in place that is sustainable into the future.
- Strategic decision-making is fully operationalized as a result of business intelligence informed by data.
- A financial model is in place that optimizes growth.

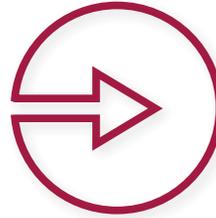
STRATEGIC IMPERATIVES

Reaching those aspirational outcomes requires thoughtful and unwavering guidance. From months of research – which is summarized in the [strategic planning white paper](#) for the development enterprise at the University of Minnesota – four strategic imperatives emerged. These are high-level guideposts that we must remain focused on to reach an even greater level of success over the next five years.

They represent an extension of the three UMF anchors that have helped organize our work in recent years. One thing this process revealed is that we have always been a fundamentally strategic organization; this five-year plan represents more of an evolution than a revolution for University development.

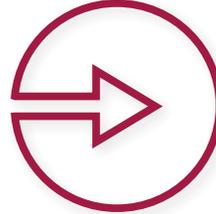
Later in the plan, each strategic imperative is supported by a set of bold initiatives. Some of these strategic guideposts are well-defined, while others are at a conceptual level, inviting us to identify exactly what problem to solve and what role we need to play in the solution.

Finally, these imperatives were created to position University development to play an active role in supporting the University’s systemwide five-year strategic plan. Both strategic plans, which were developed on parallel tracks but with an eye toward informing each other, are beginning their implementation in FY21. More integration and mutual support of the plans will be apparent as operational phases take shape.



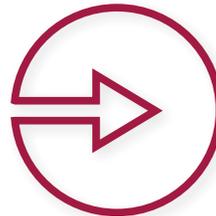
PRIVATE INVESTMENT IMPERATIVE

Transform the future through philanthropy and private investment.



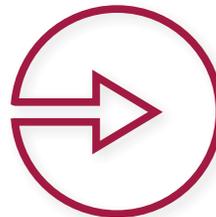
WORKPLACE IMPERATIVE

Be a destination workplace where talented people feel a sense of belonging and build fulfilling careers.



ENGAGEMENT IMPERATIVE

Connect current and future donors to causes that inspire them in ways they prefer to engage.



OPERATIONS IMPERATIVE

Operate and innovate with a drive toward efficiency and excellence.

TRANSCENDENT THEMES

Even though the plan’s format takes a linear approach, with a set of initiatives falling in line with a single strategic imperative, we recognize that some critical themes transcend this structure. These topics may be called out in one or two areas of the plan, but they will influence success on a much broader scale.

Transcendent themes that will impact virtually all facets of our work, across all four of the strategic imperatives, include:



RACIAL AND SOCIAL JUSTICE. Our commitment to anti-racism and social justice will be lived in our workplace, as well as through how we do business and who we engage on behalf of the University.



TECHNOLOGY. Underpinning our ability to achieve this collective vision will be technology tools and platforms that comprise our enterprise-level operational ecosystem.



STRATEGIC PARTNERSHIPS. Strong partners within and outside of the University will be vital to progress toward each of the four strategic imperatives.



ADAPTABILITY. To be responsive to the “next normal” that will impact our work and our lives, we will need to be nimble and flexible as we maintain focus on the goals set out in the five-year plan.

“Development work is multifaceted; it goes beyond ‘fundraising’ as it’s commonly understood. A primary role of the foundation is to promote the interconnectedness that is key to success for the University, its donors, and the communities it serves.”

—Lynn Casey, Chair,
University of Minnesota
Foundation Board
of Trustees



Transform the
future through
philanthropy and
private investment

PRIVATE INVESTMENT IMPERATIVE

Bold initiatives

- ➔ Maximize the momentum of ongoing success to launch targeted fundraising initiatives and a systemwide campaign that supports priorities in the University's strategic plan.
- ➔ Enable transformative change through bold interdisciplinary initiatives that inspire significant private sector investment and lead to lasting impact.
- ➔ Grow internal and external strategic partnerships to achieve mutual benefit and increase private investment.
- ➔ Leverage the M Health Fairview partnership to expand healthcare, medical research, and grateful patient fundraising.

A focus on the core

The initiatives that support this strategic imperative, about our core fundraising function, center on a few high-level ideas that will help us increase philanthropy and private investment over the next five years.

After the great boost and unprecedented coordination of the *Driven* campaign, we want to carry that momentum forward through micro-campaigns to benefit discreet projects. While this plan encompasses strategies and initiatives that are broader than even a single comprehensive campaign, one outcome will likely be the launch of another multi-year, multi-billion-dollar systemwide fundraising effort sometime within the next five years.

We want to emulate recent interdisciplinary success stories such as the Masonic Institute for the Developing Brain to encourage and solidify the big ideas that will inspire further substantial investment for substantial impact. Areas where the University can have significant and meaningful impact *right now* include racial and social justice, and the COVID-19 pandemic. It is incumbent on our institution to put our knowledge and expertise to bear on these issues, and it is the responsibility of the development enterprise to inspire change through generosity.

To make meaningful progress, we'll need to increase strategic partnerships both inside and outside the University. One partnership, with M Health Fairview, will be particularly critical over the next five years and so is called out for its significant potential. The launch of a new fundraising relationship with an academic healthcare system that has a footprint across the state will usher in a breadth of opportunities on a scale that is beyond most partnerships.



Be a destination workplace where talented people feel a sense of belonging and build fulfilling careers

WORKPLACE IMPERATIVE

Bold initiatives

- ➔ Foster an equitable and inclusive culture that attracts, develops, and retains employees who represent the diversity of our broad stakeholder community.
- ➔ Deliver best-in-class strategic workforce planning and talent management processes that ensure the development enterprise achieves business objectives today and into the future.
- ➔ Evolve where and how we work to meet the needs of an increasingly more flexible workforce, enhance productivity, and promote job satisfaction.

Invest in talent, live our values

This imperative focuses on the workplace and how we can build a strong, inclusive culture within the University development enterprise.

The first initiative states a commitment to diversity, equity, and inclusion, and it recognizes the important reasons to advance these values:

- It is a moral obligation and one of the things we must do as our society works to achieve racial and social justice.
- It is critical to building a talented workforce, as employees seek employers that have demonstrated a commitment to building a diverse, inclusive community and culture.
- It is a business priority; we want our organization to reflect the richness and diversity of the stakeholders that are key to our success.

As part of our workplace imperative, a comprehensive talent management plan – for UMF and for staff within the units – will feature great career and leadership development opportunities across the entire enterprise. This includes those in direct fundraising roles, as well as those whose expertise supports fundraising activities as members of the development community.

The third initiative became truer than ever in March 2020, when the COVID-19 pandemic forced us to quickly shift to a remote work environment. We expect flexibility, productivity, and job satisfaction to be major considerations as our culture evolves over the next five years as well.



Connect current and future donors to causes that inspire them in ways they prefer to engage

ENGAGEMENT IMPERATIVE

Bold initiatives

- ➔ Optimize insights and analysis informed by data science to offer targeted interactions to stakeholders across the giving spectrum.
- ➔ Make stakeholder interactions informative, enriching, and streamlined by using a cohesive institutional voice driven by a systemwide approach to advancement.
- ➔ Inspire all Minnesotans and global citizens to engage the University of Minnesota as their charitable, change-making partner.

Meet stakeholders where they are

The engagement strategic imperative is aimed at how we connect with our stakeholders, and it acknowledges that it should be on their terms.

An important part of offering audiences meaningful interactions is understanding their preferences for content and engagement platforms. Together, data and the business intelligence it provides are the cornerstone of this effort, as we become smarter and more relevant in how and what we communicate to our stakeholders.

The second initiative commits to using a more cohesive institutional voice in our stakeholder interactions. By achieving greater communications alignment, we will embrace a systemwide practice of advancement that puts audience needs and expectations at the front of our engagement strategies.

We will rely on close partnerships with the University of Minnesota Alumni Association, University Relations, and campuses, colleges, and units across the system to bring together the unique ways they engage stakeholders into a more unified whole.

The third bold initiative to deepen engagement is to tell the powerful stories that position the University as a true change-making partner. Through existing and emerging channels, we will amplify our inspiring content to current donors and friends, as well as to others looking to have a lasting impact in their state and in their world.



Operate and
innovate with a drive
toward efficiency and
excellence

OPERATIONS IMPERATIVE

Bold initiatives

- ➔ Maintain a growth-oriented, sustainable financial model that supports and accelerates core business strategies and activities.
- ➔ Expand our investment management capabilities and reach to generate high returns that support ongoing spending and have potential to create new and diversified sources of revenue.
- ➔ Innovate operational and technology ecosystems to power our best-in-class development enterprise and distribute UMF's expertise in service to University and external partners.
- ➔ Ensure our systems, policies, and procedures – and the people who create, manage, and work with them – reflect the highest standard of integrity, responsibility, and stewardship.

Committed to a sound infrastructure

This imperative centers on operational innovation and efficiency. The first two bold initiatives in this area focus on the financial infrastructure we will need to accelerate growth and achieve new levels of success: the funding model and the investment strategy.

The third initiative uses a term that may not be familiar to some: “operational and technology ecosystems.” This refers to the platforms that we rely on to do our work, how they interact to share information and data, and, most importantly, the experience they provide to our end users, whether they be internal or external. Our technology ecosystem, for example, includes everything from our DMS constituent database to the FICO marketing platform, which allows for data driven audience segmentation and engagement, to donor-facing tools such as websites and email.

The final initiative under the operational imperative is a commitment to perform our fiduciary duty across our operations and uphold the highest level of responsibility to our donors and to the University. While we recognize that our systems, policies, and procedures must be guided by integrity, we believe that people are at the heart of any organization and their role needs to be articulated as well.



GLOSSARY OF TERMS

In addition to setting a course for the future, the five-year strategic plan is also an opportunity to establish new levels of shared understanding within the evolving field of development. Throughout the months-long process to create and refine this plan, new terms have emerged and new ways to think about existing points of reference have also entered the dialogue. This section highlights some of the terms, and how they apply to our vision for the future.

Advancement practices. The many ways – from communications to events to giving and more – that colleges, campuses, and units engage stakeholders for purposes of moving the institution forward. While advancement practices are long-established and well-used at the University, this plan envisions a new level of coordination.

Development community. The talented colleagues all across the system – those working centrally at UMF as well as those in the colleges, campuses, and units – who support efforts to inspire private investment. Some work directly in development, interacting with donors and pursuing philanthropic goals, while others provide critical expertise to core development efforts through specialities such as information systems, finance, human resources, and marketing communications.

Development enterprise. This refers to the overall business function of development at the University, the main responsibility for which is increasing private investment in the institution.

Private investment. Comprises both philanthropy and forms of investment such as sponsored research and other sponsorship opportunities (e.g. in-game promotions and naming of a facility), made by individuals or organizations that are not government entities.

Technology ecosystem. The platforms that we rely on to do our work, how they interact to share information and data, and, most importantly, the experience they provide to our end users, whether they be internal or external.

RECOGNITION AND APPRECIATION

The process to develop a vision for the next half-decade should be broad in scope, requiring true 360-degree thinking. A wide range of voices is needed to identify and evaluate important topics; every insight must be considered, and sometimes debated. Our strategic planning process has benefited greatly from so many voices who generously gave their time, shared their expertise, and detailed their visions for what development at the University of Minnesota can be. We are deeply grateful to all those who took part in several key ways.

- **UMF Board of Trustees**
The UMF Board of Trustees, through committee work and full board meetings, provided feedback on direction, examined strategic questions, and commented on drafts of the plan. Nearly half of the trustees were also engaged as participants in the stakeholder interviews.
- **Core team**
A small group of eight UMF leaders met regularly to manage the project, performing tasks such as data collection and analysis, process implementation, and communications planning.
- **'Shadow' team**
A group of 12 leaders from the U-wide development community held visioning sessions parallel to those conducted by UMF's executive team to provide a "shadow" perspective on critical topics addressed in the strategic plan.
- **Insights team**
Ten UMF leaders collected stakeholder insights through 95 one-on-one interviews with a range of constituent interviewees, then met extensively to process the feedback and ensure that it influenced the strategic planning process.
- **University leadership**
University President Joan Gabel and her cabinet-level staff, as well as academic leaders and nearly a dozen faculty members, offered strategic insights from multiple vantage points within the University. Other University participants represented the Board of Regents, University of Minnesota Alumni Association, and student leadership.
- **Donors across the spectrum**
More than three dozen benefactors, from campaign committee volunteers to members of the Presidents Club, and from annual giving donors to representatives of companies and private foundations, shared their insights during interviews.
- **U-wide development staff**
Tapping into the wealth of knowledge and strategic perspectives from staff, the process involved the entire University development community. Some participated in the interview process, while dozens of others chose to take part in live feedback sessions. More than 80 responses were received through online surveys seeking feedback on early drafts of the plan.

STRATEGIC IMPERATIVES

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WORKPLACE IMPERATIVE

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ENGAGEMENT IMPERATIVE

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OPERATIONS IMPERATIVE

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BOLD INITIATIVES

Maximize the momentum of ongoing success to launch **targeted fundraising initiatives and a systemwide campaign** that supports priorities in the University's strategic plan.

Enable **transformative change** through bold interdisciplinary initiatives that inspire significant private sector investment and lead to **lasting impact**.

Grow internal and external strategic partnerships to **achieve mutual benefit and increase private investment**.

Leverage the M Health Fairview partnership to expand **healthcare, medical research, and grateful patient fundraising**.

Foster an **equitable and inclusive culture** that attracts, develops, and retains employees who represent the diversity of our broad stakeholder community.

Deliver best-in-class strategic **workforce planning and talent management** processes that ensure the development enterprise achieves business objectives today and into the future.

Evolve **where and how we work** to meet the needs of an increasingly more flexible workforce, enhance productivity, and promote job satisfaction.

Optimize **insights and analysis informed by data science** to offer targeted interactions to stakeholders across the giving spectrum.

Make stakeholder interactions informative, enriching, and streamlined by using a **cohesive institutional voice** driven by a systemwide approach to advancement.

Inspire **all Minnesotans and global citizens** to engage the University of Minnesota as their charitable, change-making partner.

Maintain a **growth-oriented, sustainable financial model** that supports and accelerates core business strategies and activities.

Expand our investment management capabilities and reach to **generate high returns** that support ongoing spending and have potential to **create new and diversified sources of revenue**.

Innovate operational and technology ecosystems to **power our best-in-class development enterprise** and distribute UMF's expertise in service to University and external partners.

Ensure our systems, policies, and procedures – and the people who create, manage, and work with them – reflect the **highest standard of integrity, responsibility, and stewardship**.

Transcendent themes will impact our work across all of the strategic imperatives.



RACIAL AND SOCIAL JUSTICE



STRATEGIC PARTNERSHIPS

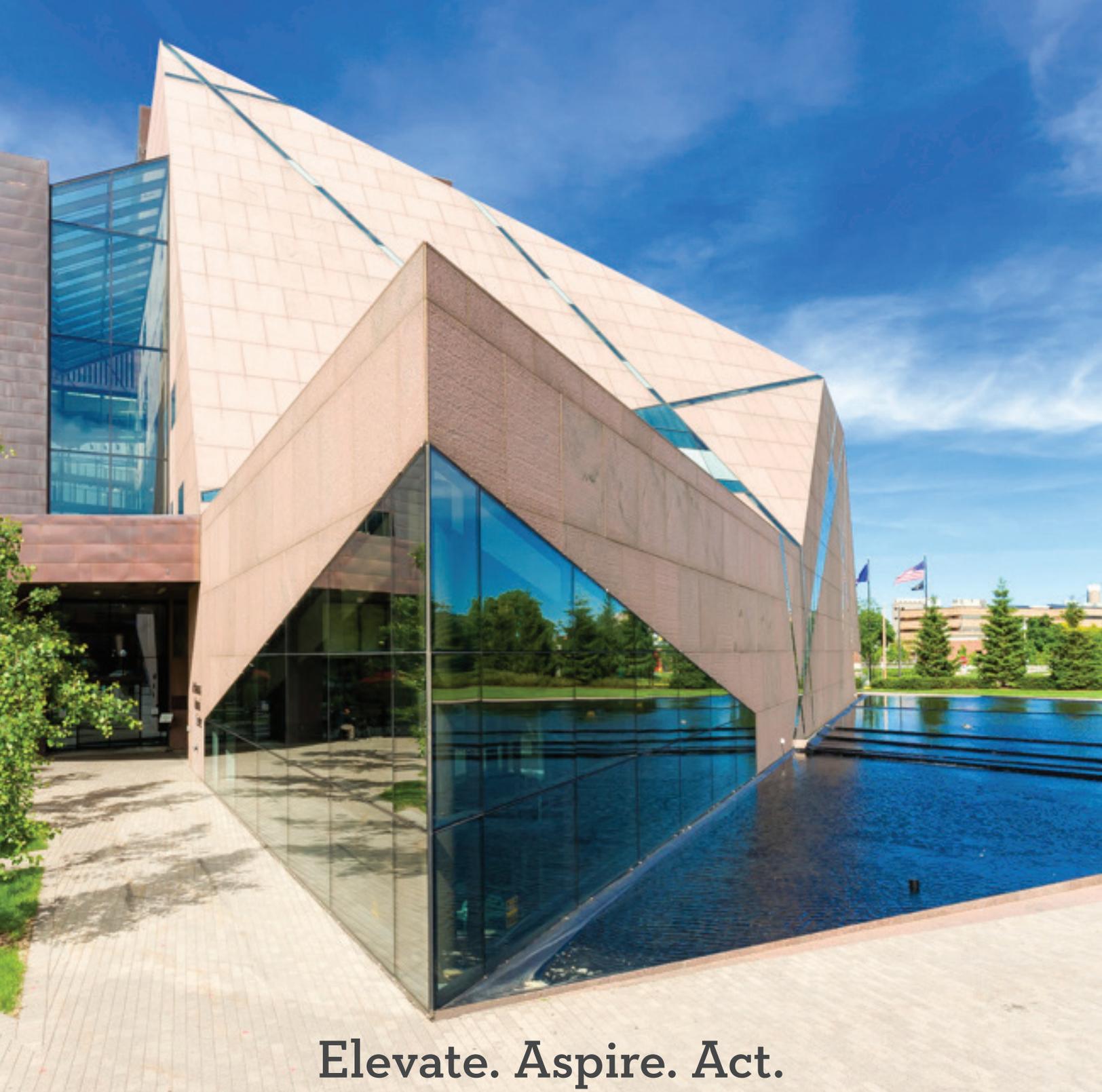


TECHNOLOGY



ADAPTABILITY





Elevate. Aspire. Act.



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