



Southern Arkansas University™  
**FOUNDATION**

**20  
22**

# Strategic Plan





# ABOUT US

The SAU Foundation is centered around stewardship. The Foundation and its investments are overseen by a board of governors who steward and support Southern Arkansas University's fundraising goals on behalf of the donors and SAU. Our board governors come from a variety of backgrounds, with one common thread; sincere dedication to the success of SAU. Members meet quarterly and are led by four officers and six committees.



The SAU Foundation was chartered under Arkansas law in 1981 and is a 501 (C) (3) corporation recognized by the Internal Revenue Service.



Prepared, resourceful, and trusted, the Foundation enhances the future of SAUF and all Muleriders.

# MISSION

Southern Arkansas University Foundation inspires and stewards philanthropic gifts that unite donor passions with University priorities to elevate excellence and achievement of all Muleriders.

# CORE VALUES

- Excellence
- Integrity
- Transparent
- Collaborative
- Innovative

# VISION



# GOALS & OBJECTIVES



Clarify the Identity/Role of the  
SAU Foundation



Improve Scholarship Awarding  
Process and Reporting



Board Engagement and  
Development



Improve Staffing and Resources



Financial Health and Fiduciary  
Roles



Stewardship

# GOAL 1

## CLARIFY THE IDENTITY/ROLE OF THE SAU FOUNDATION

- 1 Revisit and Redefine Mission
- 2 Develop 5-7 Year Vision
- 3 Determine and Define our Cultural Values
- 4 Refer to mission, vision, and core values as a guide
- 5 Review roles and responsibilities of the organization and team members
- 6 Communicate mission, vision, and core values internally and externally



## KEY PERFORMANCE INDICATORS

- The Foundation/University have a clear understanding of the role of each advancement department which clarifies role and responsibility of boards and staff members
- Establishment of mission, vision, and core values directs the activities and relationships of the Foundation
- Better understanding among faculty/staff of the role of the Foundation
- Education of roles of each Advancement entity- Alumni, Development, Foundation to alumni, friends, faculty/staff, and students
- Understanding of roles made evident by donor communication and feedback
- Measurement of how perception changes over time through communication/marketing



## GOAL 2

# IMPROVE SCHOLARSHIP AWARDING PROCESS AND REPORTING

Become more efficient in the award process

Create a more responsive process

Define the role of Scholarships in new campaign

Increase Transparency

Streamline process between Foundation and Financial Aid

All funds are utilized and no money is left on the table

Reduce refunds to students and increase to students paying out of pocket

Review the current requirements within endowment agreements



## GOAL 2

# KEY PERFORMANCE INDICATORS

- Review with board/committee to determine 5-7 KPI's that are most important in the quality of our scholarship program
- Endowment reports include recipient names by a TBD date each year
- Student surveys show the understanding of alumni engagement and philanthropy
- Philanthropy
- Increase donor satisfaction on impact reporting surveys
- Improve donor retention among endowment donors
- Increase confidence and transparency in the awarding process



GOAL 3

## BOARD ENGAGEMENT AND DEVELOPMENT

Review and define board roles and responsibilities

Evaluate recruitment process

Explore openness to incorporate both in-person and virtual attendees

Review and redefine board committees

Complete annual acceptance of board members' roles and responsibilities by board members

Revise and update board member orientation



## KEY PERFORMANCE INDICATORS

- Board member job description
  - Greater awareness of roles and responsibilities
- Increase attendance at meetings and events
- Implement an annual board engagement survey
- Full board membership and even a waiting-list
- Participation

## GOAL 4

# IMPROVING STAFFING AND RESOURCES



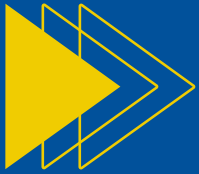
Audit of staffs roles and responsibilities



Develop a culture of professional development and growth that attracts ambitious talent



Create a proven path for professional growth and leadership opportunities



Cultivate a reputation as a team that is composed of advancement professionals



Connect with MPA program and their students who are on the NP track



# GOAL 4

## KEY PERFORMANCE INDICATORS

Track the number of applicants for posted jobs

Professional development opportunities and engagement in those opportunities are tracked

Investment in professional development

Preferred programs, certifications, certificates, etc. are published and shared with team members

Increase number of staff members with professional credentials

Track the reasons for staff members resignation

Increased engagement with and from MPA students

Analysis of current roles and responsibilities to identify overload or opportunities for increased duties

Complete GAP analysis of priorities that are not being staffed

Identify of professional development priorities for each staff member


Recognize Leadership/Growth opportunities within the University

Overcome communication gaps


Set priorities

GOAL 5

# FINANCIAL HEALTH AND FUDICIARY ROLES




Educate stakeholders on the management and investment philosophy of the Foundation



Utilize donors dollars in timely and donor-centric manner




Formalize review of investment policy




Formalize the process and timeline for endowment management review



Formalize review of endowment distribution policy



Conduct annual review of the gift acceptance policy



Annual reviews and revisions/affirmations of policies are conducted



Provide monthly written reports provided to the investment committee



## GOAL 5

# KEY PERFORMANCE INDICATORS

- Obtain a certain percentile of comparable endowments in the annual NACUBO study
- Increase the level of alternative investments
- Improve frequency and quality of investment reports
- Benchmark current policies against peer universities to identify potential weakness
- Adjust to a changing risk environment
- Review timeline for policies
- Encourage input of investment managers into investment policy and endowment distribution policy
- Routinely review of foundation accounts for activity by University departments with reporting on how funds are being used or plans to utilize funds
- Do not utilize principal



# GOAL 6

## STEWARDSHIP

Intentionally staff to increase stewardship

Implement a more personalized approach stewardship

Facilitate donors experiencing the impact and return on investment

Improve connection between donor and beneficiaries

Clarify stewardship plans for giving levels and annual societies

Define roles and responsibilities for stewardship between Advancement and the Foundation

Intentional coordination of outreach to donors between all 3 advancement departments

Increase communication of stories of alumni/donor impact through giving - telling the story/impact

Improve involvement of campus partners in stewardship



# GOAL 6

## KEY PERFORMANCE INDICATORS

- Improve donor satisfaction
- Personal experience
- Donors are connected to beneficiaries
- Stewardship touches increase for all levels of donors
- Increase donor related content in University publication
- Coordinate stewardship between Foundation/Development
- Faculty/staff/administration understand their role in stewardship and are more involved in the process
- Stewardship is staffed appropriately

# CONTACT US



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