2017 Budget and Resource Presentation

DIVISION OF ADVANCEMENT

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VP for Advancement
March 23, 2017
Budget Highlights

• Total budget amount (percent change): 0% change
• Assumptions underlying the budget (e.g., enrollment projections): NA
• List of all major spending allocations (e.g., personnel, capital costs, equipment): No Change
• Management of budget cuts/reductions (e.g., 4% OTPS/S&E All Funds Permanent): See next
• Fee increases, if applicable: NA
• Surplus/deficits, if expected: See next
Budget Highlights

• Management of budget cuts:
  – prudent spending; coming off major surplus; significant return to campus pool

• Surplus/deficits, if expected:
  – Graduate assistant
  – Pre-Campaign expenses (wealth screening, research tool)
Issues

• Critical divisional needs
  – Prep for next Comprehensive Campaign
  – Full-time Communication Specialist (*The Port*, other communication)
  – Gift officer(s)/’Feet on street’
    • School of Business, Athletics, Advancement

• BRC Action Requests
  – Recommendation/endorsement of any new fees, capital expenditures, policy changes, etc. -- NA

• Other
  – Any additional information that is necessary to communicate to the Committee
    • Campaign in 2018-2019
    • Direct alignment with Strategic Plan
    • First major step at Strategic Plan for Advancement at Brockport Foundation meeting on 3/31
    • Proposals for Campaign funds in IF² and IFCN
2017-18 Priorities (1 of 2)

• As they relate to:
  – The Division/Area and its departments
    • Establish Campaign priorities based on Strategic Plan
    • Campaign Consultant; launch Feasibility Study; enhance Brockport Foundation and Brockport Alumni Association boards
    • Renewed major gift outreach; donor acquisition through Eagle Outreach, other programs
  – Areas of Strategic Investment; later slide on IF\(^2\) and IFCN
2017-18 Priorities (2 of 2)

– Assessment: How did assessment information influence resource allocation decisions and support unit goals or objectives?
  • Better and stronger communication needed: The Port
  • Communication other than “asking” needed: The Port

– The College’s Strategic Plan: How is your area bringing unit level planning and priorities into alignment with Strategic Plan 2017-2022, Building a Better Brockport?
  • ALL Advancement activities will be driven by Strategic Plan and next Campaign’s priorities will be driven by Strategic Plan goals and objectives
Use of Resources

(Budget Office to provide reference documents)

• Faculty & Staff FTE
  – Current level – address change from 2011-12 to 2016-17; dropped; end of Campaign
  – Future needs – hiring plans for 2017-18; same; add two or three GOs in 2018-19 (see earlier slide)
  – Position management: goals for numbers of vacancies or salary savings, as appropriate; NA

• Use of Priority Needs Funds
  – Permanent; NA
  – Temporary – please address intent to convert to a permanent budget line; NA

• State Balance Rollover – June 30, 2016; $17,765; gave back $198,681

• Divisional/Area re-deployment or elimination of existing resources; NA
Use of Resources

• Investment and Divestment priorities, including Investment Fund Proposals (IF² & IFCN)
  – Campaign planning: Consultant, wealth screening, research tool
  – Donor acquisition outsourcing
  – Professional Development for Deans
  – Alumni survey outsourced

• Expansion of existing activities
  – Focused major gift work with Deans
  – Full-scale marketing and communications plan
  – Eagle Outreach growth
  – Updated Policies & Procedures
  – Another Winter Gala
• Cross-divisional projects
  – All that Advancement does!
  – The Port
  – Working with Deans and Schools
  – CRM around Economic Development & Outreach
  – Town/Gown Committee
  – Friends of Drake Library

• New budgetary modeling
  – NA
Other Budget or Resource Info (2 of 2)

• Provide a brief description of Divisional Critical Maintenance Needs, Rehab Projects, and/or Capital Plans for the next 5 years.
  – Space issues and potential re-location
    • Allen 3rd floor
    • Allen 1st floor?
  – Alumni House projects
    • Patio Project
    • Painting, porch, trees
Additional Supporting Materials

• Can be included as appendices. None