



Operating Plan 2023

25 October 2022

Executive Summary

What's the difference between success and excellence?

Success can appear out of nowhere. Haven't we all heard of an "overnight success?" During the dot-com boom, hundreds of companies popped up seemingly overnight, each promising to be the "next Amazon.com." They spent lavishly on Super Bowl commercials and expanded quickly, but within a few years nearly all were forced to shut their doors. Success is perishable.

Success is also, often, a result of individual achievement. It can be the product of one hardworking, heroic person. How many times have we seen a great athlete playing on an underachieving team? That individual's performance is remarkable to watch, and they often receive accolades and lavish contracts. But in the end, without a team of equal commitment and capability, one's individual achievements are simply not enough.

Excellence, on the other hand, feels different.

Excellence has staying power. It does not emerge quickly and is not vulnerable to wild swings of fortune. When was the last time you walked into the lobby of the Broadmoor Hotel and thought the place looked shabby? It looks fantastic every time. This level of consistency over a long period of time is one of the marks of an excellent organization.

Excellence is also, always, the product of a team. It is more than the right people doing good work...it is the right people, doing the right things, supported by effective process, sufficient resources, and an exceptional culture. Excellence, then, is the outgrowth of a mature and high-functioning team. In this way excellence becomes durable, almost inevitable.

And we will need to be excellent to face the rising expectations and significant challenges of the coming year. The financial markets have been unkind to investment portfolios (including those of our organization), and while no one can predict our economic future, a recession and continued bouts of inflation could reasonably lay ahead. That means potential threats to our three sources of revenue: **fundraising, service-based revenue, and investment returns**. These conditions also create difficulty in keeping pace with our costs of doing business in an inflationary environment.

All the while, our graduates, parents, sponsors, and Academy expect us to be better and provide more service and support year after year. So, we will have to stay lean and work smart – not waste time or resource on efforts that do not carry a significant "mission return" on our investment.

So, what will be our focus?

Using the results of the Graduate Survey, we will refine our graduate and parent engagement programs, with particular focus on engaging cadets and young graduates during their first ten years. Our aim is to be both **present AND relevant** in the lives of our graduates, especially at key moments in their lives and careers. We will also

deepen our efforts to invite all graduates into Membership of our AOG. Our mission-centered programs and events will increase pride and engagement among all constituents, and our focused efforts will produce greater earned revenue from merchandise, sponsorships, and membership dues exceeding \$2.2 million.

This coming year will also be the penultimate of our **\$270 million campaign, Defining Our Future**. We will raise at least \$35 million to support many projects, including Falcon Stadium, the new Administration Building and the Institute for Future Conflict. We will transform our annual fund and alumni participation strategies through a new partnership with Legends and an enhanced focus on class identity. And we will build a stable platform of future revenue through active discovery of new donors and continued expansion of the Polaris Society.

We will continue improve our home in Doolittle Hall and begin construction on the new Administration Building to the west. In the years to come, this will allow us to bring our full team together onto our 24-acre campus, and to further utilize the capabilities of a world-class alumni house with an expanding and highly engaging Heritage Trail. We will also make significant progress on several capital projects serving the Academy, to include the Madera Cyber Innovation Center, the Red Tail Memorial, and the Space Education Center.

Our team will carefully steward each gift of time, talent, and financial resource. We will uphold our abiding responsibility to every donor and member to **carefully accept, use, and invest** both restricted and unrestricted contributions. Furthermore, we will provide annual reporting to all donors and endowment/fund reports for key donors and projects. And in support of our strategic vision and to demonstrate our unified support for the Academy, we will continue to deepen our partnerships with ARDI, the AFAAC, Falcon Foundation, the Friends of the Library, and with the Academy.

Finally, we will model our mission by providing the best possible culture, workplace, training, and support for the entire team. We will conduct an employee and compensation survey in the coming year and prepare for transition to a single-employer model in 2024, offering a more efficient and competitive benefits package for all employees. And we will build **a culture of excellence** through a posture of continuous improvement and of respect for the contributions of each member of the team.

The coming year will be full and rewarding – I look forward to it.

Happy New Year,

A handwritten signature in black ink, appearing to be 'M. Ma' or similar, written in a cursive style.

VISION

To be an Association and Foundation of influence and impact, supporting the Academy's enduring mission of developing leaders of character for the nation, and providing a lifetime of service to the Long Blue Line.

MISSION

Together, we support the Academy, serve our graduates, and preserve the heritage of the institution.

STRATEGIC PLAN 2023-2028

<https://www.usafa.org/JointStrategicPlan>

Organizational Goals - 2023

- I. Plan and execute mission-centered programs, communications, and events that increase pride and engagement among graduates, parents, cadets, and friends.
- II. Assess and prioritize alumni programs and support in accordance with 2022 graduate survey data results.
- III. Elevate Reunion and 50th Legacy Class program experiences.
- IV. Continue Membership for All Graduates initiative with goal of 95% graduate membership for the Class of 2027 and classes that follow and increase membership throughout the graduate community by 5% in 2023 with a goal of 85% membership by 2028.
- V. Raise at least \$35 million in new cash, pledges, and estate gift intentions with focus on Stadium Modernization, Institute for Future Conflict, Administration Building, North Gate/Visitor Center, and ongoing operations.
- VI. Produce earned revenue from merchandise, sponsorships, and membership dues exceeding \$2.2 million.
- VII. Provide excellent stewardship for every gift, to include providing annual reporting to all donors and endowment/fund reports for key donors and projects. Responsibly invest restricted and unrestricted long-term assets.
- VIII. Achieve milestones for major capital projects including the Stadium Modernization, the Administration Building including the Ring Display, the P-51 Memorial, and the Forevermore Trail. Design and construct Distinguished Graduate Wall, and complete initial design of Heritage Trail expansion.
- IX. Energize and expand our graduate heritage activities to celebrate our history and to inspire Academy supporters.
- X. As a flagship brand and reputation initiative, lead the development and launch of a single website for the AOG and Foundation to communicate our shared vision and mission, deliver value to graduates, and provide a nexus of connection, engagement, and storytelling.
- XI. In support of the recruitment, development, and retention of top talent, conduct supervisor training, employee survey, and compensation survey, and prepare for transition to Single-Employer model by Jan 1st, 2024.
- XII. Cultivate and support activity of both Association of Graduates (AOG) and Air Force Academy Foundation (Foundation) Boards of Directors.
- XIII. Finalize partnership with Air Force Academy Athletic Corporation (AFAAC), Academy Research and Development Institute (ARDI) and Falcon Foundation (FF) to further coordinate and, when possible, combine fundraising efforts.

Alumni Relations and Business Development

The alumni relations and business development team is comprised of three lines of effort committed to reaching the hearts of constituents: membership and sponsorship, alumni programs, and alumni engagement. The biggest trajectory of 2023 will be leveraging the learnings from the 2022 graduate survey and aligning our programs and support with them. We will continue to welcome graduates into their association through Membership for All Graduates and apply additional focus on our young alumni efforts. In addition, we will continually invest into our parent and family memberships and grow cadets' and cadet candidates' understanding of our association, deepening our relationships with the Air Force Academy and Prep School.

Membership and Sponsorship

Defining Goals:

- I. Continue Membership for All Graduates efforts to attain 95% graduate membership for the Class of 2027 and classes that follow.
- II. Increase membership throughout the graduate community 5% every year with a goal of 85% membership by 2028.
- III. Retain Family Plan membership rate at 75% or better for the Class of 2027 and classes that follow.
- IV. Increase awareness of and the case for support for cadet candidate and cadet programs in 2023.
- V. Raise an additional 10% in advertising and sponsorships from our 2022 goal (\$550,000).

Actions:

- I. Reinvigorate marketing efforts encouraging nonmembers to join their alumni association, create value of being a member for all, and continue appreciation efforts for legacy members.
- II. Expand WebGuy program to be more inclusive of all cadet classes and preppies as well as graduate members.
- III. Assess current family plan membership and develop legacy graduate membership program strategy by Quarter 2.
- IV. Improve membership benefits by understanding other top-level alumni association offerings, aligning benefits to graduate needs learned from the survey, and seeking partnerships with organizations sharing our values.
- V. Establish regular battle rhythm for continued communication and strengthened relationship with Prep School and Academy Admissions/Strategic Communications.
- VI. Revamp business development programs to generate an additional \$55,000.
- VII. Negotiate larger contract with premier sponsor to match increased opportunities for awareness.

Alumni Programs

Defining Goals:

- I. Assess and prioritize alumni programs and support in accordance with 2022 graduate survey data results.
- II. Increase young alumni awareness of, and engagement with our association; improve membership rates across all young alumni classes.
- III. Elevate reunion and legacy class program experiences, with improved communication.

Actions:

- I. Perform a cost-benefit analysis of all current alumni programs by Quarter 2.
- II. Prioritize programs (in alignment with survey results) and establish a timeline for updates/revamps as needed by Quarter 3.
- III. Establish young alumni strategy by Quarter 1, empower young alumni ambassadors, and include young alumni considerations in all alumni events.
- IV. Establish first-year post-graduation touchpoint campaign by Quarter 2.
- V. Cultivate young alumni engagement and networking as a co-key priority in the Academy alumni portal.
- VI. Assess current reunion program and establish success metrics by Quarter 1.
- VII. Improve transparency and communication efforts for Legacy Class program and establish standard operating procedures (SOPs).
- VIII. Create regular touchpoints with Academy and Prep School AOCs/AMTs; build rapport and establish trust.

Alumni Engagement

Defining Goals:

- I. Secure our understanding of the graduate community and its needs by evaluating engagement through participation metrics and feedback.
- II. Cultivate graduate understanding of our mission and build trust and deepen pride in our institution and association by improving transparency and communication through distributed channels (chapters, affinity groups, CAS, etc.).
- III. Inspire participation in events, programs, and experiences informed by the 2022 graduate survey and other feedback mechanisms.

Actions:

- I. Leverage the 2022 graduate survey results and partner with marketing and communications to facilitate outreach in the ways that graduates prefer.

- II. Develop an engagement scoring system to track graduate connection to maintain a continuous pulse on graduate needs.
- III. Revitalize the Class Advisory Senate program in partnership with CAS Executive Leadership to update their roles, responsibilities, and operating plan.
- IV. Develop a portal for one-stop-shop engagement and connection, with a targeted roll-out on young alumni and career transitioning graduates in March 2023. In preparation for roll-out, execute a soft launch with chapters and affinity groups in January 2023 and use this to capture initial feedback and grow excitement for the portal.
- V. Form a working group in Quarter 1 with the most engaged presidents (chapters, affinity groups, and ambassadors) to formulate ideas to increase successful outreach with graduates.
- VI. Create and foster a trusted place for graduates to connect and support one another by funneling chapter and affinity group engagement into the portal.
- VII. Create, publish, and successfully market an annual event calendar in Quarter 1 to promote graduate awareness for signature events.
- VIII. By Quarter 2, establish an entrepreneur affinity group and launch supporting programs to foster engagement for graduates.
- IX. In partnership with stewardship and events, by Quarter 2 establish a virtual event strategy/process for the organization that creates a standardized experience of excellence for successful engagement with grads around the globe.
- X. Work with teammates to host events in top region areas to maximize impact and grad engagement.
- XI. Assess current career transition program efforts against grad survey results and feedback and update programs, resources, and services accordingly. In Quarter 1, build a career transition support model for grads to understand how the AOG supports them through career transitions.
- XII. Establish entrepreneurial/VC strategy with events, resources, and connections. Partner with WPAOG in 2023 for Entrepreneurship Conference.
- XIII. Work with history and heritage team to identify and implement solution to deliver class web page/portal with capabilities to include electronic histories and other multimedia artifacts such as audio, video, photo, and e-documents.

Development

With the campaign entering the final 24 months, the development team must strategically increase overall activity, identifying areas where more effort will have the most impact on our goals.

The major and principal gifts team must continue to press on the tempo of prospect identification, cultivation, proposal delivery, and closing. Success and ultimate completion of the campaign will rely on the team's ability to execute strategic and effective gift conversations and gift pipeline development. Further, as we likely approach the \$270M goal toward the end of 2023, we must remain focused on completing fundraising for the top campaign priorities.

The annual and class giving team must find new and creative ways to buck industry trends and increase overall and graduate donor counts. Developing a more robust class and reunion giving strategy will be key to that outcome. Further, with endowment returns down, the need for unrestricted Air Force Academy Fund dollars is more important than ever.

Major and Principal Gifts

The final two years of any campaign pose a challenge as many of the anticipated large gifts are closed. This will put pressure on the development team to increase overall activity as well as complete discovery work this year that could result in a gift prior to the end of the campaign in December 2024.

The primary function of the development staff is to initiate personal interaction with potential and existing principal, major, corporate, foundation, and planned giving donors. Every day, development staff should be in contact with donors (by mail, phone, email, virtually, and in-person) and strategically planning future contacts. The team must remain focused on activity that will lead to visits, proposals, and gifts.

Defining Goals:

- I. As part of the overall \$35 million fundraising goal, raise \$32.15 million in new cash, pledges, and estate gifts allocated to the following pillars:
 - \$1.5 million in new cash and pledges designated for the Founding Director Fund.
 - \$30.65 million in new cash and pledges designated towards Academy, AOG, and Foundation projects. The top priorities for funding are the Institute for Future Conflict, the Falcon Stadium renovation, and the Foundation Administration Building. The new Visitor Center is also a significant priority.
 - \$1.0 million in new cash and pledges from corporate and foundation partners (included in the \$30.65 million above).
- II. Identify funding needed for specific operating activities and establish fundraising goal.
- III. Add 35 or more new households to the Polaris Society.
- IV. Deliver 175 major gift proposals for an aggregate of \$75 million. This is inclusive of executive leadership solicitations.

- V. Directly engage with and support the annual giving team in raising \$2.85 million in new cash and pledges for unrestricted use by the Foundation through the Air Force Academy Fund.
- VI. Identify \$350,000 in challenge and/or matching gifts for 1Day1USAFA.
- VII. Partner with the class giving and prospect management teams to identify and eventually close gifts from 3-5 top prospects for each class project.
- VIII. Plan and execute quarterly Harmon Dinners.
- IX. Work with communications team to update CFR portion of the Foundation website to include articles, informative links, and partnership opportunities.

Actions:

- I. In January 2023, each development officer will review their existing proposal pipeline as well as build out anticipated proposal activity for 2023. Further, each officer will develop their tentative travel schedule for the first two quarters of the year.
- II. Complete the onboarding of two Assistant Development Directors to solidify activity and strategies in the Rocky Mountains and Southeast.
- III. Maintain a national presence covering top regional areas. Primary geographic areas of focus are Washington, DC, Southern California, New York City, Arizona, Dallas, Chicago, Boston, and Colorado. Secondary areas of focus are Houston, San Francisco, Seattle, Austin/San Antonio, Florida, Minneapolis, and Atlanta.
- IV. Complete 900 significant contacts with major gift prospects. Maintain personal contact with 800 major gift prospects with an estimated gift capacity of \$50,000 or more, including 200 discovery visits during the year.
- V. Work with research and prospect management to identify and convert 50 constituents to major and/or planned giving prospects, ensuring a strong pipeline.
- VI. Maintain strong partnership with prospect management including timely and accurate inputs and updates in CRM database, regular communication and meetings about activity, and active participation in bi-annual portfolio reviews.
- VII. By the end of Quarter 1, complete Foundation Building fundraising from the Foundation Board of Directors and identify additional prospects as needed to complete project. Additional needs will be identified when more project details are confirmed.
- VIII. By the end of Quarter 1, re-order and re-prioritize top 50 campaign suspects and prospects to codify an engagement and solicitation strategy to include: actual versus estimated total campaign giving to date, areas of potential interest versus campaign priorities, cultivation, and solicitation strategies.

- IX. Using the board nomination process as a guide and in collaboration with prospect management, identify 10 Founding Director prospects under the age of 55.
- X. In partnership with the AOG and annual and class giving, develop the NextGen program in earnest. Begin by hosting quarterly in-person and/or virtual engagement and networking opportunities.
- XI. Partner with events and marketing and communications teams to strategically use quarterly Harmon Dinners to identify and cultivate new and existing prospects as well as share campaign priorities.
- XII. Strategically use key volunteers including the CEO, the President, members of the Board, and Academy senior staff and faculty, to share Academy, Foundation, and campaign priorities with our graduates, parents, and friends.
- XIII. Continue partnership with stewardship to ensure proper impact reporting is in place for all donors.
- XIV. Partner with communications team to produce appropriate collateral materials needed to showcase campaign fundraising priorities and initiatives. Emphasis on the Institute for Future Conflict in 2023.

Annual and Class Giving

The primary role of the annual and class giving team is to build a strong donor pipeline in order to increase donor engagement and donor growth, as well as to provide critical annual support for the Foundation and key Academy initiatives.

Defining Goals:

- I. As part of the overall \$35 million fundraising goal, raise \$5.35 million in gifts and commitments allocated to the following strategic pillars.
 - \$2.85 million in new gifts and commitments to the Air Force Academy Fund.
 - \$2.5 million in new gifts and commitments for class projects.
- II. Increase alumni participation.
 - Reach 7,500 alumni donors en route to 22% overall giving participation for Defining Our Future Campaign.
 - Retain 85% of 2022 graduate donors (~4,250).
 - Secure contributions from 1,000 previous, but not 2022 (SYBUNTS), graduate donors.
 - Secure gifts from 2,250 first-time donors.
 - Establish method for measuring graduate participation in the campaign (beyond giving).
- III. Increase support from parents and friends.
 - Reach 2,500 parent and friend donors.
 - Retain 75% of 2022 parent and friend donors (~1,675).
 - Secure gifts from 500 first-time parent donors.
- IV. Revamp class giving program to better support goals of Joint Strategic Plan.

- Support volunteer structure by individually contacting each alum in a class project giving window. Secure 1,250 class project gifts.
- Transition 25% of class giving-only donors to the Air Force Academy Fund.

V. Diversify support via successive generations of donors.

- In partnership with development colleagues and the AOG, build a sustainable and engaging NextGen program.
- Engage 125 graduates within 15 years of graduation who are likely to ascend to professional leadership positions with the goal of growing the major and principal gift and board recruitment pipelines.

Actions:

I. Build awareness and engagement.

- Onboarding Legends will allow for improved outreach directly from the grounds of the Academy. This integrated team will engage the key segments below via direct outreach. By the end of 2022, specific outreach and engagement metrics will be set.
- Annual giving must lead the way in educating alumni and inspiring them to contribute to the Academy. This can be done via traditional channels but must also branch into new or lesser used ones. By the end of 2022, the team will work with marketing and communications to create a 2023 content calendar and optimize resources to deploy materials. Focus will be placed on where to reach the key segments listed below.
- 1Day1USAFA will again serve as a day in which philanthropy is the primary topic at the Academy. We will build upon the success in 2022 to strengthen the voice of the Foundation and amplify the stories of impact made by donors.

II. Expand reach with key segments.

- Loyal supporters serve as the foundation of annual giving. Overall growth cannot be achieved if this group continues to decline. The team will take a fresh look at the stewardship and retention program in place and address what elements to improve.
- Young alumni represent the largest population for potential for growth in annual and class giving. In late 2022, a tailored strategy will be developed and then deployed in Quarter 1 to interact, engage, and increase participation.
- While parents do not represent the largest constituent group, they may be the most engaged, albeit for a short period of time. Beginning in Quarter 1, our parent strategy will evolve to prioritize their participation.
- Parents and alumni alike have significant affinity to the class year. The team will work with AOG partners to better leverage a group who is more likely to support their class than the Academy as a whole.

III. Inspire life-long giving through class affinity.

- Beginning in 2023, each entering class will start their fund in conjunction with in-processing. This class start-up will be accomplished passively to allow young classes to make a difference earlier in their alumni journey.

- The reunion giving program will be simplified and consistent beginning in 2023. Timelines for giving and projects will be firm to enhance clarity, organization, and stewardship. It also guarantees that gifts can be celebrated at the class's reunion.
- To build a bridge between giving programs, total class graduate lifetime giving will be rewarded. This will provide an avenue to inspire classes to reach an aspirational level of giving and for gifts beyond class projects.

Prospect Management, Research, and Analysis

Achieving the overarching development goals is only possible when done in collaboration with operations support, which ideally function as an equal partner and collaborator with frontline fundraising counterparts. Prospect research and management is one key area of support operations and is designed to support both operations partners in data analytics, gift processing, stewardship and donor relations, events, and others, as well as maintaining a high-touch partnership with major gift officers and annual and class giving teams.

Defining goals:

- I. Optimize portfolio size and composition for all major gift officers, focusing on pipeline development, accurate and timely moves management, to maximize major gift solicitations.
- II. Continue to build pipeline for the Defining Our Future Campaign through identification of at least 100 new major gift prospects as well as identify NextGen prospects through proactive research.
- III. Ensure donor information from visits and other outreach is retained and updated as appropriate in donor database, and work proactively with partners in gift processing and others to conduct regular data clean-up activities.
- IV. Support development team leadership through regular meetings (monthly or bi-monthly) around top donor and top prospects and communicate wealth events or other information that could impact donor strategy for high net-worth individuals and corporations.
- V. Create donor profiles and event briefing documents ahead of all major donor meetings, including both individual and larger meetings such as Harmon Dinners, to optimize donor events for cultivation and solicitation follow-up.
- VI. Create at least five new fundraiser dashboards to highlight current activity and streamline portfolio review process.

Actions:

- I. In partnership with database team, IT, and others, ensure that donor data is as accurate as possible and reflects standard operating procedures around gift processing, event and stewardship outreach, and others, through regular meetings with the Database Steering Committee as well as ongoing coordination around special projects.

- II. Through bi-annual portfolio reviews (Summer/Winter) and regular monthly to bi-monthly meetings with development officers, set clear priorities within portfolio pools and encourage smaller, more strategic portfolio pools. While still in progress, portfolio sizes are moving towards the following parameters:
- Assistant Directors of Development:
 - Suspect Pools: 50-75
 - Prospect Pools: 75-100
 - Total: 125-175
 - Sr./Development Directors:
 - Suspect Pools: 25-50
 - Prospect Pools: 75-100
 - Total: 100-150
 - Sr/VP Development Director:
 - Suspect Pools: 0-25
 - Prospect Pools: 50-75
 - Total: 50-100
- III. Proactively identify new, unassigned donors utilizing research tools, news alerts, and relationship mapping to support pipeline growth, and communicate regularly with major gift officers around leads.
- IV. In partnership with data analytics, create robust, user-friendly dashboards to show real-time portfolio metrics, including portfolio penetration, distribution of prospects across stage, and track giving from prospect in each portfolio.

Marketing and Communications

In 2023, marketing and communications will continue to play a vital role in ensuring all communications and touchpoints are unified in voice, aligned to brand and mission, sophisticated in look and feel, and audience-centered. We will further-develop and deepen our partnerships across all departments to ensure success in increasing engagement, philanthropy, pride, and participation. We will be engaged partners with our colleagues on the Hill, as part of our commitment to supporting the Academy. Although a talented team, we know that additional processes must be developed within our high-performance department to sustain excellence, efficiency, and stellar results. In 2022, we implemented multiple new processes and policies; this work will continue into 2023.

A signature initiative in 2023 will be a full-scale effort to enhance our digital presence, including the planning and launch of a single website for the AOG and Foundation – a big-ticket project most likely requiring a branding and marketing firm to work with us.

The team will continue to be engaged, thoughtful partners in helping the organization and, as necessary, the Academy in navigating crisis communications matters.

Defining Goals:

- I. Across the “wingspan” of the enterprise, bring best-practice marketing and communications strategies and tactics to advance the organization’s new mission and the engagement, philanthropy, stewardship, communications, and organizational excellence imperatives.
- II. Enhance and safeguard the brand and reputation of the AOG and Foundation, including through the launch of a new joint website.
- III. Share the story of the Academy and its graduates in diverse, imaginative, and effective ways.
- IV. Maintain readiness for successfully navigating crises and adverse developments; use best-practice approaches.
- V. Ensure excellence in all we do through new processes that boost efficiency, reduce friction, and foster optimal results. This includes policies for how we manage publications and our digital activities.

Actions:

- I. Coordinate production and messaging of communications to external audiences to ensure mission alignment, consistency of voice, branding, editorial guidelines, and synchronized scheduling (content calendars).
- II. Lead and execute an aligned communications plan for the organization’s new mission and vision, ensuring thoughtful approaches with all audiences.
- III. Explore benefits of rebranding the AOG and Foundation; develop recommendations and roadmap as needed in 2023 for potential 2024 implementation.

- IV. Per the Tech Efficiencies Plan, and as a flagship brand and reputation initiative, lead the development and launch of a single website for the AOG and Foundation to communicate our shared vision and mission, deliver value to graduates, and provide a nexus of connection, engagement, and storytelling. This project will likely require a firm to work with us to ensure success.
- V. As a benefit of membership in the AOG for new members, enhance the Checkpoints digital experience as part of the development of a new joint website.
- VI. Continue to refine Checkpoints as the flagship alumni magazine for the Academy. Focus on enhancing digital experience, more emphasis on photography, and improvements to the structure.
- VII. Ensure ongoing incorporation of campaign themes into the four issues of Checkpoints (print and digital), including articles about the ideas underpinning Defining Our Future, donor spotlights, call-out boxes with campaign information, and videos.
- VIII. Produce publications and videos highlighting campaign priorities, key donors, and progress/milestones. Priorities for 2023 include Institute for Future Conflict, the Tuskegee Airmen static display, and ongoing Falcon Stadium modernization support. Bring thought partnership to achieve communication strategies.
- IX. Partner with the donor relations and stewardship team to tell the story of and illustrate donor impact through production of the 2022 annual report and in tier 1 communication channels, including Checkpoints magazine, the Leading Edge newsletter, and video.
- X. Collaborate with alumni relations to develop the communications plan for the alumni portal rollout and its integration into the website launch.
- XI. Per the Tech Efficiencies Plan, onboard a new shared email marketing system (Emma) to increase cohesion and consistency in our communications (currently, the AOG and Foundation use separate e-mail systems). Ensure best practices are in place across all email marketing.
- XII. Collaborate with operations team on the communications aspects of Gone But Not Forgotten (GNBF) refresh, including the planning of a potential annual publication of obituaries that takes the place of Checkpoints printed obituaries. Target launch of new annual obituary publication is the summer of 2024.
- XIII. To enhance efforts to expand and diversify support from successive generations of donors, provide ongoing refreshed roadshow resources (talking points, slides, briefings, etc.) for board and senior staff travel as well as for in-person and virtual events.
- XIV. Use survey personas to craft audiences for communications and inform voice, tone, and calls-to-action across six decades of graduates.
- XV. Create staffing plan for podcast series and launch this new channel by the end of Quarter 1.
- XVI. Continue to implement processes and policies to ensure quality, accuracy, and efficiency in all of our communications.
- XVII. Create, staff, and use engagement data to continually refine social media plan, with an emphasis on engaging younger generations of graduates.
- XVIII. Review and, as necessary, update crisis communications plan in 2023.

Stewardship

As stewardship practices continue to be incorporated into the AOG and Foundation, it's imperative that everything we do (donor relations, gift administration and data integrity, and events) be centered around providing best in class care of all donors and donated funds. We must ensure permanency and efficiency in accordance with donor intent and build a spirit of philanthropy among alumni, parents, friends, and others to motivate engagement and encourage support of the Academy's mission. We remain committed to developing long-lasting and meaningful relationships with our graduate and donor communities that connects them back to the Academy and the impact of their gift. We must care for and protect philanthropic support – gifts and those who give them – in a way that both responds to the donor's expectations and respects the act of giving. Most importantly, we must continue to evolve our operational structure to achieve levels of outstanding and consistent success.

Donor Relations/Administration

Defining Goals:

- I. Employ Blackbaud's Stewardship Module for comprehensive stewardship reports during 2023.
- II. Collaborate with major gift colleagues in developing stewardship plans for top 25 donors.
- III. Fully launch stewardship matrix to clearly illustrate for team members and donors what donors can expect for level of giving and giving societies, by program and by project.
- IV. Full implementation of comprehensive stewardship reporting: endowment/impact reports; annual giving summaries/consolidated receipts; annual report; quarterly impact statements.

Actions:

- I. Deliver annual comprehensive stewardship reports (endowed fund/non-endowed funds combined) by April 1, to donors/interested parties of endowed/current restricted funds and corporate and foundation relations reports as required.
- II. Fully launch personalized stewardship plans for top 25 donors. These plans should be recorded in RE with actionable steps.
- III. By February 1, 2023, fully launch new comprehensive menu of society courtesies commensurate with giving (this includes quarterly impact reporting; branding Leading Edge newsletters).
- IV. By March 1, 2023, launch stewardship gift announcement strategy in tandem with marketing and communications strategy for major and principal donors (courtesies commensurate with giving: \$250K+; \$500K+; \$1M+; \$5M+).

- V. Continue to refine stewardship protocols with special emphasis on write-off and pledge management procedures and consolidated giving and tax year-end summaries (mailed by January 31st each year).

Gift Administration and Data Integrity

Defining Goals:

- I. Deliver timely receipting, accurate reporting, and effective and meaningful stewardship to all donors.
- II. Full integration of database departments between the AOG and Foundation.
- III. Execute initiatives to expand constituent data collection (and proactive plan for returned mail/email bounce backs) and opportunities for constituents to update their contact information and profiles. Strategic collection opportunities may include class reunions, engagement programs (affinity groups, graduate ambassadors, chapters, parent clubs, upcoming graduate portal, etc.), and activities with Board and CAS Liaisons.
- IV. Raise \$180,000 in matching gifts during FY 2023.

Actions:

- I. Process all charitable contributions within 3 business days of when they are received.
- II. Receipt all charitable contributions within 4 business days of when they are received (run check receipts three times a week for same day/next day delivery depending on timing of mail run).
- III. Prepare and deliver to donor relations all gift acknowledgements for charitable contributions over \$1,000 within 5 business days of when they are received.
- IV. Continue utilization of Anthology/Imodules for automated credit card expiration reminder emails: 3 weeks, 1 week, 1 day prior to charge, day of, and 1 week post date for all expired cards.
- V. Prepare and deliver all pledge reminders monthly in tandem with data analytics. Combine reminders for donors with more than one pledge with the same due date.
- VI. To integrate the database departments, hire gift administration and data integrity manager by January 15, 2023.
- VII. Continued implementation of Double the Donation – matching gifts program (raise \$180K in matching gifts in 2023).
- VIII. Research missing information through a variety of paid and free resources. Proactively collect and code critical data as determined by the data collection plan. Constituent biographical and communication preferences/solicitation codes are collected daily, weekly, monthly, and as received (full details outlined in stewardship data collection strategy doc).

- IX. In tandem with HR, provide basic RE overview onboarding for new AOG and Foundation staff. For current staff, launch Blackbaud University training program (fundamental course for all users, in-depth training for pro-level users).

Events:

Defining Goals:

- I. Execute all events and activities that promote and support the missions of the development and alumni relations/engagement programs of the AOG and Foundation. Events is here to support the diverse needs of the AOG and Foundation.
- II. Create and launch comprehensive event management procedures and policy with an eye on excellence in user/attendee/stakeholder experience.
- III. Execute successful event strategy for signature events, not limited to: Distinguished Graduate Award Dinner; Honorary Membership Recognition; Jabara Award Dinner; FamFest; NOK (Next of Kin); reunions and other graduate engagement events (tailgates/suite, etc.).
- IV. Launch new AOG and Foundation events website and Event Management Software with an eye on the total experience, not limited to registration/in-person experience and the post-event follow-up/thank-you in tandem with donor relations.

Actions:

- I. In tandem, and as driven by the mission of development, plan and execute events in top regional areas: Washington, DC, Southern California, New York City, Arizona, Dallas, Chicago, Boston, Colorado, Houston, San Francisco, Seattle, Austin/San Antonio, Florida, Minneapolis, and Atlanta. Events not limited to: Harmon dinners, home/away tailgates, dedication ceremonies/groundbreakings (OLC dedication; Stadium groundbreaking; Administration Building Groundbreaking).
- II. By February 1, 2023, establish best practices, processes, and policies for venue selection, contract negotiation, event collateral creation, event schematics, RFP review, budget development, mailing lists and invitations, facilities, catering, event programming, technology requirements, and confidential briefings.
- III. Provide strategic guidance and support to graduate programs and external engagement such as reunions, WebGuy, membership, young alumni, chapters, affinity groups, facilities (Doolittle), and technical/AV related event elements, including Cvent expertise and support for registration pages.
- IV. By March 1, 2023, provide comprehensive listing of events on new events website; launch web integrated payment portal and events internal/external web-based event request forms (Zoho Software Program).

Academy and Community Relations

The academy and community relations team has diverse responsibilities spanning capital projects, organizational integration and assessment, and preservation of our Academy's heritage. More broadly, every interaction of this team with internal and external stakeholders fosters improved relationships and understanding of the AOG and Foundation and our shared mission to support the Academy, serve graduates, and preserve our Heritage. At the core of our team's activities is a deep commitment to being excellent stewards of the generosity provided by our donors and relentless resolve to deliver exceptional products and results that exceed requirements and expectations consistently and promptly.

Defining Goals:

- I. Establish new and enhance existing relationships with the Academy and community stakeholders.
- II. Energize preservation activities focused on history and heritage to activate graduates and inspire Academy supporters by revising policies and practices and leveraging new technologies to increase awareness of contributions, achievements, and legacy of the Long Blue Line.
- III. Within history and heritage, develop and implement integration and assessment policies and practices to include schedule and reporting requirements.
- IV. Identify and pursue innovative and improved methods and technologies for design and construction to limit cost overruns and schedule delays.
- V. Strive to manage Academy capital projects with increased effectiveness and efficiency focused on these key project goals:
 - Complete Tuskegee Memorial at Davis Airfield NLT Summer 2023.
 - Complete Heritage Trail Development plan including design of challenge, recognition and memorial themes and completing construction of the Distinguished Graduate Monument NLT Summer 2023.
 - Secure satellite office space within Fairchild Hall NLT Fall 2025.
 - Coordinate and complete Stadium Groundbreaking event.
 - Contribute as a key participant in the ongoing construction of the Madera Cyber Innovation Center to ensure donor intent is met; provide timely updates to Foundation leadership and Board representatives concerning construction schedule, cost, and emergent issues.
 - Begin construction of new Administration Building on the Doolittle campus.

Actions:

- I. In collaboration with the CEO and President, identify and foster key relationship development opportunities at USAFA, with the local community, and regional and government leaders and organizations.
- II. Gain in-depth understanding of sister service academy practices and policies regarding relationship with respective Academy staff and community.
- III. Identify and foster strong relationships with other organizations/foundations supporting higher education.

- IV. Increase and enhance participation and crossflow of staff with community leaders and key organizations through attendance and participation in our organizational events and at community-led events.
- V. Work with marketing and communications to refine (and update as needed), the AOG/Foundation 101 presentation for community and other external stakeholders and parties.
- VI. In partnership with gift funds management, build and execute a communication plan for Academy personnel, to include A8D, to understand the funds available to them, and/or which funds are underutilized/dormant and why.
- VII. Conduct comprehensive review and revision of policies governing heritage and history. Draft policies for issues not currently addressed.
- VIII. Complete analysis of archive/catalog software; initiate training on current system or purchase and implementation of new software as required to complete data entry of archival materials and artifacts.
- IX. Complete information data input to introduce the virtual museum on our webpage.
- X. Complete archival activities for all artifacts currently on display and in storage.
- XI. Work with Doolittle Hall facilities staff on the update of the library, cataloging all items, creating sections for display, and storing current items that no longer serve its function within the library.
- XII. Work with Doolittle Hall facilities staff to update graduate ring display and create focal point in conjunction with ring display interactive screen. Work with alumni relations team to create program for 4-degree and 3-degree cadets to build excitement about rings.
- XIII. Work with alumni relations to identify and implement solution to deliver class web page/portal with capabilities to include electronic histories and other multimedia artifacts such as audio, video, photo, and e-documents.
- XIV. Work with heritage and traditions committee on all additional plaques for the Plaza of Heroes. Work with the projects team to develop any additions or updates on the Heritage Trail.
- XV. Conduct independent and unbiased review of functional area activities; provide findings/feedback to respective functional area leader. Follow-up to review implemented solutions and outcomes.
- XVI. Identify and implement improvements to project management including RFP development, solicitation, design and construction, contract management, financial management and turnover to the Air Force/Academy.
- XVII. In collaboration with key Academy staffs, develop and implement a comprehensive capital project template that outlines critical coordination, schedule, and turnover milestones, establishes routine communications with internal and external stakeholders and provides adequate planning time for key ceremonies surrounding projects (i.e., groundbreaking, naming, dedication).
- XVIII. Establish a battle rhythm to provide project updates to key staff members to ensure cross-functional integration through timely communication.

Operations

Operations serves as the infrastructure of the building and support of the three organizations that reside in Doolittle Hall as well as the extension in Building 8034. Within the umbrella are the following functions:

- Information Technology
- Facilities
- Merchandise
- Customer Service

It is essential to maintain and increase support as both the AOG and Foundation become more integrated, maintain connection with all constituents, and provide an inviting, professional, and service-oriented front to all graduates and visitors alike.

Information Technology

Defining Goals:

- I. Maintain and improve systems security by keeping informed and apace with security standards and technology trends.
- II. Support company efforts by providing high quality technical support, systems and tools, training, and customer service.
- III. Seek improved services and technology and apply where it is cost effective.

Actions:

- I. Based on 2022 IT Audit results, initiate and implement recommendations throughout 2023 based on timeline and identified priorities.
 - II. Replace Blackbaud Net Community functionality with other offerings to discontinue this service throughout 2023.
 - III. Implement Single Sign On system for use with most/all websites by end of Quarter 1.
 - IV. Implement new combined email marketing system, Emma, to include integrations by end of Quarter 1.
 - V. Implement new website tools to allow communications more flexibility with website content by end of Quarter 1.
 - VI. Update all Windows servers with latest version of Windows by the end of Quarter 2.
 - VII. Complete all website migration to the cloud by the end of Quarter 2.
 - VIII. Update all Arcana detailed reporting for accounting and membership, uploading to cloud between Quarters 2 and 3.
 - IX. Setup Shopify and migrate POS and ecommerce systems by the end of Quarter 4.
- 2023 Operating Plan

Facilities

Defining Goals:

- I. Maintain Doolittle Hall and its surrounding acreage and buildings as a premier location for graduates, families, and visitors in a professional and inviting way.
- II. Provide support, tools, and service to all departments to ensure all facets of the building are functional and efficient.
- III. Provide recommendations to leadership of additional needs and assessments for Doolittle Hall and surrounding areas.
- IV. Provide support and resources to staff residing in Building 8034 as needed.

Actions:

- I. Create building schedules and time frames for maintenance and general upkeep of grounds.
- II. Work within budgeted amounts to update the following areas by June 30th: assembly carpeting and dance floor, updated gift shop footprint, remodeled bathrooms along with infrastructure items such as fire system valves and control panel, pavilion air conditioner, and fencing along current heating/air system outside.
- III. As scheduled building updates are addressed, notify the President and/or SVP of Operations of any newly identified needs so proper timeline and budget determinations can be calculated.

Merchandise

Defining Goals:

- I. Reach the revenue goal of \$650,000 with a gross profit of \$374,591.
- II. Provide a variety of goods that appeal to various segments of shoppers: alumni, family, visitors, and the community.
- III. Provide offerings to chapters, affinity groups, and cadets to increase visibility.
- IV. Based on quarterly reports of purchasing choices of our constituents, see which expanded options resonate to better inform future selection of merchandise.

Actions:

- I. Meet our revenue goal by utilizing the following strategies: expand executive line of clothing with higher margins of profit, focus marketing of family items leading up to Inprocessing, partner with Prep School to expand offerings, partner with more royalty programs of drop ship direct from vendor options, reduce number of low profit tchotchke items, and create a better JIT inventory method.
- II. Continue to look at options for families, working in partnership with parent membership to instill value in family plan.

- III. Working with communications team, create a fiscal year marketing strategy to focus on relationship-oriented advertising in Quarter 1, incorporating messages for high traffic times such as Inprocessing, Parents Weekend, and Reunions.
- IV. Complete the boutique footprint downstairs with expanded timeframes for merchandise on atrium level.
- V. Work with IT to implement Shopify software to enhance ease and quality of online shopping experience.

Customer Service

Defining Goals:

- I. Create a first-class experience for all visitors upon entry into Doolittle Hall and when they call in.
- II. Support other departments to ensure communications are sent in a timely and professional manner.
- III. Support the graduate community through notifications of deceased classmates.

Actions:

- I. Create a standard operating procedures manual by end of Quarter 1 for consistency of transactions and communications throughout department.
- II. Implement monthly meetings between Constituent Relations Manager and department heads to ensure all events, services, and programmatic changes are channeled to customer service to ensure informed department representation to graduate community.
- III. Assist with larger mailings and other projects as time allows.
- IV. Continue to streamline Next of Kin (NOK) process from notification to letters to shipment of Checkpoints to reflect personalization and care of our deceased graduates. Expand relationship with mortuary affairs to ensure additional recommended services are provided. Plan is to hire and train Next of Kin (NOK) Coordinator to manage these processes by July 1st.

Finance and Administration

A primary function of the finance and accounting team is to accurately and timely record all financial transactions in the financial accounting software, and to generate timely and accurate reports for senior management and the Board of Directors, to facilitate the efficient financial management decision-making. A primary function of the human resources team is to ensure that the payroll system, performance appraisals, and employee benefit programs are being maintained, reviewed, and improved as needed to successfully accomplish the mission. A primary function of gift funds management is to provide meaningful, up-to-date, and timely information to USAFA and the team members to ensure that cash gifts and gifts-in-kind to the Academy and other Academy related organizations achieve the highest level of impact and outcomes for donors.

Defining Goals:

- I. Strive for continual process improvement in these specific areas: accounts payable, payroll processing, employee benefits, and employee performance appraisal.
- II. Produce impact reports (AOG) and individual fund reports (Foundation) and related financial information for more effective stewardship and management of gift funds in coordination with the stewardship department.
- III. Coordinate and improve financial functions between the AOG and Foundation, including consolidated reporting of activities.
- IV. Develop and prepare to launch single employer model on January 1, 2024.

Actions:

- I. Maintain financial records in accordance with generally accepted accounting principles (GAAP).
- II. Facilitate an independent audit of financial records resulting in an unqualified audit opinion.
- III. Complete the 2022 financial statement audit and file IRS Form 990 not later than the July 2023 meetings of the Board of Directors.
- IV. Coordinate the preparation, submission, and approval of 2024 operating budget by the October 2023 meetings of the Board of Directors.
- V. Prepare and deliver monthly financial reports to senior management team not later than 15th day of each month.
- VI. Assist senior leadership in managing their respective departments within the approved departmental budgets.
- VII. File state charitable solicitation registration statements in accordance with state laws and maintain compliance with such laws.
- VIII. Provide human resources support to the President, vice presidents, and all employees as needed and when requested.

- IX. Human resources to work with leadership to develop and plan professional development strategies for staff members to expand and improve skillset within a given position.
- X. Maintain compliance with all federal and state labor and employment laws and regulations.
- XI. Review and update employee handbook not later than June 30, 2023.
- XII. Redesign employee benefit programs as necessary or requested by July 31, 2023.
- XIII. Complete informal internal compensation review and recommend adjustments as needed by February 28, 2023.
- XIV. Select vendor and complete comprehensive salary compensation review including recommended adjustments by July 31, 2023.
- XV. Complete employment engagement survey by June 30, 2023.
- XVI. To prepare for launch of single employer model, develop plan for implementation to be completed by August 31, 2023. This plan will be presented to the AOG and Foundation Boards for approval during their fall meetings.
- XVII. The CEO, President, and the Chief Financial Officer will continue developing combined financial budgeting and reporting objectives and efficiencies.