Enhancing Excellence:
Advancement for a System of Higher Learning
Enhancing Excellence: Advancement for a System of Higher Learning
I am pleased to introduce Enhancing Excellence: Advancement for a System of Higher Learning, the new 2014-2018 strategic plan for University Advancement at the University of North Carolina.

The University of North Carolina and its advancement program are at a defining moment in time. In 2013, the UNC Board of Governors established Our Time, Our Future: the UNC Compact with North Carolina, a strategic plan that articulates the vision for the University’s 17 constituent campuses and charts our course to become the premier system of higher education in the nation. Enhancing Excellence specifically addresses Goal Five of Our Time: Our Future: ensuring an accessible and financially stable university by enhancing private fundraising.

University Advancement at the University of North Carolina exists to support bold leadership in higher education with actions that enhance student access; support quality academic performance; and create relevant partnering opportunities for our constituents. To identify and further define those actions, we undertook a transparent and inclusive process that energized and excited our team as it unfolded. Encouraged by visionary ideas and productive dialogue, the strategic planning process provided us the opportunity and charge to take a holistic view of our organization. The result: five strategic directions that will provide the framework for University Advancement to succeed as we address challenges and maximize opportunities available to the University.

Enhancing Excellence: Advancement for a System of Higher Learning is more than a roadmap for University Advancement’s success: it is a call to action that engages and supports the established goals of the University of North Carolina and ensures its preeminence in higher education. Focused on our strategic vision, empowered by University leaders and influenced by the students and citizens we serve, University Advancement is charging forward to transform the written words of this plan into exceptional action. As friends of this great University, we hope you share our enthusiasm for the exciting opportunities that await us. Please join us on this journey.

Sincerely,

Timothy A. Minor
Vice President for University Advancement
PHILANTHROPY AT THE University of North Carolina is as old as its charter: the 1789 bill that established the University included a solicitation of donors in exchange for naming opportunities. Since its founding and the opening of its first campus in Chapel Hill, the University has consolidated 17 independent campuses under its aegis, enrolling more than 220,000 students.

The policy-making body of the University is the Board of Governors, charged with the control, supervision, management and governance of the affairs of the constituent institutions. The Board of Governors elects the president who administers the affairs of the University and also selects a chancellor and board of trustees to lead each constituent campus. Advancement was largely constituent-based until 2002 when the University appointed the first director of advancement to coordinate efforts system-wide. Limited efficiencies resulted, and in August 2012, the Office of State Budget and Management and the University of North Carolina issued a report highlighting advancement weaknesses at a large number of UNC constituent institutions.

In response to that report, Our Time, Our Future recommended the development of a top-quality centralized advancement staff as well as the augmentation of constituent-based major gifts staff. These recommendations were incorporated into the University’s 2013-2014 budgets. Five centralized staff persons have been hired and are developing the strategy and operating plans to effectively and efficiently implement the University’s recommendations. Enhancing Excellence: Advancement for a System of Higher Learning is that plan. Companion to the University’s strategic plan, it is University Advancement’s guide to maximizing the resources available to the University over the next four years.

OUR TIME, OUR FUTURE gave us a clear directive: ensuring an accessible and financially stable University. Private fundraising achieves that directive amid uncertain state appropriations while honoring North Carolina’s constitutional mandate of low tuition and fees.
Our Vision

To be the national leader in higher education philanthropy through an integrated, collaborative, sustainable and transformative model for advancement support, services and professional development.

The University is recognized as a national leader in public higher education. We seek to establish an advancement organization of similar stature.

Our 17 constituent institutions are diverse in size, program offerings and focus, but the pursuit of excellence and continuing need for a high level of philanthropic support is common among them. To be most effective, we must build an advancement model that focuses the strengths of a well-developed University and constituent-based advancement organizations in a way that most fully supports their unique needs.

This integrated and collaborative approach to advancement support, services and professional development will result in a model that is sustainable and transformative in its level of support and its recognition for excellence in higher education philanthropy.

Our Mission

University Advancement maximizes philanthropic support of the University’s teaching, research and service missions through an integrated system of shared services and resources that expands opportunities for outreach and engagement and fosters strategic alliances.

The University’s constituent institutions are the source of numerous valuable and focused relationships. Each institution’s advancement organization is uniquely capable of identifying opportunities for new relationships and expanding existing ones. The growth of singularly focused relationships into a broader strategic alliance is a prime source of enhanced philanthropic support.

Through a system of shared services and resources, we seek to more effectively utilize existing strengths and expand the capacity of the advancement organization. We seek to make our people more effective, our processes more efficient and our services more relevant.

Our Values

To guide our interaction with each other and our constituents and to influence our decision-making in establishing policies, selecting people and carrying out our operations, University Advancement embraces these values as the core of our beliefs and the basis of our organizational culture:

COLLEGIALITY – Cooperation and collaboration are necessary for us to maximize results and create an environment in which individual growth and development are congruent with organizational goals. We embrace collegiality in all our interactions.

TRANSPARENCY – Knowledge of our intentions and our actions allows more meaningful interaction with others. We seek always to make our intentions clear and our actions and interactions apparent.

ACCOUNTABILITY – We are responsible for fiscal and certain other means and assets entrusted to us. We commit to the use of these resources in an efficient manner consistent with the intended purpose of the provider. Regular and accurate reporting on the use of our resources is a critical element of accountability.

HONESTY – Highly ethical behavior is a critical element of trusting and valued relationships. We consider honesty in all of our relationships as the foundation for ethical behavior.

EXCELLENCE – Our relationships and our products/services are a true reflection of our organization and each of us individually. We are committed to a high level of professionalism and to the delivery of the highest quality of service to each other and our constituents.

RESPONSIVENESS – We value the time, differences and needs of others. Our interactions will always be timely and shaped by the unique needs and characteristics of those we serve.

INNOVATION – Creativity and risk-managed operations are necessary for productivity and growth. We value and reward creativity and the assumption and management of risk.

Operating Principles

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THE FOLLOWING FIVE GOALS support the mission of University Advancement and address capacity, efficiency, communications, sustainability and the enhancement of educational philanthropy—all of which are essential to achieve our mission.

I. Enhance advancement human resource capacity across the University of North Carolina.
To provide this human capacity we must select highly qualified and capable advancement personnel across the landscape of the University of North Carolina and maintain their capabilities through organized continuing education. Our human resource systems must be tested over time to assure their efficiency and effectiveness.

II. Provide shared advancement services and resources to UNC constituent institutions.
Many of the services required for a comprehensive advancement operation are common across the University’s constituent institutions. While some constituent institutions possess the need and resources to provide these services, others do not; their size, diversity and capacity differ, resulting in widely varying fundraising results. For many of our constituent institutions, these results compare unfavorably to their peers. Shared services provide an opportunity to increase fundraising capacity system-wide.

III. Establish effective internal and external communications.
Our desire to provide high quality services is reliant on our ability to fully understand—and respond to—the changing advancement needs of UNC and its constituent institutions. Likewise, our constituents must understand and be informed about our resources, services and operational processes. If we are to operate optimally, internal and external communications must support an efficient resource allocation model that deploys resources in a manner that maximizes returns.

IV. Enhance philanthropic support of education in North Carolina and the nation.
We believe that the total value of educational philanthropy can be expanded through education of personnel and potential donors; by creating alliances across the education spectrum; and in partnership with related organizations.

V. Develop a sustainable operation model.
It is the intent of University Advancement to become a self-sustaining resource provider to the University of North Carolina. High-quality resources, programs and services will deliver value to constituent institutions, other organizations and individuals. Cost, value, volume and pricing must be appropriately aligned to develop a self-sustaining operation.
Strategies, Actions and Accountability Guidelines

Agile, adaptive and intended for use in the context of a changing environment, the following strategies and actions will be revised as appropriate to accomplish the mission and goals of our stakeholders, the 17 constituent institutions of the University of North Carolina.

Goal I: Enhance advancement human resource capacity across the University of North Carolina.

STRATEGY A: Develop a University Advancement staff consistent with current and future needs.

ACTIONS
• Incorporate values congruency into the interview and hiring process.
• Annually identify future staffing needs, sources of funding and a hiring schedule.
• Establish a centralized development consulting capacity that improves fundraising outcomes through a defined and customized scope of work for constituent institutions.

STRATEGY B: Develop services/programs to support staffing and recruitment for constituent institutions.

ACTIONS
• Execute memorandums of understanding for position grants and mentor hiring process for constituent institution-based advancement positions.
• Develop University-wide résumé repository.
• Develop internal executive search capacity.
• Develop models for succession planning.

STRATEGY C: Establish professional development programming to enhance the breadth and depth of advancement skills.

ACTIONS
• Establish a professional development series for annual, major and planned giving; corporate/foundation relations; and advancement services staff.
• Develop system-wide philanthropic education for administrative and academic partners.
• Identify system-wide mentoring opportunities in advancement.
• Establish UNC Advancement leadership development programs.

GOAL I ACCOUNTABILITY GUIDELINES
1. Hire centralized University Advancement staff.
2. Implement executive search capabilities across all constituencies to streamline hiring.
3. Maintain a résumé repository to increase talent pool and decrease hiring time.
4. Secure permanent constituent institution funding for 100 percent of temporarily funded major gifts staff.
5. Establish professional development programs for annual, major and planned giving, prospect development, alumni affairs and communications.
Goal II: Provide shared services and resources to promote performance improvement.

STRATEGY A: Identify and deliver efficiencies in shared services.

**Actions**
- Explore shared services opportunities in the following areas:
  - Prospect development
  - Annual giving
  - Gift planning
- Provide consulting services.

STRATEGY B: Strategically source essential services and resources across the University.

**Actions**
- Identify, evaluate and implement opportunities for University-wide service/product contracting as economically feasible.
- Provide consulting services to assist constituent University leadership in building strong fundraising programs for long-term sustainable philanthropic growth.

STRATEGY C: Set goals for benchmarking, performance metrics/management.

**Strategy D:** Establish and implement an analytics management system that provides holistic donor research solutions in support of fundraising activities and coordination.

**Goal II Accountability Guidelines**
1. Increase comprehensive advancement capacity at all UNC constituent institutions.
2. Establish annual stakeholder needs assessment mechanism.
3. Set standard policies, procedures and best practices to enhance advancement operations at UNC and constituent institutions.
4. Assess net revenue per each shared service to support additional UNC Advancement capacity.
5. Implement a constituent relationship management system for managing UNC’s interactions with current and future constituents.
6. Create and provide prospect research reports to constituent institutions participating in shared services.

Goal III: Establish an effective and comprehensive communications plan.

**Strategy A:** Develop, implement and maintain effective and efficient communications within the UNC system.

**Actions**
- Establish ongoing communications within UNC constituencies using electronic, written and interpersonal opportunities.
- Conduct quarterly Advancement Council meetings with the vice chancellors.
- Create professional user groups for annual giving, gift planning and prospect development.
- Create an advancement intranet as a communication tool.
- Establish routine fundraising meetings with executive leadership.

**Strategy B:** Establish a UNC University Advancement external communications plan.

**Actions**
- Develop and populate the University Advancement sector of the new UNC website.
- Provide leadership for the implementation and enhancement of unique gift planning websites system-wide.
- Align the look and feel of advancement websites with overall UNC communication strategy.

**Goal III Accountability Guidelines**
1. Develop and implement a communications plan.
2. Establish dedicated advancement communications capacity.
3. Design advancement website and maintain it monthly.
4. Schedule monthly updates within UNC Executive Officer and Cabinet meetings.
5. Provide updates to Board of Governors chair.
Goal IV: Enhance philanthropic support of education in North Carolina and the nation.

**STRATEGY A**: Create a self-sustaining program for educational philanthropy.

**ACTIONS**
- Create donor education programs.
- Create specialized advancement certificate programs.
- Produce innovative philanthropic research.
- Provide continuing education for advancement professionals.
- Provide continuing education for UNC system non-development staff and external advancement professionals.

**STRATEGY B**: Facilitate the University's engagement opportunities with powerful and influential individuals and organizations that share our philanthropic objectives.

**ACTIONS**
- Create alliances with North Carolina Community Colleges.
- Create alliances with North Carolina Private and Independent Colleges and Universities.
- Create alliances with the Department of Public Instruction.
- Establish a Presidential Advancement Advisory Council to assist the president with establishment and coordination of system-wide fundraising priorities.

**STRATEGY C**: Establish and manage a constituent relationship management (CRM) system at UNC in support of fundraising activities and coordination of strategic management.

**ACTIONS**
- Launch constituent relationship management plan.
- Review policy and procedure guides.
- Begin business process testing.
- Deploy the system.
- Train end users.
- Launch University Advancement system and take it live.

**STRATEGY D**: Facilitate engagement opportunities and strategic alliances with other public/private partners to expand philanthropic support of education.

**ACTIONS**
- Create alliances with major education-related foundations.
- Create alliances with major corporate partners.
- Direct fundraising efforts on behalf of presidential and Board of Governors priorities.

**GOAL IV ACCOUNTABILITY GUIDELINES**
1. Establish protocol for the development of external alliances.
2. Create a formal association between the advancement functions of University of North Carolina and North Carolina Community Colleges System.
3. Prepare University Advancement to lead formal professional development and training programs.
4. Encourage participation by chancellors, deans and other academic leaders in advancement educational opportunities.
5. Create successful fundraising for presidential and Board of Governors initiatives.

**GOAL V**: Establish a sustainable operations model.

**STRATEGY A**: Develop a shared services budget and identify investment resources.

**ACTIONS**
- Develop an annual cost allocation for shared services.
- Develop pricing models for each shared service and shared resources.
- Prepare annual shared services revenue projections.

**STRATEGY B**: Establish a top-quality, centralized staffing model.

**ACTIONS**
- Determine base-level staffing requirements by function.
- Annually project additional staff increases by function.
- Determine budget impact of additional staffing.

**GOAL V ACCOUNTABILITY GUIDELINES**
1. Reduce duplication and costs on campuses and improve efficiency and service through cost recovery with centralized approach.
2. Achieve 50 percent reduction in UNC funding for University Advancement in three years.
3. Achieve 100 percent self-sustaining shared services operations in four years.
The Measure of our Success

Strategic Plan Accountability Guidelines

1. Increase UNC system-wide private fundraising by 25 percent or more. (FY 18)
2. Increase UNC system-wide contributions to the endowment by more than 20 percent. (FY 18)
3. Sustain all constituent institutions in the top 50 percent of peers for fundraising metric. (FY 18)
4. Increase human resources sustainability through improved hiring and retention rates and professional development. (FY 18)

Strategic Plan Implementation

The Vice President for University Advancement is responsible for the implementation of this plan:
• Assign responsibility for the achievement of each strategy and action.
• Acquire and allocate the resources required for plan implementation.
• Establish a timeline for completion of action items.
• Monitor implementation.
• Establish a process for adjusting the plan.
• Report plan results.

In addition to quarterly UNC system strategic plan updates to the Board of Governors, the University Advancement strategic plan results will be reported annually. Reports will include progress toward accomplishments, significant adjustments to strategies, actions and timeline and an overall assessment of the plan’s effectiveness.
## Strategies in Action

The following tables illustrate a timeline for tracking University Advancement’s goal strategies and action items.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Year 1 Fiscal Year 2014-2015</th>
<th>Year 2 Fiscal Year 2015-2016</th>
<th>Year 3 Fiscal Year 2016-2017</th>
<th>Year 4 Fiscal Year 2017-2018</th>
<th>Cost</th>
<th>Responsible Person</th>
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<tbody>
<tr>
<td><strong>Goal I-1.</strong> Hire centralized University Advancement staff</td>
<td>October 2014</td>
<td></td>
<td>Normal Operating Budget/Cost Recovery</td>
<td>VP Advancement</td>
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<tr>
<td><strong>Goal I-2.</strong> Implement executive search capabilities across all constituencies</td>
<td>December 2015</td>
<td>Shared Services/Cost Recovery</td>
<td>VP for Advancement and VP for HR</td>
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<tr>
<td><strong>Goal I-3.</strong> Establish and maintain a résumé repository</td>
<td>October 2015</td>
<td>Shared Services/Cost Recovery</td>
<td>AVP Advancement/AVP IT</td>
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<tr>
<td><strong>Goal I-4.</strong> Secure permanent constituent institution funding for 100 percent of temporarily funded major gifts staff</td>
<td>June 2016</td>
<td>Normal Operating Budget</td>
<td>AVP Advancement/VC of UNC institutions</td>
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<tr>
<td><strong>Goal I-5.</strong> Establish professional development programs for annual, major and planned giving; prospect development; alumni affairs; and communications</td>
<td>June 2014 Phased implementation</td>
<td>June 2017 Fully implemented</td>
<td>Shared Services/Cost Recovery</td>
<td>VP Advancement/AVP Advancement/VP Communications</td>
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<tr>
<td><strong>Goal II-1.</strong> Increase comprehensive advancement capacity at all UNC constituent institutions</td>
<td>June 2017</td>
<td>Normal Operating Budget</td>
<td>VP Advancement/VC UNC Constituent Institutions</td>
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<tr>
<td><strong>Goal II-2.</strong> Establish annual stakeholder needs assessment mechanism</td>
<td>April 2015</td>
<td>Normal Operating Budget</td>
<td>AVP Advancement</td>
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<tr>
<td><strong>Goal II-3.</strong> Set standard policies, procedures and best practices to enhance advancement at UNC and constituent institutions</td>
<td>July 2015</td>
<td>Normal Operating Budget</td>
<td>Policies &amp; Procedures Committee</td>
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<td><strong>Goal II-4.</strong> Assess net revenue per shared service to support additional UNC Advancement capacity</td>
<td>June 2015 Dec 2015</td>
<td>Normal Operating Budget</td>
<td>VP Advancement/AVP Advancement/VP Communications</td>
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<tr>
<td><strong>Goal II-5.</strong> Implement a constituent relationship management system</td>
<td>October 2014</td>
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<td>$78,700 CRM Committee</td>
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<td>II-6. Create and provide prospect research reports to constituents participating in shared services</td>
<td>December 2014</td>
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<td>Shared Services/Cost Recovery</td>
<td>AVP Advancement/Prospect Development Manager</td>
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<tr>
<td>Goal III-4. Develop and implement a communications plan</td>
<td>December 2015</td>
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<td>Normal Operating Budget</td>
<td>VP Advancement/Strategic Communications Committee</td>
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<td>III-2. Establish dedicated advancement communications capacity</td>
<td>June 2016</td>
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<td>Normal Operating Budget</td>
<td>VP Advancement/VPCommunications</td>
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<td>III-3. Design advancement website and maintain it monthly</td>
<td>January 2015</td>
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<td>Normal Operating Budget</td>
<td>AVP Advancement/VPCommunications</td>
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<tr>
<td>III-4. Schedule monthly updates within UNC Executive Officer and Cabinet meetings</td>
<td>January 2015</td>
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<tr>
<td>IV-5. Provide updates to Board of Governors chair</td>
<td>September 2014</td>
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<td>Normal Operating Budget</td>
<td>VP Advancement</td>
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<td>Goal IV-1. Establish protocol for the development of external alliances</td>
<td>January 2015</td>
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<td>Normal Operating Budget</td>
<td>VP Advancement/AVP Advancement/Sr VP Academic Affairs</td>
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<td>IV-2. Create a formal association between advancement functions at UNC and North Carolina Community Colleges System</td>
<td>June 2016</td>
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<td>Normal Operating Budget</td>
<td>VP Advancement/Sr VP Academic Affairs/COO</td>
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<td>IV-3. Prepare UNC Advancement to lead formal professional development and training programs</td>
<td>August 2015</td>
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<td>Shared Services/Cost Recovery</td>
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<td>January 2016</td>
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<td>President/St. VP Academic Affairs/VP Advancement</td>
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<td>IV-5. Create successful fundraising for presidential and Board of Governors initiatives</td>
<td>June 2015</td>
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<td>Goal V-1. Reduce duplication and costs on campuses and improve efficiency and service through centralized cost recovery</td>
<td>June 2015</td>
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<td>Shared Services/Cost Recovery</td>
<td>VP Advancement/AVP Advancement/VP Finance/VC UNC Constituent Institutions</td>
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<td>V-2. Achieve 50 percent reduction in UNC funding for UNC Advancement in three years</td>
<td>June 2017</td>
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<tr>
<td>V-3. Achieve 100 percent self-sustaining shared services operations in four years</td>
<td>June 2018</td>
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Four months, five people, one goal:

To analyze, identify, evaluate and chart a new course for University Advancement. The result? Enhancing Excellence: Advancement for a System of Higher Learning, a transformational, synergistic plan supporting the people, programs and partnerships of the University of North Carolina’s 17 constituent campuses.

STRAIGHTIC PLANNING COMMITTEE

Chair
Timothy A. Minor
Vice President for University Advancement

Erin Schwie Langston
Assistant Vice President for University Advancement

Stephen R. Watt
Director of Gift Planning

Frances D. Wilson
Administrative Support Specialist

Strategic Plan Facilitator
Mark Kiel, Ph.D., CPA

Left to right: Erin Schwie Langston, Frances D. Wilson, Timothy A. Minor, Rachael Walker and Stephen R. Watt.