

Baruch College
Office of College Advancement (OCA)
FY 2014 Goals & Objectives

Respectfully submitted to:
Baruch College General Faculty
March 11, 2014

MISSION: The Office of College Advancement (OCA) is the fundraising and alumni relations arm of Baruch College. OCA supports the College's strategic vision by securing the short and long-term financial resources necessary for and supporting the needs of key internal and external constituencies.

Fundraising:

Baruch College is coming off an extraordinary year for fundraising. In fact, The Council for Advancement and Support of Education (CASE), honored Baruch College by naming us a 2013 awardee for superior overall fundraising for a comprehensive public college. It is a blind review of the fundraising numbers, and the impact those gifts have in light of the institution's overall budget and breadth of fundraising support. This year continues to look strong as well, with a number of 3 significant fundraising proposals on the table totaling over \$50 million.

Gifts and Campaign Highlights

The Capital Campaign The Baruch Means Business Campaign officially closed on June 30, 2013 raising \$157 million, exceeding the \$150 million goal. Several notable gifts helped to push the campaign over goal including; a seven-figure gift from Mildred Weissman to re-endow the Weissman School, a seven-figure gift from Baruch alum Willem Kooyker '71 to create Deanship in the Zicklin School of Business in addition to a faculty fund and \$2.5 million in private support from a group of Baruch alumni in Los Angeles to fund the 25th Street Plaza. The campaign concluded with a special "thank you" event to all major donors as well as the creation of a keepsake book "Celebrating Philanthropy." The College also unveiled a donor wall in the Library and Technology Building noting all of the Baruch's largest donors.

Since the close of the Campaign, several noteworthy gifts have been closed included a \$3 million gift from Baruch Professor, Paul Loomba to name and endow the Department of Marketing. Lawrence Zicklin '57, LHD (Hon.) '99 and Stan Ross '56, LLD (Hon.) '99 also pledged \$600,000 collectively to help support and bolster the CPA pass rates. In addition, Elias Schonberger '42 created a new scholarship (his third) with a gift of \$100,000. Finally, planned gifts continued to provide critical support to the College. We learned of a \$200,000 bequest from the late Henry Dachinger '48 that should be realized in this fiscal year as well as a \$500,000 trust provision from Joan Weinman, '57.

Moving forward, the Office of College Advancement will focus efforts on a series of min-campaigns which align with the vision of the new strategic plan including an emphasis on scholarship and faculty support.

Strategic Partnerships (Institutional Fundraising)

Raise at least \$1,000,000 in restricted gifts

1. Continue to maintain and nurture the relationship with the Starr Foundation, FWA and Santander Universities to secure continued support exceeding six figures annually
2. Enhance our relationship with the College's top 50 corporate partners (total giving, number of alumni, recruiting volume) and further engage faculty in the development process
3. Continue to secure opportunities to partner with corporations around alumni network development.
4. Steward our institutional partners and donors to maintain cash flow and broaden and deepen their involvement on campus

Annual Fund FY 2014 – OCA will secure between \$3.234 million in unrestricted cash. Unrestricted fundraising continues to track positively. We have currently raised \$2.47 million towards our goal as opposed to only \$1.28 million at this time last year. We will reach the remainder of our goal through the following actions and strategies:

1. Collect outstanding pledge payments due in FY 2014.
2. Manage the 2014 Bernard Baruch Dinner - \$775,000 – secured two fully committed honoree: Matthew Goldstein and Dr. Lewis Friedman.
3. Continue to build the “17 Lex Society” & “Class Act” – leadership giving programs. Unrestricted giving from 17 Lex members totals \$1,387,902 this year compared to \$726,710 at this time last year. There have been 4 Class Act gifts this year compared to 2 during the entire last fiscal year.
4. Expand annual fund programs (mail, telefund and email) - \$535,000
5. Partner with BCF Trustees in expanding their participation in solicitation.
6. Coordinate with Advisory Boards to secure unrestricted funds for the Schools as well as restricted gifts for budget offsets and establishing or expanding key programs.

Alumni Relations

1. In process of hiring new Director of Alumni Relations and Volunteer Engagement (position vacant since April 2013).
2. In October 2013 held largest reunion since establishment of the Office of Alumni Relations in 2005.
3. More than doubled the number of alumni engaged with us on major social media platforms (Facebook and Twitter).

4. Record attendance at Baruch Young Alumni Network (BYAN) events since September 2013.
5. Expanded Baruch in Brief, monthly email newsletter to all alumni to a monthly basis.

1. BCF Development

2. The BCF held a board retreat on November 20 led by Robert Kissane, President of CCS. Bob is well known to Baruch and CUNY and will focus on best practices and the roles and responsibilities of a fundraising board.
3. Continue to recruit trustees with an eye toward youth, diversity, industry coverage, and leadership gift capacity.
4. The establishment of a Board Development Committee has led a renewed effort to encourage and build board support.