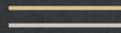


PURDUE FOR LIFE FOUNDATION

STRATEGIC PLAN



FY24-FY26

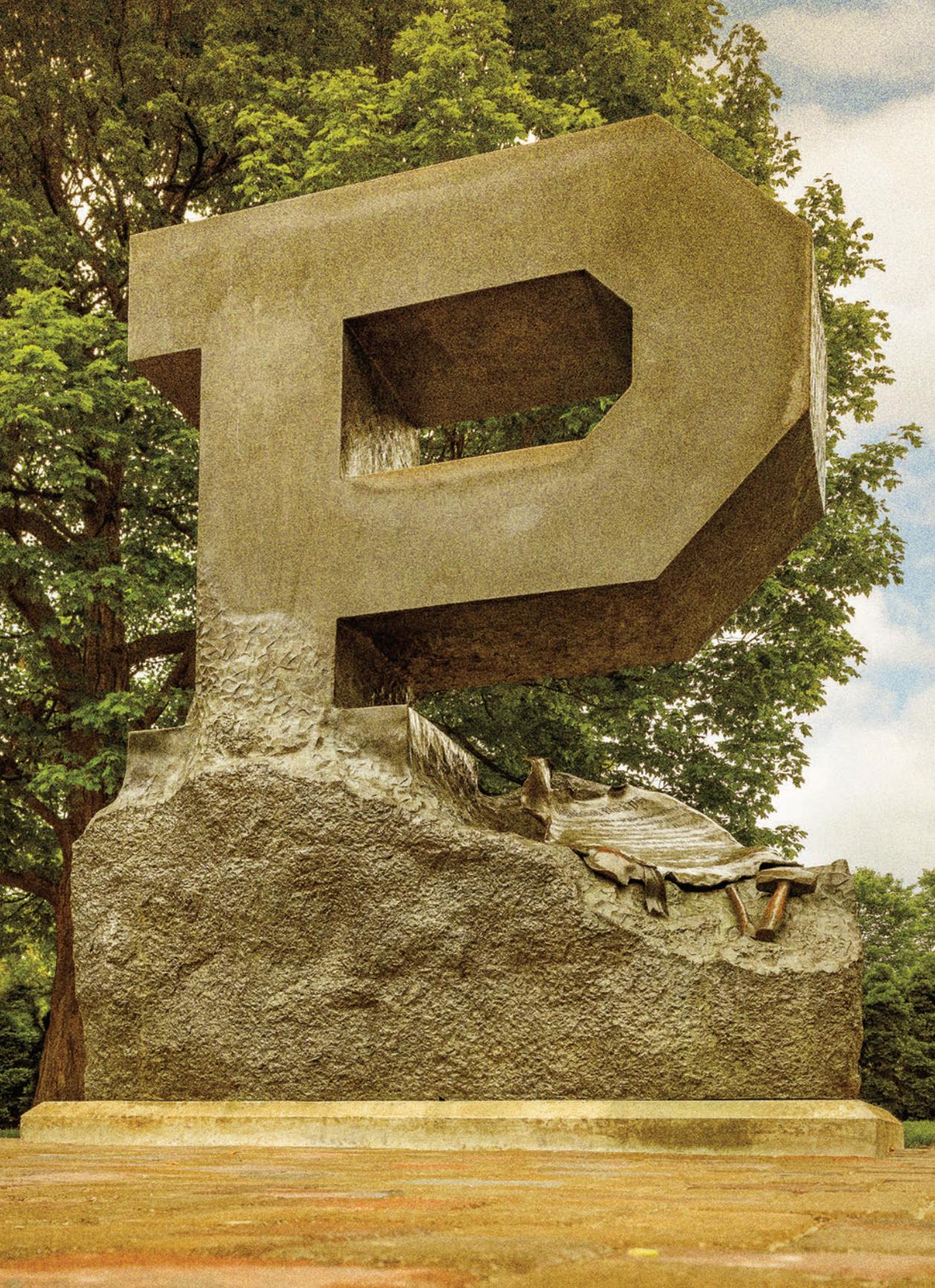


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ALIGN AND SUPPORT
UNIVERSITY PRIORITIES
AND NEXT GIANT LEAPS



**THE PURDUE FOR LIFE FOUNDATION—CREATED IN 2020 BY
UNITING THE PURDUE ALUMNI ASSOCIATION AND THE UNIVERSITY
DEVELOPMENT OFFICE—HELPS PEOPLE WHO LOVE PURDUE
UNIVERSITY STAY CONNECTED, GET INVOLVED, AND GIVE BACK.**





Artist, Julie Ro

ANCHOR #1

GROW ENGAGEMENT AND OUR PHILANTHROPIC PIPELINE

Provide opportunities for alumni, friends, and fans to get involved with Purdue and offer programming with a wide range of interests to help build engagement and affinity. We will engage constituents by connecting alumni to alumni, connecting alumni and friends to the university, and building the advancement pipeline with time, talent, and treasure to broaden our base of support by converting engagement into action through volunteering and giving.

KEY STRATEGIES

1. Engage alumni, friends, and fans through a variety of programs, events, and memberships to broaden our base of support.

PROGRAMS:

- // Alumni Clubs Program (*domestic engagement*)
- // International Networks (*international engagement*)
- // Alumni Travel Program (*both domestic and international engagement*)
- // Affinity Networks (*both domestic and international engagement*)
- // Volunteerism
- // Lifelong Learning
- // Student-Alumni Programs

MEMBERSHIPS:

- // Purdue Alumni Association
- // PASE (*Purdue Alumni Student Experience*)
- // John Purdue Club
- // Parents & Families Club
- // President's Council

2. **Build relationships with underrepresented and underserved supporters and increase awareness of engagement and advancement opportunities.** This will include creating pathways for underrepresented populations to engage with the Purdue community, engaging diverse audiences through affinity network programming, and building on our biannual DIB Advancement Forums to enhance collaborative environments for Purdue for Life and the broader Purdue community.
3. **Utilize our engagement score to measure individual and strategic population engagement in the four modes of philanthropy, communication, experiences, and volunteerism.** This will involve tracking improvements and identifying positive deviance to replicate and scale increasing scores (both individual and across strategic populations), aligning engagement programming to maximize conversion from engagement to giving.

- 4. Develop conversion processes to help alumni, friends, and fans move from engagement to serving as donors as capacity and affinity grow.** We will develop conversion communications to move both broad segments and individuals through the engagement and philanthropic pipeline, using engagement score data, prospect quality data, and targeted messaging. We want to create a common understanding and language both internally and across the Purdue ecosystem on how we build our pipeline and create opportunities for conversion. This will involve developing visualizations to chart the donor experience and where conversion points: nonmember/nondonor to member, annual member to life member, life member to annual donor, or annual donor to President's Council member. We will also develop a series of follow-up conversion communications to convert after event/program participation. This will include utilizing event, email, and appeal report card scores to show giving before and after events and defining variable content for each audience post event that will help move constituents into conversion using personalized communications through a multichannel approach.

KEY OBJECTIVES

FY24

- // We will increase philanthropic, experiential, volunteerism, and communication engagement scores beyond FY23.
- // We will increase the number of conversions from engagement to donor beyond FY23.
- // We will increase constituent-centered campaigns and communication strategies.
- // We will increase the number of members and leadership-level donors.
- // We will increase our donor count beyond FY23.

FY25

- // We will increase philanthropic, experiential, volunteerism, and communication engagement scores beyond FY24.
- // We will increase the number of conversions from engagement to donor beyond FY24.
- // We will increase constituent-centered campaigns and communication strategies.
- // We will increase the number of members and leadership-level donors.
- // We will increase our donor count beyond FY24.

FY26

- // We will increase philanthropic, experiential, volunteerism, and communication engagement scores beyond FY25.
- // We will increase the number of conversions from engagement to donor beyond FY25.
- // We will increase constituent-centered campaigns and communication strategies.
- // We will increase the number of members and leadership-level donors.
- // We will increase our donor count beyond FY25.

ANCHOR #2

INCREASE FINANCIAL SUPPORT TO ADVANCE PURDUE

The Office of Development will grow major and principal gift pipelines alongside attention to broader efforts aimed at long-term health of the fundraising enterprise including but not limited to close partnerships with the Broad-based Campaigns, Prospect Development, Donor Relations, President's Council, and Engagement teams. We will work to create trustful relationships across all frontline fundraising groups, including Donor Experience Officers, Special Operations, Regional Advancement, Office of Industry Partnerships, and Office of Foundation Relations.

KEY STRATEGIES

1. In close coordination with university leadership, we will solicit, accept, and steward gifts while leveraging institutional strengths and priorities.
2. Focus on sustainable growth through portfolio engagement and proposal pipeline development.
3. Continued emphasis on professional development through Develop U and the implementation of Plus Delta and third-party programs as evaluated and offered to staff.
4. Optimize at every chance as the foundation aims for a fully integrated advancement model.
5. Maximize PODS strategy for each unit and focus on the best practice strategy in Q1/Q2 FY24 led by CDOs.

KEY OBJECTIVES

FY24

- // We will implement a Top 3 Year strategy for each of the following fundraising metrics: net production or commitments, philanthropic cash, student support commitments, and donor count.
- // We will focus on normalizing key production drivers:
 - o Principal gifts: 25–33% of net production
 - o Planned giving: 25–30% of net production
 - o Office of Industry Partnerships: 5% of net production
 - o Office of Foundation Relations: 5% of net production
- // We will work on portfolio management and pipeline development by qualifying/disqualifying major gift prospects to continually refresh prospect pipelines, building planning-to-ask and ask targets for 1–3 years for every unit as well as yield rates to annual PTAs and asks, building a unit-based donor relations portfolio for 3–5-year prospects (principal giving portfolios), attaining and sustaining minimum thresholds of total pipeline (planned and solicited), and rolling out a \$50,000 major gift level.



FY25

- // We will maintain a Top 3 Year strategy for each of the following fundraising metrics: net production or commitments, philanthropic cash, student support commitments, and donor count.
- // We will normalize key production drivers, assess their impact, and adjust as needed:
 - Principal gifts: 28–33% of net production
 - Planned giving: 25–30% of net production
 - Office of Industry Partnerships: 5% of net production
 - Office of Foundation Relations: 5% of net production
- // We will continue to develop portfolio management and pipeline development by qualifying/disqualifying major gift prospects to continually refresh prospect pipelines, building planning-to-ask and ask targets for 1–3 years for every unit as well as yield rates to annual PTAs and asks, building a unit-based donor relations portfolio for 3–5-year prospects (principal giving portfolios), attaining and sustaining minimum thresholds of total pipeline (planned and solicited), and assessing the impact of the \$50,000 major gift level (benchmark peers; confirm or adjust level).

FY26

- // We will maintain a Top 3 Year strategy for each of the following fundraising metrics: net production or commitments, philanthropic cash, student support commitments, and donor count.
- // We will normalize key production drivers, assess their impact, and adjust as needed:
 - Principal gifts: 28–33% of net production
 - Planned giving: 25–30% of net production
 - Office of Industry Partnerships: 5% of net production
 - Office of Foundation Relations: 5% of net production
- // We will continue to develop portfolio management and pipeline development by qualifying/disqualifying major gift prospects to continually refresh prospect pipelines, building planning-to-ask and ask targets for 1–3 years for every unit as well as yield rates to annual PTAs and asks, building a unit-based donor relations portfolio for 3–5-year prospects (principal giving portfolios), attaining and sustaining minimum thresholds of total pipeline (planned and solicited), and assessing the impact of the \$50,000 major gift level (benchmark peers; confirm or adjust level).

ANCHOR #3

CULTIVATE OUR STORIES

In partnership with colleagues across the foundation, the Office of Marketing and Communications and Office of Special Events will identify and seize opportunities to raise awareness of the Purdue for Life Foundation brand, integrate underrepresented and underserved stories across our work, and refine our storytelling strategies.

KEY STRATEGIES

- 1. Raise awareness of the Purdue for Life Foundation brand through the creation and execution of an annual marketing campaign.** Each year's plan will focus on a key audience and include measurable metrics to help establish Purdue for Life as a household name for Boilermakers everywhere; demonstrate the importance and impact of staying connected, getting involved, and giving back; and reach and retain a larger audience of alumni, friends, and fans.
- 2. Identify opportunities to integrate underrepresented and underserved stories across our work.** This will include integrating stories in the following communication channels: Purdue for Life website, social media, Boiler UPdate e-newsletter, *Purdue Alumnus* digital magazine, lifelong learning and travel digests, *PulsePoint* newsletter (President's Council), planned giving financial guides, and President's Council and John Purdue Club emails. As additional opportunities emerge, we will also highlight underrepresented and underserved Boilermakers through special event invitations, programs, photography and videography, solicitations and stewardship pieces, and unit-based communications. We will track and record our progress.
- 3. Refine our storytelling strategies by identifying at least five new measurable approaches to implement.** These will include SEO and PPC digital advertising, postcards with QR codes, priority pages, and faculty support stories. To support this work, we will review and enhance our forward-facing communication platforms to ensure seamless interactions for audiences.

KEY OBJECTIVES

FY24

- // We will identify a key audience each fiscal year. Our key audience focus for FY24 will be Purdue University, Purdue Research Foundation, and Purdue for Life Foundation leadership, faculty, and staff. We will develop and distribute an elevator pitch for all Purdue for Life staff, take a leadership role with the campuswide forums for campus colleagues, advertise at major campus events frequented by our target audience (including the Homecoming football game and PMO and Purdue Convocations productions), distribute a print piece through campus mail with a QR code to measure success, and partner regularly with Purdue Today to distribute our content and raise awareness of Purdue for Life.

FY24 *(continued)*

- // We will distribute our “What is Purdue for Life?” video far and wide, showing it at Purdue for Life events, club/network gatherings, athletic events, and college/school advisory/volunteer board meetings. We will also distribute the video through Boiler UPdate, Purdue Today, and via paid promotions on social media, including YouTube.
- // We will pull in Purdue for Life branding at all Purdue for Life–related events, even when other branding—such as President’s Council, John Purdue Club, and Purdue Alumni Association—will also be featured.
- // We will utilize targeted postcard mailings with QR codes to boost the distribution of impact stories and measure the success of our efforts.
- // We will develop additional paid advertising, including digital advertising with SEO, PPC, and social media, including YouTube.
- // We will develop priority pages to highlight funding needs of units, show the impact of giving, and tell stories about why gifts matter.
- // We will develop donor impact stories, including scholarship and faculty support stories.
- // Our key platform focus for FY24 will be the web. We will focus on ensuring our “exit ramps” at the end of the marketing funnel are functioning properly. Specifically, we’ll focus on event-registration platform Blackthorn and a design overhaul of purdueforlife.org, with an emphasis on the mobile experience. As a part of this work, we will be reviewing the redesigned purdue.edu and websites of competitors and aspirational peers.
- // We will redesign our giving page, rebrand Purdue Connect into the Purdue for Life portal, and integrate Purdue Ties into the portal—all in partnership with IT and BBC colleagues.

FY25

- // We will identify a key audience each fiscal year. Our key audience focus for FY25 will be alumni. Specific activities to target this audience will be developed prior to FY25.
- // We will identify a key platform to focus on each fiscal year. Our key platform focus for FY25 will be email. Specific objectives to enhance this platform will be developed prior to FY25.
- // We will identify additional metrics to be added based on a review of what strategies from FY24 yielded the best results and what new priorities have emerged.

FY26

- // We will identify a key audience each fiscal year. Our key audience focus for FY26 will be donors. Specific activities to target this audience will be developed prior to FY26.
- // We will identify a key platform to focus on each fiscal year. Our key platform focus for FY26 will be social media and digital advertising. Specific objectives to enhance these platforms will be developed prior to FY26.
- // We will identify additional metrics to be added based on a review of what strategies from FY25 yielded the best results and what new priorities have emerged.

ANCHOR #4

BOOST OPERATIONAL EXCELLENCE THROUGH CORE VALUES

Sustainable operations will enhance Purdue's vision to become a national model for excellence and be seen as a workplace of choice with an established track record of recruiting, onboarding, growing and retaining top talent, strong operations, efficient and effective processes, sustainable allocation of resources, best-in-class technology solutions, and inclusive excellence.

KEY STRATEGIES

1. Create a biannual forum with campus partners and Purdue for Life staff (program leaders) to align vision, share goals, and establish ways to work together.
2. Reimagine all staff interactions and meetings to encourage conversation, collaboration, and community.
3. Establish a work group that brings together the Purdue Alumni Association, President's Council, John Purdue Club, and DIB efforts on special projects.
4. Develop a process to share financial positions at various managerial levels and increase awareness of the budget approval process and its impact within the hiring process.
5. Enhance stewardship of endowed funds, working with Purdue and Purdue Research Foundation partners to ensure donor funds are spent first.
6. Establish a work group in partnership with Purdue for Life Human Resources to drive and support efforts around recruitment and onboarding.
7. Invest in technology and use Purdue for Life as an exemplar for the larger partnership with Purdue systems/data.
8. Update and create a regular review process for policies and procedures and incorporate them into regular training and communication.
9. Create a culture of growth, development, and employee engagement to attract, develop, grow, and retain top talent.

KEY OBJECTIVES

FY24

- // We will incorporate Purdue for Life values and vision in the hiring and onboarding processes, clearly articulating this in all communication and interaction with candidates and employees.
- // We will bring together a group of campus partners and Purdue for Life leaders to collaborate and create a biannual forum experience.

FY24 *(continued)*

- // We will create opportunities for more interaction with senior leadership outside of forum.
- // We will reemphasize PROPS at the start of each fiscal year and consider how we incentivize and recognize participation.
- // We will establish cross-departmental work groups to lead key initiatives and establish shared goals within our strategic plan and annual goals.
- // We will establish three to five organization-wide awards or recognitions annually and present in conjunction with all staff functions, such as forum or networking events.
- // We will explore ways to incorporate fully remote employees into all aspects of team interactions.
- // We will launch and grow our Learning Management System (LMS) to maximize user adoption of systems, processes, and self-service capabilities.
- // We will work with the Purdue Research Foundation and Purdue University treasury to establish shared protocols for ensuring donor funds are spent and aligned with donor intent.
- // We will continue to be a technology thought leader and early adopter in the higher education advancement space.
- // We will refine technology that touches externally facing constituents (constituent portal, online giving page, Purdue Ties, texting) and incorporate it into the Purdue for Life IT/CRM road map.
- // We will implement the CRM and overall systems change management process to increase system reliability and reduce issues.
- // We will update and create a regular review process for policies and procedures and incorporate it into regular training and communication.
- // We will focus on two to three questions from the Gallup Q12 employee engagement survey annually as an organization.
- // We will build out training and development opportunities with Q3, Q4, and Q7 for 2023–2024 and annually select questions to focus on based on results of the annual survey.
- // We will update our performance management process and implement a performance management tool.

FY25

- // We will evaluate and plan collaborative forum events in November and May each year.
- // Senior leadership will host informal sessions on a bimonthly or quarterly basis to elicit ideas and feedback from cross-departmental groups within Purdue for Life.
- // We will reemphasize PROPS at the start of each fiscal year and consider how we incentivize and recognize participation.
- // We will feature departments and/or senior leadership teams at forum, department staff meetings, and/or as part of cross-functional project teams.
- // We will develop processes and training for hiring managers to support the recruiting process.



FY25 *(continued)*

- // We will supplement and/or mature the CRM governance committee to ideate future CRM projects and innovations as an input to the Purdue for Life IT/CRM road map.
- // We will continue to be a technology thought leader and early adopter in the higher education advancement space (FY25 road map to be determined).
- // We will develop quarterly programming for managers focused on developing and coaching strong teams and create peer and/or small group cohorts to provide support and mentoring to managers with five or more employees.

FY26

- // We will explore internships as a path to hire.
- // We will create a toolkit to help supervisors get started with (or restart) regular recognition and/or acknowledgment of good work.
- // We will work in conjunction with Purdue for Life Human Resources to develop tools and training to explore career pathways within Purdue for Life.
- // We will work toward a model for prioritizing the budget for organizational excellence and maximum/optimal impact.
- // We will continue to be a technology thought leader and early adopter in the higher education advancement space (FY26 road map to be determined).

ANCHOR #5

ALIGN AND SUPPORT UNIVERSITY PRIORITIES AND NEXT GIANT LEAPS

Partnership exists between academic leadership, treasury, and the Purdue for Life Foundation to identify feasible funding priorities and execute fundraising plans for presidential, board, unit, and interdisciplinary priorities and transformational giving initiatives. Clear cases for support and white papers are developed that articulate donor impact on advancing Purdue's overall mission.

Feasibility is reviewed with top prospects for each emerging priority to secure stakeholder buy-in and to determine fundraising strategies and achievable financial targets. Outlook for sustainability is analyzed to determine if donor-funded projects will be sustainable after a fundraising effort or campaign is completed and to determine whether adequate resources/bandwidth exist to address the fundraising needs of the university's top priorities.

Unit goals are aligned with related university strategic goals and fundraising targets. Institutional stewardship of donor funds is well-executed and appropriate impact reporting is implemented. Best practices for comprehensive campaign feasibility, marketing, and readiness will be put in place through processes created for presidential, emerging, and unit initiatives.

KEY STRATEGIES

1. Define thematic giving pillars to align fundraising priorities (e.g., people, places, possibilities), including presidential, unit, interdisciplinary, and transformational donor-driven initiatives.
2. Create working groups (intake body for ideas that flow in from campus and up through our designated team based on priority) to create and sustain a consistent process to evaluate project feasibility and design a fundraising plan.
3. Incorporate emerging priorities into communication, messaging, and annual/multiyear plans.

KEY OBJECTIVES

FY24

- // We will develop thematic giving pillars for fundraising opportunities focused on philanthropic impact and ensure each existing strategic initiative has a case for support or white paper.
 - We will identify all current university, unit, and transformational donor priorities and their university champions.
 - We will determine alignment by assessing all current university and \$20M+ unit priorities to determine affinities, overlaps, and connections.



FY24 *(continued)*

- We will ensure all potential transformational prospects are assigned to teams with a corresponding AVP and leadership.
 - We will define a potential transformational gift prospect base and build out teams led by AVPs and other fundraisers based upon donor interests to create redundancies.
 - We will create fundraising messaging that promotes a unified message around thematic pillars and the impact of university priorities.
 - We will ensure the website is up to date with the theme and current giving priorities.
 - We will add new opportunities as they arise.
- // We will identify working group members and outline a clear process for new opportunity assessment. The working group will define and identify resources needed to support strategic initiatives.
- We will partner with governing boards, treasurer, provost, and other academic leaders, as well as transformational gift prospects, to identify projects that support units and interdisciplinary efforts.
 - We will develop a process (like the BOT preapproval process for capital projects) to study proposed project feasibility with a university champion and other partners, focusing on desired outcomes (academic) using a top-down approach for donor readiness/support.
 - We will assess alignment and bandwidth with fundraising staff and academic partners and identify/assess/negotiate sources of funds and human capital needs (existing, new, reallocation).

FY24 *(continued)*

- We will develop a readiness checklist that certifies feasibility and ties back unit goal setting to individual initiatives annually. Ensure unit heads and university administrators (including treasury/facilities) receive briefings and sign off on related projects. The checklist will define whether the project is stand-alone (e.g., Daniels School of Business, Purdue Computes) or should align with existing thematic pillars (e.g., hypersonics).
- // We will create and sustain a consistent process to identify emerging priorities, evaluate their feasibility, and execute fundraising plans (pre-campaign, feasibility, leadership phase, public phase, stewardship), maintaining best practices to ensure readiness for future university comprehensive campaigns.
 - We will ensure consistent reporting in AVP meetings to identify opportunities.
 - We will add recurring agenda items to monthly AVP meetings to identify emerging priorities, utilizing regular meeting cadence with the provost, treasury, facilities, deans, and unit heads.
- // We will ensure fundraising responsibilities are outlined and a process is developed; projects have a clear plan and responsibilities are outlined for reaching goals from a top-down approach; and project goals and unit goals are informed by one another.
 - Working group will define a plan for execution and identify resources needed to support it.
 - Fundraising execution process will be executed for existing and emerging priorities, incorporating projections and progress to goals.

FY25

- // We will incorporate emerging priorities into communication, messaging, and annual/multiyear plans. Every major priority has a corresponding communication plan. We will develop communication plans that complement solicitation materials to warm audiences to optimize results adequately.
- // We will set a goal and timeline for each initiative for grassroots giving and sustain projects with follow-on initiatives and annual giving appeals.
- // We will add new opportunities as they arise.
 - Incorporate into thematic pillars or create new if appropriate.
 - Engage repeatable process created in FY24.

FY26

- // We will add new opportunities as they arise.
 - Incorporate into thematic pillars or create new if appropriate.
 - Engage repeatable process created in FY24 and extended in FY25.



