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**STRATEGIC PLAN: 2009-2013**  
***(REVIEWED and REVISED March and June 2009)***

**MISSION**

To ensure The University of Montana's excellence, access and affordability through a public/private funding partnership.

**VISION**

Become a leader and role model among like-sized university foundations, and continue as a partner in success with The University of Montana.

**CHALLENGES**

1. Global competition demands that American higher education resume its place on the forefront of learning, research and discovery. Without private support this will not happen.
2. Competition for each philanthropic dollar is intense.
3. Continuing the University's excellence, access and affordability will require increased reliance on private funding as state resources continue to decline in relative importance and tuition affordability limits are reached.
4. Foundation communications need to underscore the central importance of philanthropy in higher education, and to be well integrated with the University.
5. The University's constituencies have shared responsibility for building a sustainable resource base that includes private support as a key component.

The following two Challenges were added in March 2009:

6. The economic downturn and continuing uncertainty of the global economy require that the Foundation recalibrate its fundraising and investment benchmarks in recognition of external forces and the real loss of wealth and assets by our constituents.

7. It is critical that we hold the course on our development program so that we stay in touch with our donors and friends and continue to communicate the current and future needs of the University. By doing this, the Foundation will be well positioned to continue an upward trajectory in giving when the economy significantly improves.

## **STRATEGIC AGENDA**

- Create a culture of philanthropy at The University of Montana
- Become a \$40 million per year fundraising organization by the end of FY 2013
- Ensure that Foundation operations are as efficient and transparent as possible
- Improve sustainability of the UM Foundation's support to the University

## **KEY GOALS**

### **1. FUNDRAISING**

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Develop and expand relationships with current and potential supporters of the University in order to secure private funding in support of the University's mission.

### **2. MARKETING AND COMMUNICATIONS**

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Build awareness of the importance of private support through integrated communications, constituent relations, outreach, events and effective message development.

### **3. INVESTMENTS**

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Invest operating as well as long term funds in a manner that produces returns sufficient to fund and grow donor funded programs without taking unnecessary or imprudent investment risks.

### **4. WORK ENVIRONMENT**

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Maintain a workplace that attracts and retains employees of the highest caliber.

### **5. OPERATIONS**

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Conduct the operations of the Foundation in a manner that is prudent, efficient, transparent and progressive.