



2022-2025  
STRATEGIC PLAN

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## Introduction and Overview

### Introduction

Since the development of its last strategic plan, the SUNY Orange Foundation has grown and changed. A new Executive Director joined the organization in 2018. In 2020, the COVID pandemic changed the way the Foundation interacted with the College, with donors and with each other. Virtual events and meetings became the norm and the organization pivoted to respond to the new work environment.

The focus areas of the 2018-2021 Strategic Plan included Fundraising, Alumni Engagement, Expanded Communication Strategies, Increased Human Resource Capacity and Maximized Operational Efficiency & Effectiveness. Over the past three years, the Foundation increased sponsorship income for all events, maximized Hudson Valley Gives as a fundraising tool, and increased scholarship awards to over \$430,000. It redesigned the Alumni Engagement Committee, conducted multiple alumni surveys, identified new ways for alumni to reconnect with the College and its students and increased alumni giving. The organization has expanded its communications strategies to include a bi-monthly e-newsletter, scholarship spotlights, student testimonials, increased social media presence and a more user-friendly website. Our work in Human Resources resulted in the development of a Human Resource Committee, the creation of a comprehensive employee handbook, and the hiring of a new Finance Manager. The Foundation maximized operational efficiencies by developing a Raisers Edge best practices guide, moving all financial reporting to QuickBooks and making use of Raisers Edge features such as monthly billing, batch processing, data analysis, online donations and event registration and more customized reporting.

We accomplished a great deal over the last three years, but the needs of the College and the community continue to change and we must continue to adapt. This new strategic plan builds on the work that has already been done and paves the way for an even brighter future. I look forward to working with the SUNY Orange Foundation Board of Directors, College Administration, our alumni and donors on this new strategic plan as we continue to help empower the dreams of SUNY Orange and its students.



Executive Director Ansbro  
Executive Director  
SUNY Orange Foundation

## Overview of the Planning Process

In early 2021, the SUNY Orange Foundation launched a strategic planning process to build on the previous strategic plan and take stock of the impact that the COVID-19 pandemic had on the Foundation's work as well as that of Orange County Community College and the faculty, students, and alumni. The organization hired the New York Council of Non-Profits to facilitate the planning process and assist in the development of the plan document.

The Foundation has a long history of successful strategic planning. The previous plan for 2018-2021 was the first one launched by the Foundation as an independent organization and was largely focused on building the organization's capacity, developing its brand, solidifying its fundraising strategies, and strengthening relationships with alumni and donors. The 2022-2025 Strategic Plan builds on that plan's achievements and positions the Foundation to play an even more significant role as a partner to the College and to students' success.

The strategic planning process was led by a Strategic Planning Steering Committee comprised of Foundation Board Members, Foundation Staff and members of the College Administration. The process also took into account information obtained through an online survey of alumni, as well as a survey of the Foundation's staff and Board of Directors and a survey of Cabinet Members from SUNY Orange/Orange County Community College.

The Strategic Planning Steering Committee met four times between late March and mid-August, first to plan the planning process and then for three planning sessions. The Steering Committee worked to prepare a draft plan which was shared with the full board of directors at a planning session in October, 2021. This draft incorporates those recommendations and was discussed and approved by the SUNY Orange Foundation Board of Directors on November 22, 2021.

## Our Foundation: Mission, Values, and Vision

### Mission

#### Revised Mission Statement

*The mission of the SUNY Orange Foundation & Alumni Engagement is to raise and distribute funds, build a strong alumni network, and foster lasting ties to our community in order to expand opportunities and support the success of SUNY Orange students.*

### Values

#### Our Valued Roles

- ✓ Trusted fiduciaries
- ✓ Passionate advocates
- ✓ Committed partners

#### Vision and Strategic Positioning Statement

*The SUNY Orange Foundation will be a valued strategic partner to SUNY Orange and its students and alumni by building a thriving culture of philanthropy that supports student learning and the College as an accessible educational resource.*

## SWOT Analysis

<b>Internal Strengths</b>	<b>Internal Weaknesses</b>
<ul style="list-style-type: none"> <li>• Financial stability</li> <li>• Board of directors' experience and knowledge</li> <li>• Great reputation</li> <li>• Passion of the Executive Director and the Board of the Directors</li> <li>• Notoriety of the college within the community and the educational value of the programming</li> <li>• Large donor base and focus on alumni</li> <li>• Solid Scholarship Program</li> </ul>	<ul style="list-style-type: none"> <li>• Staff turnover/small staff</li> <li>• Technology is not as integrated or efficient as it could be</li> <li>• Branding and awareness of the Foundation and its role is not as clear as it needs to be</li> <li>• Lack of availability and/or use of data for planning and goal setting</li> <li>• Board Diversity</li> <li>• Need for younger voices on the board</li> <li>• Lack of consistent presence on campus</li> </ul>
<b>External Opportunities</b>	<b>External Threats</b>
<ul style="list-style-type: none"> <li>• New donor cultivation</li> <li>• Strengthen relationships with students, alumni, and area schools and businesses</li> <li>• Targeted fundraising for scholarships focused on specific programming (e.g. nursing, culinary, etc.)</li> <li>• Improve relationships with minority community to ensure diversity, equity and inclusion</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing impact of pandemic</li> <li>• Competition with other schools and nonprofits for fundraising</li> <li>• Declining enrollment at SUNY Orange/OCCC</li> <li>• Inability to diversify donor base</li> </ul>

## Overview of Strategic Issues, Goals, and Strategies

- I. Resource Development.** Increase fundraising to support college initiatives and expand *scholarships and other assistance to keep SUNY Orange education attainable for current and future students.*

### Strategies

1. Enhance donor cultivation and stewardship.
2. Continue to increase event revenue.
3. Strengthen our working partnership with the College.
4. Foster working relationships with Corporate Partners for fundraising and workforce development.
5. Measure outcomes.

- II. Student and Alumni Relations.** *SUNY Orange Foundation will deepen relationships with students and alumni and work to strengthen their lifelong connection to SUNY Orange and the Foundation.*

### Strategies

1. Strengthen relationship of Foundation with students while at OCCC.
2. Identify ways alumni can remain connected and support and mentor students beyond financial contributions.
3. Increase alumni connections and giving.
4. Measure outcomes.

- III. Communications and Public Relations.** *Bring awareness of the full resources provided through OCCC and the Foundation to all stakeholders.*

### Strategies

1. Develop a comprehensive communication plan targeted towards a range of audiences.
2. Promote OCCC as an important and affordable foundation and path to future educational and career experiences for fund-raising purposes.
3. Develop county-wide PR campaign to raise awareness of SUNY Orange Foundation as a philanthropic opportunity.
4. Measure outcomes.

- IV. Human Resources & Organizational Capacity.** *Develop the board and staff resources and organizational capacity to accomplish short and long-term goals.*

### Strategies

1. Re-evaluate and clarify administrative fees to better support and sustain the organization.
2. Better utilize data for organizational planning and decision-making.
3. Support, sustain, and develop staff capacity.
4. Enhance board support and engagement.
5. Enhance Diversity, Equity and Inclusion Efforts.

## Implementation Plan

<b>Strategic Issue 1: Resource Development</b>						
<i>Goal: Increase fundraising to support college initiatives and expand scholarships and other assistance to keep SUNY Orange education attainable for current and future students.</i>						
Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
<b>1. Enhance donor cultivation and stewardship.</b>	1.1 Create a definitive first time donor action plan.	Executive Director		X		
	1.2 Develop a comprehensive plan and strategy for increasing legacy gifts.	Executive Director		X		
	1.3 Create “clubs” or “levels” to recognize donors for giving time and amounts.	Executive Director			X	
	1.4 Increase donor communication to ensure they have a clear understanding of the impact of funding.	Executive Director		X		
	1.5 Use FB to acknowledge and recognize donors for smaller donations.	Executive Director, Alumni	Marketing		X	
	1.6 Clearly articulate the donor stewardship strategies needed to engage event participants in more ongoing and meaningful ways.	Executive Director		X	X	X
	1.7 Work with the College to identify companies who have students as interns in order to convert them into sponsors/scholarship supporters.	Executive Director, Alumni		X		
	1.8 Develop a campaign that enables alumni to donate in the name of a faculty member or administrator that made a positive impact in their journey-or to give alumni an opportunity to donate based on their experience at OCCC.	Executive Director, Alumni	Alumni			X
	1.9 Explore new and innovative fundraising or friend-raising events to engage diverse stakeholders.	Executive Director				X
<b>2. Continue to increase event revenue.</b>	2.1 Develop a manual for each major fundraising event that can be used for succession planning and leadership development.	Executive Director and Alumni	Leadership	X		

### Strategic Issue 1: Resource Development

*Goal: Increase fundraising to support college initiatives and expand scholarships and other assistance to keep SUNY Orange education attainable for current and future students.*

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
	2.2 Better understand how corporate donors wish to be recognized and incorporate these into marketing initiatives.	Executive Director	Marketing	X		
	2.3 Connect event messaging to student and college needs.	Executive Director	Marketing	X		
<b>3. Strengthen our working partnership with the College.</b>	3.1 Strategize with the College Administration and Departments about how to engage corporate donors to better understand and support their workforce development needs.	Executive Director	College Pres.		X	
	3.2 Increase opportunities for Foundation board and College board interaction.	Executive Director	College Pres.	X		
	3.3 Educate college administration about fundraising opportunities and strategies to expand our reach.	Executive Director	Major Gifts Committee		X	
	3.4 Create a College wish list with prices to expand opportunities for targeted giving.	Executive Director	College Pres.			X
	3.5 Enhance the payroll deduction program and recognize faculty and staff donors in Grapevine.	Executive Director	SUNY Orange HR Dept.	X		
<b>4. Foster working relationships with Corporate Partners for fundraising and workforce development.</b>	4.1 Develop funding relationships with Corporate Partners to strengthen and promote the College as a workforce development partner.	Executive Director			X	
	4.2 Develop marketing initiative to share stories about the relationship between the College and the Corporate community and how they support each other.	Executive Director	Marketing		X	
<b>5. Measure Outcomes</b>	5.1 Track increase in number of donors/donor giving	Executive Director		X	X	X
	5.2 Track revenue year over year for each event	Executive Director		X	X	X

### Strategic Issue 1: Resource Development

**Goal:** Increase fundraising to support college initiatives and expand scholarships and other assistance to keep SUNY Orange education attainable for current and future students.

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
	5.3 Track number of corporate relationships, amounts given and type of college interaction	Executive Director		X	X	X
	5.4 Track college employee giving year over year.	Executive Director			X	X

### Strategic Issue: Student and Alumni Relations

**Goal:** SUNY Orange Foundation will deepen relationships with students and alumni and work to strengthen their lifelong connection to SUNY Orange and the Foundation.

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
<b>1. Strengthen relationship of Foundation with students while at OCCC.</b>	1.1 Work with the Admissions Office and Career Services to journey map the student experience to identify opportunities for the Foundation to engage with students.	Executive Director, Alumni		X		
	1.2 Continue to promote the Foundation in the Assembly with professors/clubs/groups as well as attend faculty/chair meetings to raise awareness of the Foundation.	Executive Director, Alumni		X		
	1.3 Develop a plan on how to gain feedback on how students want to be engaged with the Foundation and with alumni.	Alumni	Alumni Committee		X	
	1.4 Participate in health profession pinning ceremony; remain connected to the healthcare professions/cohorts/communities.	Alumni		X		
	1.5 Create a student/alumni group/mentorship program.	Alumni				X
<b>2. Identify ways alumni can remain</b>	2.1 Have alumni do workshops and Q&A sessions with student in different departments.	Alumni	Alumni Committee	X	X	X

**Strategic Issue: Student and Alumni Relations**

**Goal:** SUNY Orange Foundation will deepen relationships with students and alumni and work to strengthen their lifelong connection to SUNY Orange and the Foundation.

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
<b>connected and support and mentor students beyond financial contributions.</b>	2.2 Expand social media, alumni clubs, and connect alumni to student club leaders to foster ongoing connection to OCCC and other alumni and students.	Alumni	Alumni Committee		X	
	2.3 Host alumni appreciation events on campus.	Alumni	Alumni Committee	X	X	X
	2.4 Conduct regular surveys of alumni to learn about their interests.	Alumni		X	X	X
	2.5 Connect students with alumni who are in positions to offer jobs and/or internships	Alumni	Alumni Committee		X	
	2.6 Create chapters of alumni in select regions where significant groups of SUNY Orange alumni are living.	Alumni				X
	2.7 Create alumni speakers bureau	Alumni			X	
	<b>3. Increase alumni connections and giving</b>	3.1 Schedule outreach with alumni throughout the year based on their giving history and engagement to date.	Alumni	Alumni	X	X
3.2 Identify alum at all major employers in Orange County and organize outreach.		Alumni	Alumni Committee		X	
3.3 Identify alumni who have given at a lower level and develop marketing campaign to increase giving.		Alumni and Executive Director			X	
3.4 Identify alumni who have engaged at some level, but not yet given and create a direct mail campaign to encourage giving.		Alumni and Executive Director		X		
<b>4. Measure outcomes.</b>	4.1 Enter alumni engagement information in Raisers Edge and report out quarterly.	Alumni		X	X	X
	4.2 Compare number of alumni contacts in database year over year.	Alumni		X	X	X

**Strategic Issue: Student and Alumni Relations**

**Goal:** *SUNY Orange Foundation will deepen relationships with students and alumni and work to strengthen their lifelong connection to SUNY Orange and the Foundation.*

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
	4.3 Track alumni attendance at events.	Alumni		X	X	X
	4.4 Track student attendance at alumni events.	Alumni			X	X

### Strategic Issue 3: Communications and Public Relations

Goal: Bring awareness of the full resources provided through OCCC and the Foundation to all stakeholders.

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
<b>1. Develop a comprehensive communication plan targeted towards a range of audiences.</b>	1.1 Identify our unique audiences and develop targeted messaging and communication strategies for each.	Executive Director	Marketing		X	
	1.2 Develop an integrated fundraising and communications plan.	Executive Director, Alumni	Marketing	X		
	1.3 Clearly define and communicate how different forms of giving are supporting student success.	Executive Director			X	
	1.4 Work with the College to develop a communication strategy to reach out to the top employers within the county to build the case for corporate investment.	Executive Director	Marketing		X	
	1.5 Develop an annual donor report.	Executive Director	Marketing	X		
	1.6 Further customize annual fund mailing for multiple audiences.	Executive Director, Alumni	Marketing?	X		
<b>2. Promote OCCC as an important and affordable path to future educational and career experiences for fund-raising purposes.</b>	2.1 Work with Student Services to obtain data about graduation rates, transferring to 4 year colleges, etc. for storytelling purposes. Incorporate into marketing efforts	Alumni	Marketing	X		
	2.2 Continue to obtain quotes and testimonials from students and alumni about the impact of OCCC on their lives.	Alumni	Alumni	X	X	X
	2.3 Develop a PR plan to promote the quality and benefits of an OCCC education to potential donors.	Executive Director	Marketing		X	
<b>3. Develop county-wide PR campaign to raise awareness of SUNY Orange Foundation as a philanthropic opportunity.</b>	3.1 Identify budget and create marketing plan.	Executive Director, Alumni	Marketing		X	
	3.2 Coordinate with College Marketing Department for combined ads.	Executive Director			X	
	3.3 Create messaging, graphics and marketing pieces.	Executive Director, Alumni	Marketing		X	

<b>Strategic Issue 3: Communications and Public Relations</b>						
<i>Goal: Bring awareness of the full resources provided through OCCC and the Foundation to all stakeholders.</i>						
Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
<b>4. Measure Outcomes</b>	4.1 Track annual fund mailing impact by total dollars given, number of donors, number of alumni donors	Executive Director		X	X	X
	4.2 Track number of corporate sponsorships (event specific and annual partners)	Executive Director		X	X	X
	4.3 Track number of new donors, as a result of county-wide campaign	Executive Director			X	X
	4.4 Track social media engagement based on targeted messaging	Alumni	Marketing	X	X	X

## Strategic Issue 4: Human Resources & Organizational Capacity

Goal: *Develop the board and staff resources and organizational capacity to accomplish the organization's strategic plan. .*

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
<b>1. Re-evaluate and clarify administrative fees to better support and sustain the organization.</b>	1.1 Develop pro-forma budgets to evaluate impact of potential changes to management fee policies.	Executive Director/Finance	Finance	X		
	1.2 Revise language related to scholarship administrative fees and communicate these to all donors.	Executive Director	Finance, Investment, Executive		X	
	1.3 Determine whether and how to re-evaluate the types of investment funds we offer to ensure we are meeting market interests (e.g. socially responsible funds).	Executive Director, Finance	Investment Committee		X	
<b>2. Better utilize data for organizational planning and decision-making.</b>	2.1 Determine what data is needed for organizational decision-making.	Executive Director	Executive	X		
	2.2 Continue to work towards system integration that enables us to collect, evaluate, and communicate meaningful data, including visualization tools.	Executive Director		X		
	2.3 Utilize data in donor report to demonstrate impact.	Executive Director	Marketing	X	X	X
	2.4 Expand the definition of alumni and collect contact information from students who transfer before receiving degrees	Alumni	Alumni		X	
	2.5 Determine what KPI's are available through the college and utilize them to continue to tell our fundraising story.	Executive Director		X		
	2.6 Evaluate impact of events and campaigns to include friend-raising, fundraising, and mission impact goals.	Executive Director, Alumni	Marketing		X	
<b>3. Support, sustain, and develop staff capacity.</b>	3.1 Develop policies and standard operating procedures to orient new staff members to their roles.	Executive Director	Human Resources	X		
	3.2 Re-evaluate staff structure and job positions and grow staff capacity to accomplish goals.	Executive Director	Human Resources			X

## Strategic Issue 4: Human Resources & Organizational Capacity

Goal: *Develop the board and staff resources and organizational capacity to accomplish the organization's strategic plan. .*

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
	3.3 Develop a plan and allocate resources to support professional development for staff.	Executive Director	Human Resources		X	
	3.4 Re-evaluate compensation package to ensure competitiveness.	Executive Director	Executive		X	
	3.5 Identify opportunities for volunteers to support staff capacity.	Executive Director, Alumni	Alumni	X		
<b>4. Enhance board support and engagement.</b>	4.1 Strategically assess board composition and recruit to ensure we have composition from all needed sectors.	Executive Director	Executive	X	X	X
	4.2 Clearly define and communicate board expectations and build accountability to ensure a high performing board.	Executive Director	Executive	X	X	X
	4.3 Restructure board and committee meetings to support active participation and engagement.	Executive Director	Executive	X		
	4.4 Identify and develop the tools and resources to support the board's ability to be engaged and active members.	Executive Director	Executive		X	
	4.5 Better learn how board members wish to contribute in order to fully engage them.	Executive Director	Board Chair	X		
	4.6 Identify and coordinate board training opportunities to address the topics relevant to board leadership (e.g. fundraising, DEI).	Executive Director	Executive		X	
	4.7 Align board, staff, and committee priorities with strategic plan.	Executive Director	Executive	X		
	4.8 Review the strategic plan quarterly and revise as needed.	Executive Director	Executive	X	X	X
<b>5. Enhance Diversity, Equity and Inclusion Efforts</b>	5.1 Evaluate all Foundation events to assess equity and inclusion	Executive Director, Alumni	Diversity	X	X	X

**Strategic Issue 4: Human Resources & Organizational Capacity**

*Goal: Develop the board and staff resources and organizational capacity to accomplish the organization’s strategic plan. .*

Strategy	Actions	Staff Responsibility	Board or Committee Responsibility	Timeline		
				2022	2023	2024
	5.2 Ensure board continues to evolve and represent the students it serves.	Executive Director	Diversity	X	X	X
	5.3 Align scholarship efforts to ensure that the Foundation is proactively reaching and investing in a diverse student body.	Executive Director	Diversity, Scholarship	X	X	X