MISSION: The Office of College Advancement (OCA) is the fundraising, communications and marketing team for Baruch College. OCA supports the College’s strategic vision by securing the short and long term resources necessary for success, and by communicating and marketing the College’s vision, distinctive strengths, and needs to key constituencies both internal and external.

1. FUNDRAISING: The OCA will secure at least $15 million in new cash and pledge payments before June 30, 2005. We also anticipate closing between $12 and $20 million in new multiyear pledges in addition to the $54 million recently announced. We will welcome Dr. Kathleen Waldron as the focal point and national leader for fundraising at Baruch while also continuing the advantage we have gained by utilizing the School Deans for campaign and cultivation outreach.

a. TOTAL PROJECTED CASH FLOW: $15 to $18 million net cash. In FY 2004 the OCA secured nearly $11 million in cash a 20% increase over FY 2003, we project at least a 25% increase for 2005. Including new gifts and endowment income, the BCF has budgeted $13.4 million in support for Baruch College for FY 2005 – the Deans and Vice Presidents have detailed budget breakdowns for their respective units.

b. The Campaign for Baruch / Top 25: The Campaign for Baruch (launched in late 1995) has now successfully surpassed its goal of $150 million. It will be necessary to examine and decide the next steps for the Campaign for Baruch. Therefore we recommend the following actions for FY 2005:

   i. Baruch must undertake a Strategic Planning process that will inform the Campaign Case and financial needs.

   ii. We should quickly position President Kathleen Waldron as the national leader of our Campaign outreach.

   iii. We should celebrate the $150 million mark – with special attention to our new gifts of $25 million, $12 million, $10 million, and the multiple gifts at $2 million+.
iv. In the meantime, the OCA will continue to seek major gifts in support of the Top 25 ambition, in addition to expanding our efforts to secure a naming gift for SPA, and major support for the Weissman School.

v. The OCA should significantly improve its donor stewardship program this year – and insure that all major donors receive timely programmatic and financial reports.

vi. **The Annual Fund Campaign.** We must raise and receive $3,400,000 in unrestricted cash for FY 2005. This will represent a 15% increase from FY 2004 (N.B. FY 2004 Annual fund support increased over FY 2003 but was nonetheless disappointing since we did not surpass our $3.2 million goal.) We must put considerable efforts into greatly expanding our annual fund program in terms of dollars and donors. OCA will replace Karen Ellis, our recently departed Executive Director of Development – the new hire will be at the point of this program.

Therefore we are planning the following steps to significantly grow our annual fund program:

1. Secure three (3) committed and active **Bernard Baruch Dinner** honorees (Bernard Baruch Medal, Corporate Leadership Award, and Distinguished Alumnus Award by August 30th). We intend to net $1 million from this year’s dinner (last year’s yielded nearly $900,000 net).

2. We will reorganize the Annual Fund into an “Annual Giving Campaign” with targeted leadership, goals, timetables, and marketing support.

3. We are actively enhancing our President’s Circle ($20,000), Deans’ Circle ($10,000), Fellows ($5,000), and Bernard Baruch Society ($1,000) programs by recruiting chairs for each level and creating weekly radar screens to insure monthly progress toward our goals.

4. Direct Marketing Campaign: We will work with the results of a graduate marketing case study on the BCF’s direct mail campaign, implementing some of their strategies with the assistance of one of the marketing professors.

5. We will begin pilot programs that will bear fruit in future fiscal years including:
a. Targeted restricted giving initiatives to offer budget offsetting gifts where otherwise unrestricted cash would be used (ZSB, WSAS, SPA, Newman Library, Student Services, Faculty support).
b. Explore creation of “Ranger / Pioneer” structure for volunteers with personal goals and benefits.
c. We will plan the launch of a Fall 2006 high-end golf outing.
d. We will continue to grow the “friends and family” campaign for Baruch faculty and staff.

6. We plan to secure the $3,400,000 as follows:

   a. Major Gifts & Fellows: $1,200,000
   b. Bernard Baruch Dinner: $1,000,000
   c. Previous Pledge Payments: $400,000
   d. Direct Marketing: $400,000
   e. Bernard Baruch Society: $300,000
   f. Friends & Family: $50,000
   g. Corporate: $25,000
   h. Foundations: $25,000

   c. **Alumni Relations:** As referenced above, we will create and launch the an enhanced *Baruch College Alumni Relations program* in FY 2005. Limited alumni engagement is (and has always been) a fundamental problem for Baruch. We have never had an integrated Office of Alumni Relations coordinating the communication and outreach to our alumni. Therefore, OCA will:

      i. Create the Office of Alumni Relations and immediately staff it with a Director of Alumni Relations reporting to OCA.
      ii. Launch a marketing campaign to educate our alumni about Baruch’s excellence, its needs, and the new Baruch Alumni Office and its “membership” benefits.
      iii. Increase the percentage of alumni giving or joining by 20% during FY 2005.

2. **COMMUNICATIONS AND MARKETING:** Several major events will form the basis for key initiatives and inform many of our other annual activities in the coming year: our new President, the announcement in the fall of several historic new gifts, and the launch of the Baruch / Merrill Lynch Entrepreneurship Competition.
a. **Public Relations:** We will introduce and promote President Kathleen Waldron – she will “headline” our promotional efforts including those surrounding the announcement of the historic gifts. We will continue to focus our PR efforts on our defined priorities: Entrepreneurship, Financial Integrity, Real Estate, Global Business, SPA, and the Performing Arts. We will also, as always, continue to publicize college events and news.

b. **Baruch College Magazine:** We will complete the rollout of the third issue of the magazine. We continue to refine it for its primary audience: alumni, and to support the desired outcomes: readership and giving.

c. **Advertising:** We will be refocusing our campaign “American Dream Still Works” (now entering year three) and adapting the program in light of budget restraints. The Campaign will become more direct marketing focused. Alumni success stories will be adapted into the campaign plan.

d. **School Marketing Materials:** We will be supporting the creation and publication of a suite of marketing materials for all three schools.

e. **Website / Electronic:** We will complete the homepage redesign and the architecture for supporting school, center, and institute websites. We will be launching several new “e-Newsletters” this year. We will launch a full defined BCF website in September.

f. **Alumni Communications:** We will support the rollout of the Baruch Alumni Office by creating an unique look for the communications and marketing program:

g. **Signage:** We will lead the new signage for the campus with special attention to the newly named facilities.

3. **CAREER DEVELOPMENT CENTER (CDC):** THE CDC will seek to insure that more than 50% of our undergraduates will have positive employment outcomes by graduation in June 2005 (N.B. We define positive outcomes as employed fulltime in the field of their choice or accepted in graduate school). We fell just short of this goal in FY 2004. We are in year two of a three-year restructuring that includes creating a four-year experience for undergraduates including the development of “soft” skills in freshman and sophomore years. Weekly tracking reports and a comprehensive and mandatory graduation survey are now in place to assess the number of students and companies interacting with the CDC and our outcomes at commencement -- these reports will allow year-by-year comparisons and vital data for management decisions.

4. **EXECUTIVES-ON-CAMPUS:** Launched in 2001, with the goal of engaging executives as lecturers, mentors, and advisors for Baruch’s faculty and students, EXECUTIVES-ON -CAMPUS (EOC) has been wildly successful and could become a distinctive program for Baruch. Recognition of this program both within Baruch and in the business and public affairs communities of New York and beyond has grown dramatically, and EOC has become a major resource of talent and expertise for the college. In total, 188 executives participated in 2003–2004. There were 78 classroom guest lectures, five multi-executive career and industry gatherings, and 25 pairings of students with executives in the newly launched Executive-Student Partnership (ESP), the one-on-one mentoring program. (In 2004-2005, there will be in
excess of 60 pairings.) In addition, there are now four “executive faculty members” in residence at Baruch, teaching one or more whole course sections. In 2004–2005, the College will foster growth in this program through the creation and implementation of the Tuesday Career Hour (which corresponds and balances in students’ schedules with the Thursday Club Hour slot). It is anticipated that more than 200 executives will participate in EOC in 2004–2005, providing students with career-focused topics of greatest interest to them. The major limiting factor is the number of faculty asking for guest lecturers, thus limiting the faculty’s and students’ exposure to successful role models and opportunities for networking, dialogue and research.