

**SAM HOUSTON STATE UNIVERSITY**  
**University Advancement**  
**Department Heads Mini-Retreat at Gibbs Conference Hall**  
**September 13, 2016**

- 8:30     Light breakfast
- 9:00     Welcome and overview of the day – Frank
- 9:15     Review and discussion of Mission, Vision and Goals - Frank
- 9:45     Brief review of budget and HEAF for 2016-17 – Carol
- 10:00    Comprehensive campaign overview and discussion – Thelma
- a.    Definition of comprehensive campaign
  - b.    Brief review of feasibility study and silent phase activities
  - c.    Campaign structure and leadership
  - d.    Prospect identification and sharing “leads”
  - e.    Amount given and pledged to date
  - f.    Campaign kickoff and public announcement of goal
  - g.    Brief overview of campaign schedule
- 10:45    Break
- 11:00    Moving the Alumni Association to the next level: Discussion – Charlie
- a.    Ideas for expanding the membership base
  - b.    Increasing visibility of Life Membership to grow the base
  - c.    Generating additional sponsorship income
  - d.    New and improved programming to engage with alumni
  - e.    Expanding staff and outreach (what is needed and when)
- Noon     Annual giving discussion – Thelma
- a.    Ideas for expanding the donor base
    - Retaining donors
    - Securing new givers
  - b.    Moving donors to higher giving society membership
- 12:30    Lunch
- 1:15     Marketing & Communications overview and programming – Kris
- a.    Review of organizational chart, staff responsibilities and their locations
  - b.    Timetable for Thomason and space for staff once complete
  - c.    Discussion – effectively integrating and leveraging the “Heroes Will Rise” campaign
  - d.    Update on email management system and discussion of potential usage
  - e.    What’s next on the horizon? New and/or improved technology
  - f.    How do we effectively coordinate marketing

2:15 Museum discussion – Mac

- a. Securing greater visibility for the museum as a unit and part of SHSU
- b. Friends
  - Importance of support group(s)
  - Potential strategies to increase and retain members
- c. Other possible fund-raising activities (events and fund-raising)

3:00 Break

3:15 Advancement Services – Patty

- a. Overview of effectiveness of software and hardware installed within the past 3 years
- b. Assessment of current staffing
- c. Biggest challenges ahead
- d. Potential future needs

3:45 Performance Measure Report review – Frank

- a. Review of 2015-16 results to date
- b. Adding and deleting items to track for 2016-17
- c. Preliminary Goals for 2016-17

4:30 Discussion regarding division-wide retreat – What (purpose), who, when, & where

4:50 Wrap up and adjourn