



## **ARCS® Foundation Oregon Long Range Plan 2018 – 2022**

### **Summary**

In 2017 the Oregon Chapter reached its 13-year mark. It was time to analyze the results of the 2011-16 LRP, ask ourselves hard questions, and address issues we were facing due to our fast growth. A retreat was scheduled in January 2017 where we addressed four areas: Scholar Awards, the Chapter's Signature Event, Leadership and Board Structure

The Oregon Chapter has numerous strengths to build upon:

- A talented and dedicated membership
- A solid and successful track of scholar support
- A strong relationship with our university partners

Areas that need to be addressed to secure the sustainability of our chapter include:

- Member growth and satisfaction
- Donor retention through cultivation and stewardship
- Maintain good relationships with university partners and scholars
- Development of strong leadership
- Board restructure to accommodate time management and member demographics
- Ensure that best practices are used to meet the future needs of the organization

Over the next five years ARCS Portland intends to build upon its strengths and capitalize on the opportunities outlined in this plan. If past success is the best predictor of future performance our future is bright.

### **ARCS Foundation Mission**

ARCS Foundation advances science and technology in the United States by providing financial awards to academically outstanding U.S. citizens studying to complete degrees in science, engineering, and medical research.

### **Oregon Chapter Vision Statement**

We support American scientists' dreams of being light years ahead.

## Goal 1 – Increase the number of annual scholar awards

Strategies	Performance Goals
<p><b>1. Cultivate, recognize and retain donors</b></p>	<ol style="list-style-type: none"> <li>1. Cultivate scholar award donors to commit to funding a scholar award every three years</li> <li>2. Develop cultivation plan</li> <li>3. Organize lab tours for donor cultivation purposes</li> <li>4. Develop stewardship plan</li> <li>5. Arrange scholars to speak at events for cultivation and stewardship</li> <li>6. Engage and educate membership on philanthropy and sense of urgency to build funding capabilities for ARCS with consistent messaging</li> <li>7. Update development materials annually and disseminate strategically</li> </ol>

Strategies	Performance Goals
<p><b>2. Develop additional funding sources</b></p>	<ol style="list-style-type: none"> <li>1. Develop specific strategies to maximize SAL</li> <li>2. Target new member and non-member donors</li> <li>3. Develop strategy to increase corporate philanthropy</li> <li>4. Develop strategy to increase community and family foundations</li> <li>5. Maintain and increase number of scholar awards each year based on university capacity</li> <li>6. Develop list of individual donor prospects including alumni and scholar mentors</li> <li>7. Utilize CiviCRM on website to track donor data</li> </ol>

Strategies	Performance Goals
<p><b>3. Develop additional funding mechanisms</b></p>	<ol style="list-style-type: none"> <li>1. Research and implement planned giving program</li> <li>2. Increase number of restricted endowments</li> <li>3. Build university matched endowment model (UME)</li> </ol>

Strategies	Performance Goals
<b>4. Identify and develop high value partnerships</b>	<ol style="list-style-type: none"> <li>1. Research forming an advisory council to expand philanthropy and opportunities</li> <li>2. Actively advocate for ARCS during the process of arranging monthly programs with potential speakers</li> <li>3. Research community partner opportunities</li> </ol>

**Goal #2 – Engage membership to enhance commitment**

Strategies	Performance Goals
<b>1. Achieve high levels of member satisfaction</b>	<ol style="list-style-type: none"> <li>1. Create membership satisfaction survey as needed</li> <li>2. Create interesting and engaging events</li> <li>3. Improve member attraction, retention and engagement statewide</li> <li>4. Establish a plan to educate, engage, and honor Charter Members</li> </ol>

Strategies	Performance Goal
<b>2. Assure intentional and well managed membership growth</b>	<ol style="list-style-type: none"> <li>1. Strategically increase membership</li> <li>2. Explore opportunities to engage members statewide</li> <li>3. Provide orientation for new members</li> <li>4. Evaluate members' skills to forecast future needs</li> <li>5. Assess/update membership recruitment materials</li> <li>6. Maintain effective record-keeping systems</li> </ol>

Strategies	Performance Goals
3. Encourage active participation of all members	<ol style="list-style-type: none"> <li>1. Educate members about participating in ARCS</li> <li>2. Explore ways all members are integrated into ARCS and placed on targeted committees</li> </ol>

Strategies	Performance Goals
4. Address the educational mission of the organization	<ol style="list-style-type: none"> <li>1. Address the educational mission of ARCS by creating interesting programs for members and guests</li> <li>2. Research travel/educational excursion opportunities for the membership (outside of Oregon)</li> </ol>

**Goal #3 – Sustain and enhance partnerships with Oregon’s leading graduate programs**

Strategies	Performance Goals
1. Maintain and nurture relationships with existing university partners	<ol style="list-style-type: none"> <li>1. Work with OHSU, OSU, UO public information staff for scholar achievements and stories</li> <li>2. Schedule site visits with university colleges/schools every 5 years per ARCS national requirements</li> <li>3. Determine ways to better serve university partners and committee members</li> <li>4. Engage with ARCS scholars’ mentors</li> </ol>

Strategies	Performance goals
1. Maintain and nurture relationships with scholars	<ol style="list-style-type: none"> <li>1. Establish meaningful relationship with chapter scholars and scholars who don’t have personal relationship with donors</li> <li>2. Expand meaningful relationship with current scholars</li> <li>3. Expand meaningful relationship with scholar alums</li> <li>4. Enhance system for tracking scholars</li> </ol>

Strategies	Performance Goals
<p><b>2. Investigate program expansion with current and new university partners</b></p>	<ol style="list-style-type: none"> <li>1. Manage growth with existing university partners</li> <li>2. Manage growth at OHSU</li> <li>3. Manage growth at OSU</li> <li>4. Manage growth at UO</li> <li>5. Assess and allocate scholar awards to ARCS supported programs</li> <li>6. Research Portland State University programs/departments rankings for eligibility</li> </ol>

**Goal #4 – Ensure chapter vitality**

Strategies	Performance Goals
<p><b>1. Increase visibility and name recognition for ARCS and Portland Chapter</b></p>	<ol style="list-style-type: none"> <li>1. Enhance brand awareness in Oregon</li> <li>2. Research and develop messaging tools for appropriate audiences               <ol style="list-style-type: none"> <li>a. Members</li> <li>b. Community (to differentiate ourselves from other organizations with scholarships)</li> <li>c. Scholars/Alums</li> <li>d. University partners</li> <li>e. Corporations/Foundations</li> </ol> </li> <li>3. Improve branding in ARCS communications</li> <li>4. Create social media opportunities and member training</li> <li>5. Evaluate communication pieces and tools</li> </ol>

Strategies	Performance Goals
<p><b>2. Maintain high standards of fiscal responsibility</b></p>	<ol style="list-style-type: none"> <li>1. Finance Committee works with Development, University Relations, and Member Relations in planning for optimum number of members/awards for Oregon Chapter</li> <li>2. Review and evaluate current scholar award levels and timing</li> <li>3. Determine a realistic goal for scholar award capacity of the 3 university partners</li> <li>4. Develop a succession plan for positions of Treasurer and Assistant Treasurer</li> <li>5. Develop a plan to educate/train committee chairs about budgeting, considering goals and outcomes</li> <li>6. Analyze goals and outcomes of each event to prioritizing spending</li> <li>7. Maintain and develop finance policies and procedures</li> <li>8. Review income streams to ensure fiscal soundness</li> <li>9. Develop sound financial oversight</li> <li>10. Build the university matched endowment program (UME)</li> <li>11. Manage chapter endowments, including the 10<sup>th</sup> Anniversary Fund</li> <li>12. Manage bequest agreements</li> </ol>

Strategies	Performance Goals
<p><b>3. Ensure governance policies follow best practices to meet future needs of the organization</b></p>	<ol style="list-style-type: none"> <li>1. Develop a leadership succession plan</li> <li>2. Each committee maintain leadership succession plan</li> <li>3. Review and assess board structure to address chapter growth</li> <li>4. Review nominating committee structure</li> <li>5. Review and amend bylaws</li> <li>6. Research and review standing rules</li> <li>7. Develop, review and revise policies and procedures</li> <li>8. Monitor independent contractor position</li> <li>9. Committees submit year-end report to President</li> <li>10. Develop tools to help chapter follow best practices</li> </ol>