



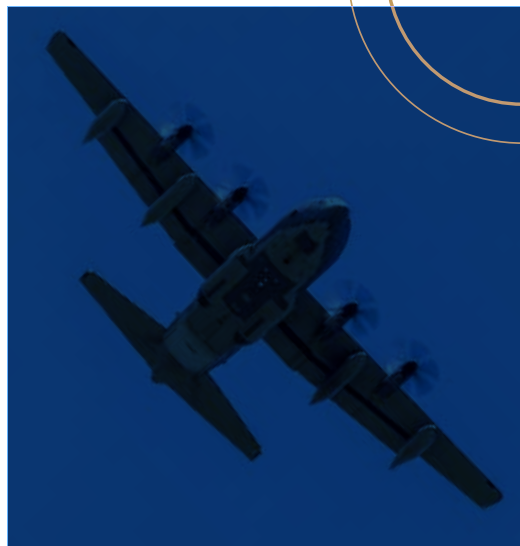
JOINT STRATEGIC PLAN

► 2023-2028

Our mission is to serve graduates, preserve the heritage of the Academy and Long Blue Line and support USAFA in its mission to develop leaders of character for the Air Force, Space Force and nation.

JOINT STRATEGIC PLAN

► 2023-2028



The following is the final 5-year joint strategic plan for the Association of Graduates and Air Force Academy Foundation. The plan constitutes a detailed joint strategy for the AOG and Foundation from 2023-2028.

The timeline for the final strategic plan includes an execution and evaluation phase from 2023-2027. During this phase, we will successfully conclude the Defining Our Future comprehensive campaign, conduct a board-level review of the plan, and explore the next campaign focused on mission imperatives and Academy priorities. The plan then takes us into an evaluative phase in 2028, when another board-level review commences.




VISION

To be an Association and Foundation of influence and impact, supporting the Academy's enduring mission of developing leaders of character for the nation, and providing a lifetime of service to the Long Blue Line.



MISSION

Together, we support the Academy, serve our graduates and preserve the heritage of the institution.



ENGAGEMENT

CULTIVATE LIFELONG RELATIONSHIPS AND PROVIDE VALUED SERVICE TO THE ACADEMY AND OUR GRADUATES

1. CREATE AND FOSTER LIFELONG CONNECTIONS BETWEEN THE LONG BLUE LINE AND THE ACADEMY

A. Grow membership to be reflective of the entire Long Blue Line

- Metric: Increase membership 5% every year with a goal of 85% membership by 2028 – *OPR Alumni Relations*
- Metric: Achieve 95% membership for Class of 2026 and classes that follow – *OPR Alumni Relations*
- Metric: Develop engagement scoring system to track graduate level of connection by 2023 – *OPR Alumni Relations*
- Metric: Perform, analyze and respond to all-graduate survey every third year – *OPR Communications*

B. Revitalize class- and affinity-based programming

- Metric: Establish young alumni strategy by 2023 – *OPR Alumni Relations*
- Metric: Assess current reunion program and establish success metrics by 2023 – *OPR Alumni Relations*
- Metric: Review and publish updated operating instructions to formalize new way ahead for Class Advisory Senate in 2023 – *OPR Alumni Relations*

C. Inform and engage cadet parents and families

- Metric: Assess current Family Plan Membership Program and develop strategy for 2023-2028 – *OPR Parent Relations*
- Metric: Perform cadet/parent/family survey to inform way forward by 2024 – *OPR Communications*

D. Strengthen graduate engagement

- Metric: Develop USAFA graduate portal for one-stop-shop engagement and connection with cadets and Academy permanent party by 2023 – **OPR Alumni Relations**
- Metric: Create AOG satellite location in Fairchild Hall by 2025 – **OPR Academy Relations**
- Metric: Assess current legacy class programming and create legacy class programming strategy by 2023 – **OPR Alumni Relations**
- Metric: Develop a strategy to increase awareness of and the case for support for cadet candidate and cadet programs by 2023 – **OPR Alumni Relations**

2. SERVE OUR GRADUATES AND FAMILIES AT CRITICAL MOMENTS THROUGHOUT THEIR LIFETIMES

A. Provide Firstie transition and first-assignment support

- Metric: Establish first-year, post-graduation touchpoint campaign by 2023 – **OPR Alumni Relations**
- Metric: Establish first-assignment ambassador program by 2024 – **OPR Alumni Relations**

B. Offer meaningful career services and transition support

- Metric: Establish mentorship program by 2024 – **OPR Alumni Relations**
- Metric: Launch graduate career resources hub in 2023 – **OPR Alumni Relations**
- Metric: Assess current career programs, such as SACC (Service Academy Career Conference), and create career transition strategy/process for graduates by 2024 – **OPR Alumni Relations**

C. Serve graduates and their families with funeral support as part of Gone but Not Forgotten program

- Metric: Establish Memorial Service Support office at AOG in 2023 – **OPR Operations**
- Metric: Create Gone but Not Forgotten (GBNF) plan to encompass all notifications and publications by 2024 – **OPR Communications**
- Metric: Raise endowment for Memorial Service/GBNF program by 2025 – **OPR Development**

ENGAGEMENT

- ▶ Cultivate lifelong relationships and provide valued service to the Academy and our graduates

3. PRESERVE AND CELEBRATE THE ACADEMY'S HERITAGE AND THE ACCOMPLISHMENTS OF THE LONG BLUE LINE

A. Further promote awards programs

- Metric: Revitalize young alumni award program by 2024 – *OPR Alumni Relations*
- Metric: Establish new awards to celebrate contributions to Space Force – *OPR CEO/President*
- Metric: Develop process that expands the diversity and breadth of nominations – *OPR CEO/President*

B. Expand online heritage archives

- Metric: Ensure meaningful web and digital presence for all award recipients and graduate accomplishments with initial phase completed by December 2022 – *OPR Academy Relations*
- Metric: Identify and select best digital tools for online class oral histories for all classes by December 2022 – *OPR Academy Relations*
- Metric: Add full-time heritage officer to increase support for maintaining the AOG Collection – completed June 2022 – *OPR Academy Relations*

C. Develop and promote the Heritage Trail

- Metric: Review and revise Heritage Trail development policy by December 2022 – *OPR Academy Relations*
- Metric: Complete Heritage Trail master plan and vision for additional exhibits in 2022 – *OPR Academy Relations*
- Metric: Create sustainable recognition for Distinguished Graduates by 2023 – *OPR Academy Relations*
- Metric: Add major nodes through class and individual giving by 2030 – *OPR Development*



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PHILANTHROPY

ENHANCE FINANCIAL STRENGTH AND STABILITY TO ADVANCE THE ACADEMY AND SUSTAIN OUR MISSION

1. LEAD SUCCESSFUL COMPREHENSIVE CAMPAIGN – DEFINING OUR FUTURE

A. Raise \$270 million for critical Academy priorities

- Metric: Raise \$270 million by 2025 – *OPR Development*
- Metric: Fund the Madera Cyber Innovation Center, Falcon Stadium, Institute for Future Conflict, New Foundation Administration Building and North Gate Visitor Center – *OPR Development*

B. Increase awareness, engagement and participation among all constituents

- Metric: Increase graduate giving participation rate to 20% by 2025 – *OPR Development*
- Metric: Establish method for measuring graduate participation in the campaign – *OPR Development*
- Metric: Reach 50% graduate participation in the campaign by 2025 – *OPR Development*

C. Enhance institutional pride among all stakeholders

- Metric: Perform comparison and analysis of 2022 to 2025 survey results – *OPR Communications*

D. Advance understanding of philanthropy's role and impact at the Academy

- Metric: Develop a process for consistent, detailed reporting from Academy partners for use in stewardship reporting – *OPR Stewardship*

MAN'S FLIGHT
THROUGH LIFE IS
SUSTAINED BY THE
POWER OF HIS
KNOWLEDGE.

2. GROW RESOURCES AVAILABLE TO SUSTAINABLY FUND ONGOING OPERATIONS

A. Increase funding to cover a greater share of operating costs

- Metric: Increase value of Founding Director Fund to \$30 million by 2026 – *OPR Development*
- Metric: Increase Air Force Academy Fund committed dollars to \$3 million annually by 2024 – *OPR Development*
- Metric: Launch new Giving Day initiative in 2022; grow and refine annually – *OPR Development*
- Metric: Assess current sponsorships and establish sponsorship strategy in 2023 to increase sponsorship revenue by 200% by 2024 – *OPR Alumni Relations*

B. Establish restricted endowments for specific operating activities

- Metric: Identify funding needed for specific operating activities and establish fundraising goals by 2023 – *OPR Development*
- Metric: Reach established fundraising goals by 2025 (e.g., *Checkpoints*, funeral and Gone but Not Forgotten support) – *OPR Development*

3. EXPAND AND DIVERSIFY SUPPORT FROM SUCCESSIVE GENERATIONS OF DONORS

A. Leverage the value of the Long Blue Line to create strengthened relationships between generations

- Metric: Provide roadshow resources for board and senior staff travel as well as for in-person and virtual events – *OPR Communications*
- Metric: Establish Entrepreneur Affinity Group in 2023 and launch supporting programs by 2024 – *OPR Alumni Relations*

B. Strengthen and expand class giving

- Metric: Create a structured plan, leveraging class year, for a donor's giving journey by 2023 – *OPR Development*
- Metric: By 2024, begin deployment of aforementioned plan to raise annual graduate participation rates – *OPR Development*

PHILANTHROPY

- ▶ Enhance financial strength and stability to advance the Academy and sustain our mission

C. Build diversity and capacity of volunteers, including committee and board members

- Metric: Develop process to identify, recruit and support the next generation of distributed group leaders by 2024 - ***OPR Alumni Relations***
- Metric: Develop and refine volunteer structure and role descriptions with the help of Alumni Relations by 2023 - ***OPR Stewardship***
- Metric: Refine metrics used in AOG Board recruiting - ***OPR CEO/President***
- Metric: Increase number of Founding Directors under age 55 - ***OPR Development***

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STEWARDSHIP

RESPONSIBLY SEEK AND MANAGE GIFTED TIME, TALENT, TREASURE AND RELATIONSHIPS

1. ACCEPT, INVEST AND STEWARD GIFTS AS DONORS INTEND

A. Provide accurate and timely reporting on all gifts annually

- Metric: Send all stewardship reports by April 1; process all charitable contributions within three business days of when they are received; receipt all charitable contributions within four business days of when they are received; deliver acknowledgment within 48 hours of gift posting – **OPR Stewardship**

B. Improve Academy gift acceptance and reporting process

- Metric: Develop mechanisms to ensure proper use of gifts/distributions by Academy within one year of transfer – **OPR Finance**
- Metric: Receive annual reporting from Academy on use and impact of gifts from both organizations – **OPR Stewardship**

2. INVEST ALL HUMAN AND FINANCIAL RESOURCES SMARTLY TO MAXIMIZE RETURN AND IMPACT

A. Maintain accurate accounting records and strong financial and management controls

- Metric: Receive unqualified annual financial statement audits and timely file all IRS Forms 990 for both organizations – **OPR Finance**
- Metric: Establish and maintain an appropriate internal control structure – **OPR Finance**
- Metric: Prepare meaningful combined financial reports of both organizations for effective decision-making to president and joint finance committees for FY2021 – **OPR Finance**

B. Manage investment portfolios responsibly, utilizing experienced guidance

- Metric: Uphold the respective investment policies of each organization – *OPR Finance*

C. Establish priorities for best use of available resources, including unrestricted gifts

- Metric: Create process with superintendent for strategic use of unrestricted giving – *OPR CEO/President*
- Metric: Analyze and enact recommendations from Technology Efficiencies Work Group (actions will be completed 2022-2024) – *OPR Operations*
- Metric: Conduct cost/benefit review of current Alumni Relations programs by 2023 – *OPR Alumni Relations*
- Metric: Prepare annual operating budgets that meet organizational goals in a fiscally responsible manner – *OPR Finance*

3. NURTURE STRONG RELATIONSHIPS WITH THE ACADEMY AND PARTNER ORGANIZATIONS

A. Deepen operating partnerships with supporting organizations

- Metric: Conclude Memos of Understanding with ARDI and Falcon Foundation in 2022 – *OPR Academy Relations*

B. Secure and maintain “special status” as supporting organizations

- Metric: Secure special status in 2022 – *OPR CEO/President*

C. Institutionalize strong connections with key Academy partners

- Metric: Create (by October 2022) and launch (by December 2022) US-AFA roadshow with Academy partners – *OPR Academy Relations*



COMMUNICATION

TELL THE STORY OF OUR ACADEMY, OUR GRADUATES AND OUR MISSION WITH OUR WORDS AND ACTIONS

1. ENHANCE AND SAFEGUARD BRAND AND REPUTATION OF AOG AND FOUNDATION

A. Ensure brand is relevant and consistent in look, feel and voice

- Metric: Explore benefits of rebranding AOG/AFAF; develop recommendations and roadmap as needed in 2023 – *OPR Communications*

B. Conduct a mission-focused merchandise strategy

- Metric: Maintain operating margin/increase quality of products in 2023 – *OPR Operations*
- Metric: Implement new commerce system for enhanced shopping experience in 2023 – *OPR Operations*

C. Provide world-class customer service to all constituents

- Metric: Create a constituent relations front office that is the main source of information (planned completion in 2022) – *OPR Operations*
- Metric: Enhance constituent response process through new operating procedures in 2023 – *OPR Operations*

D. Deliver professional image in-person and through events

- Metric: Create and implement standard event process flow to increase consistency and to elevate brand awareness, increase engagement and strengthen pride-in-place by 2023 – *OPR Stewardship*
- Metric: Establish virtual event strategy/process in 2023 – *OPR Alumni Relations*



2. SHARE THE STORY OF THE ACADEMY AND OUR GRADUATES IN DIVERSE AND EFFECTIVE WAYS

A. Create engagement and instill pride through compelling stories about graduates and the Academy across all platforms

- Metric: Develop tailored communication strategies for six decades of graduates, using survey personas to guide the approach in 2022/2023 – *OPR Communications*
- Metric: Explore production of and create staffing plan for podcast series launching in 2022/2023 – *OPR Communications*
- Metric: Implement quality-control processes and policies for communications – implemented 2022 and ongoing – *OPR Communications*

B. Increase information engagement of younger graduates

- Metric: Use engagement data to create and sufficiently staff and continually refine a social media plan in 2022 – *OPR Communications*
- Metric: Evaluate efficacy of new channels through survey instruments in 2022-2028 – *OPR Communications*

C. Tell stories about USAFA's rich history and heritage

- Metric: Thoughtfully utilize *Checkpoints*, Heritage Minutes, audio production and other channels – *OPR Communications*
- Metric: Begin class and oral history project in January 2023 – *OPR Academy Relations*

3. MAINTAIN READINESS FOR SUCCESSFULLY NAVIGATING CRISES AND ADVERSE DEVELOPMENTS

A. Establish and maintain crisis communications plan

- Metric: Develop Crisis Communication Plan – completed February 2022 – *OPR Communications*
- Metric: Review and, as necessary, update crisis communications plan in 2023 – *OPR Communications*

B. Create proper succession planning for key leadership roles

- Metric: Prepare formal succession plan for review by both boards in 2022 – *OPR CEO/President*

ORGANIZATIONAL EXCELLENCE

ALIGN OUR VALUES, OUR CULTURE AND OUR COMMITMENT AS A TEAM TO DRIVE OVERALL EFFECTIVENESS OF OUR MISSION

1. FOSTER A CULTURE OF OPERATIONAL EXCELLENCE, TEAMWORK AND RESPECT, AND AN ENVIRONMENT THAT NURTURES INNOVATION

A. Tirelessly pursue excellence in every aspect of our work

- Metric: Establish clear and repeatable processes within each department to support staff and programs by 2024 - *OPR CEO/President*
- Metric: Conduct board-led assessment of strategic plan and organizational progress in 2025 - *OPR CEO/President*

B. Diversify boards and staff

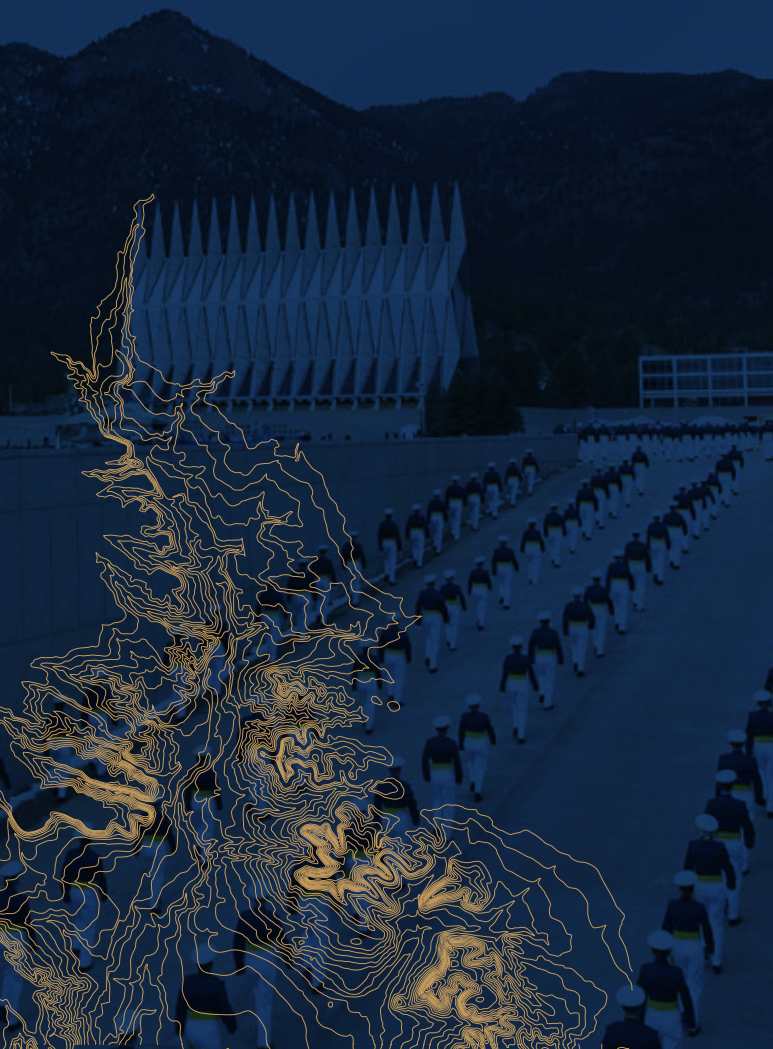
- Metric: Ensure that boards and staff increasingly represent the diversity of the Long Blue Line - *OPR CEO/President*
- Metric: Conduct annual evaluation of board representation and needs - *OPR CEO/President*

C. Actively seek feedback

- Metric: Retain professional firm to conduct employee survey in 2023 - *OPR Finance*

D. Execute Doolittle Hall Campus Master Plan

- Metric: Complete Doolittle Campus lease, and launch design of new administration building in 2022 - *OPR Academy Relations*



2. RECRUIT, DEVELOP AND RETAIN TOP-LEVEL TALENT

A. Support competitive pay and benefits

- Metric: Conduct compensation and benefits survey and recommend adjustments as needed to remain competitive in 2023 - *OPR Finance*

B. Provide ongoing training and professional development for staff and supervisors

- Metric: Conduct supervisor training in summer 2022 - *OPR Finance*
- Metric: Create professional development plan for staff by end of 2023 - *OPR Finance*

C. Provide meaningful recognition programs

- Metric: Evaluate the effectiveness of Lightning Impacts program annually; adjust as needed - *OPR Finance*

3. EXHIBIT OUR CORE VALUES IN EVERYTHING WE DO – INTEGRITY, SERVICE, EXCELLENCE

A. Comprehensive onboarding for new employees, including introduction to senior leadership

- Metric: Annually update our standard onboarding process - *OPR Finance*

B. Encourage and reward demonstration of core values

- Metric: Highlight demonstration of core values through the Lightning Impacts program; adjust as needed to reinforce core values - *OPR Finance*

C. Incorporate core values as part of the annual evaluation process

- Metric: By the end of 2022, update employee performance evaluation forms to include a section related to core values - *OPR Finance*





INTEGRITY FIRST.

SERVICE BEFORE SELF.

EXCELLENCE IN ALL WE DO.



"FOUR YEARS AT USAFA IS A TRANSFORMATIONAL JOURNEY WHERE THE SEEDS OF KNOWLEDGE, CHARACTER, AND DISCIPLINE ARE PLANTED FOR CADETS TO GROW INTO TOMORROW'S LEADERS. WE SEEK TO BRING TOGETHER THE STRENGTH OF THE ACADEMY AND THE LONG BLUE LINE TO ENSURE EXCELLENCE IN *EACH* CADET'S JOURNEY."

▶ **DR. APRIL SULLIVAN FITZGERALD '87, P '17, P '23, P '25**
Secretary, Air Force Academy Foundation board





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▶ 2023-2028