University of Missouri Extension Development Program:
Consolidation Plan

February 24, 2005
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INTRODUCTION

It is the mission of University of Missouri Extension to improve Missourian’s lives by addressing their highest priorities through the application of research-based knowledge and resources. It is our vision that we can improve people’s lives through relevant, lifelong learning. Our challenge is to carry out the mission and achieve the vision within a climate of shrinking resources. Even within this climate, we must be poised to provide a level of excellence in programming that is recognized in Missouri and across the nation. As we focus on our three priority program areas of enhancing economic viability; building strong individuals, families and communities; and creating healthy environments, we must insure that we have the tools necessary for success. This is possible only if we have adequate funds.

Due to shrinking resources from traditional funding sources, it is imperative that colleges and universities explore new funding streams to support priority programs. At the same time, new organizational structures for extension provide opportunities to strengthen funding programs and practices.

On Jan. 1, 2004, University Outreach and Extension consolidated with University of Missouri – Columbia. This consolidation means that the Columbia campus is the “managing partner” of extension. Dr. Tom Henderson, interim vice provost and director of extension, appointed nine work groups to make recommendations as to how extension might consolidate effectively and efficiently with the campus around a number of priority areas.

The Resource Development Work Group was asked to develop recommendations for establishing a strong endowment and gifts program. This would require creating a resource development program that would essentially be a part of the campus program, but would allow for differences necessitated by the unique characteristics of extension.

This document outlines recommendations for developing and implementing such a program. It may also be found at http://extension.missouri.edu/staff/development/documents/development_plan.pdf.
PROCESS UNDERTAKEN

The Resource Development Work Group engaged in a process that included expansive research and strategic thinking to develop a set of recommendations to chart the future and insure success in fund raising. At all times, the work group was guided by the mission of MU Extension and the set of principles herein. The work group functioned as a learning organization, with each member continuing to learn from the entire group.

The work group consisted of representatives from the MU Office of Development, extension administration, regional specialists and administration, and the 4-H Foundation. A communications coordinator was named to the work group to engender communication across work groups. Each member brought a unique perspective, deep knowledge and broad experience to the task.

The work group met seven times. The first task was to determine a process that would enable the group to:

1. Build a common philosophical and knowledge base (Revenue Generation Plan, Gaut and Rome fundraising proposals, campus gift program, 4-H Foundation gift program, etc.);
2. Understand and learn from the history of giving in extension, the 4-H foundation and the Columbia campus; and
3. Become familiar with current development structures and processes in extension, in the 4-H foundation and at MU.

To reach consensus, ongoing discussion took place around each issue topic of resource development. Each person was allowed to add his or her input before the issue was decided. Care was taken to develop a program that would complement the other giving opportunities. The group was able to build upon a number of meetings that had occurred previously with the campus for the purpose of consolidating development functions.

The work group developed a set of questions to focus members’ thinking. These were prioritized as short- and long- term questions. The questions were kept in the forefront for group discussion and were addressed individually. The process resulted in answers that are embodied in the following set of recommendations, action steps and budget.
GUIDING PRINCIPLES

The University of Missouri Extension Development Program will:
1. Align with the University of Missouri development program;
2. Support and enhance state and local priorities to benefit the residents of Missouri;
3. Build on a foundation of trust;
4. Recognize donors and volunteers;
5. Provide donors with multiple gift opportunities, both short- and long-term;
6. Be a collaborative effort with internal and external partners;
7. Focus on a local approach to securing gifts;
8. Fulfill fiscal and stewardship responsibilities;
9. Honor donors’ wishes with respect to their gifts; and
10. Support faculty, staff, volunteers and councils in fundraising efforts.
HISTORY OF GIVING IN EXTENSION

Early History

University of Missouri Extension started the Endowment and Gifts (E&G) program with the adoption of a statewide plan Feb. 1, 1984. The plan was developed using a consultant, John S. Ryan. The goal was to create a $10 million corpus of private monies to invest in extension programs. It was started during difficult economic times for the state and the University. It was hoped that endowment earnings would replace lost funds.

The focal point of the organization was the local endowment and gifts task force, which was accountable to the extension council in each county. An extension specialist was assigned to the task force. Each task force was to develop a plan of action to create an active, ongoing, private fundraising program. At the state level, an associate director was assigned leadership responsibility with two part-time regional coordinators assigned to work with area directors and local fundraising groups. Two statewide advisory groups were formed -- a Policy Council composed of program leaders, administration and foundation representatives, and an Advisory Board composed of citizens.

The statewide plan outlined action steps and tasks, such as organizational development, training, fundraising goals and methods, and relationships with other fund development entities within extension and the University.

The program started with an annual giving campaign for faculty and staff and county-level fundraising campaigns of their choosing. By 1990, 75 percent of the counties had established endowment accounts with additional accounts established by individuals to support programs or professional development. The early years resulted in a principal of $420,000 from 1,200 donors, which included $175,000 from the sale of a farm.

Since the inception of the program, more than 2,000 donors have contributed to the funds, including 20 current faculty and staff who contribute by payroll deduction. Total E&G program value as of August 2004 was $2,029,310. Among the successful campaigns in the early nineties, Henry County raised more than $100,000 to support a youth education assistant position; Grundy County raised more than $60,000 to support a second full-time professional position in the county; and Pettis County raised more than $80,000 for general operating support. In addition, a major donor in Clinton County began a named endowment to support home economics and youth-related programming.

Recent History

The Revenue Generation Plan was developed in October 2002 under the leadership of Julie Middleton. It included a five-year plan to reach targeted goals. A set of outcomes and action steps were identified. The plan called for:

- establishing an advisory board;
- hiring a Director of Development;
- establishing an infrastructure for supporting the development program;
• providing professional development for all involved;
• developing a case statement, marketing tools and a statewide plan for giving;
• developing campaign leadership by council members;
• creating a budget and communication plan;
• offering multiple ways of giving; and
• supporting a local approach to fund raising.

Actions steps, personnel responsible and timelines were clarified.

After this plan was approved, a smaller task force worked to begin to implement the plan. Shortly after this process began, announcement was made that extension would consolidate with the MU campus as of Jan. 1, 2004. Thus, the Revenue Generation task force discontinued its work until implications of the consolidation were clarified. Several from the Consolidation Implementation task force and from the original Revenue Generation Committee serve on the Consolidation Resource Development Work Group.
POLICIES AND PROCEDURES

Purpose

The purpose of the University of Missouri Extension Development Program is to provide opportunities for long-term, sustained giving to support extension programs. It is intended to complement and support local one-time, annual or recurring fundraising activities conducted by extension councils or by program entities, such as 4-H Councils, Master Gardeners, etc. The development program will provide local donors with additional gift opportunities and enhance and enrich their relationship with extension.

Organization

The operation of the University of Missouri Extension Development Program is a collaborative effort with the MU Development Office, Missouri 4-H Foundation, University of Missouri State Council, county extension councils and MU academic units. All aspects of the program will operate in accordance with University of Missouri policies and procedures. MU Development Office management systems will be used in all development efforts. Coordination of all extension development efforts will occur through the Extension Director of Development in collaboration with the Director of Organizational Development and others.

Responsibilities

Fund raising is a major activity of extension that is integrated throughout the organization. All faculty and staff have responsibilities that may directly or indirectly impact these activities. Examples include identifying donors and maintaining positive relationships with donors, conducting campaigns, marketing, implementing funded programs and providing donor reports. Responsibilities will be incorporated into the position descriptions of designated faculty and staff, based on the University of Missouri Extension Development Program plan. Council members and volunteers will play a major role in planning and conducting campaigns. All extension development activities will be coordinated through the Extension Director of Development.

Use of Funds

One hundred percent of funds will be used to fund priority programs in keeping with donors’ wishes. Program priorities will be established through collaboration with county extension councils. The University does not charge an administrative fee to administer gifts. Administrative and campaign costs are from other operating funds. Funds may be invested in an endowment or used for current expenditures.
Administration of Funds

The University of Missouri Investment and Banking Office will manage investments, and the MU Development Office will maintain donor records. The appropriate University department/unit or county extension council will be responsible for administering the funds in accordance with the terms and conditions of the gift and University policies and procedures.

Development Protocol

The Extension Director of Development will coordinate all extension development efforts in collaboration with the Director of Organizational Development and others.

Acceptance of Gifts

All gifts, regardless of whether they are administered by the University or by a county extension council, shall be accepted per University policies and procedures. County councils and extension faculty and staff may receive gifts to be accepted per University policy and procedure. Gifts should be forwarded to the Extension Director of Development to be processed.

Campaign Operations

Extension statewide and local fundraising campaigns will be conducted in accordance with University policies and procedures and in collaboration with University campaigns. All campaigns are voluntary and are coordinated with other MU campaigns, the Missouri 4-H Foundation, other local fundraising efforts of extension councils and other program entities. County extension councils may plan and conduct local campaigns through the University of Missouri Extension Development Program. Funds from these local campaigns will be invested and managed by the University. Expenditure of these funds will be guided by the University of Missouri Extension Development Program letter of agreement executed by the University and the council. This agreement will be signed prior to a campaign to state the purpose of the campaign and to define responsibilities and the use of funds raised (Appendix A).

Benefits for Local County Offices

County Extension Council participation in the University of Missouri Extension Development Program offers the benefits of a long-term, sustained giving program.

This program provides opportunities for donors to give in addition to current local opportunities, thus increasing the donor base and the fund raising potential for extension programs. Tax receipts are provided to the donors, and they are entered into a donor tracking system as a part of a statewide database for future access by the county. This system will allow extension to track all donations, coordinate gifts to avoid duplications, and manage gift reports by county, by fund or by donor. County clerical staff will be able to enter donor information into the system if desired. The University will also incorporate extension donations into their year end tax deduction statements. This will reduce the work load for local counties to meet IRS regulations.
All gifts are acknowledged by the University in writing. Thank you letters are sent by the University of Missouri Extension Development Office and the Director of Extension. This is in addition to any local thank you letters that are sent.

Funds may be given for immediate expenditure or designated for endowments, and are invested by the University of Missouri Investment and Banking Office. This office manages investments and provides reports to extension. In all cases, the Investment and Banking Office will seek to ensure the best return on the investments.

Those giving within this program may become members of the University of Missouri Jefferson Club or other donor recognition societies. This benefit may not be of interest to all, but it is an excellent opportunity for those who wish to participate.

Local Campaign Leadership Committees are provided with training on how to approach donors and how to ask for gifts. In addition, technical assistance with local campaigns will be provided as indicated in the Letter of Agreement. Technical assistance will also be provided to campaign leadership committees as they develop local campaign materials. The County Program Director (CPD) and/or other designated local faculty member(s), will assist the council and other volunteers with the campaign.

It is important to note that no fees are levied upon accounts for administrative purposes, and all funds are readily accessible to counties as set out in the letter of agreement.

Finally, local campaign leadership committees will benefit from models of fundraising that have been successful across the state.

**Campaign Support**

Councils, volunteers, faculty and staff will receive training in donor relations; organization and operation of fundraising efforts; marketing materials and support; access to current donor base; planning assistance; technical assistance; and consulting. The University and councils will develop an agreement on how campaign costs will be supported. Faculty and staff may be designated to provide major leadership and supporting roles. In these cases, appropriate changes in position and program responsibilities will be made temporarily so that these individuals can execute their fundraising responsibilities. Other support from the University may include hiring additional support staff and providing funds for professional development or program development.

**Donor Recognition**

Donors who meet the criteria are eligible to participate in appropriate University and extension donor recognition programs. Local campaigns also may establish recognition events and activities consistent with University policy.
Faculty and Staff Recognition

Faculty and staff are eligible to participate in the appropriate donor recognition program the same as any donor. In addition, extension will design appropriate award and recognition programs for their work in fund raising and development.

Volunteer Recognition

In addition to donor recognition opportunities, volunteers will be recognized for their work on fundraising activities.
INFRASTRUCTURE AND DATABASE

Key extension faculty, staff, volunteers and committee members will be recorded in the University’s Alumni Development database (Advance). All gift information for the University is already recorded in Advance. Advance will allow extension to track all donations, engage in major prospect management, and report on gift and donor activities according to geography, type of fund, or by donor. Access to the database will be determined by the role of each person involved in the fundraising process. County clerical staff will enter biographical data on a regional web form (Appendix B). All extension campus prospects and contacts will be coordinated through the Extension Director of Development. The Extension Director of Development will ensure that all donor records are maintained.
ORGANIZATIONAL STRUCTURE

The following chart identifies the organizational structure for the University of Missouri Extension Development Program. Key roles and responsibilities are described in the information that follows.

UNIVERSITY OF MISSOURI EXTENSION

ORGANIZATIONAL STRUCTURE FOR EXTENSION DEVELOPMENT

- VICE PROVOST for Extension
- ASSOCIATE VICE CHANCELLOR for Development & Alumni Relations
- Director of Organizational Development
- 4H Foundation & Campus Development Officers
- EXTENSION DIRECTOR OF DEVELOPMENT
- Administrative Assistant
ROLES AND RESPONSIBILITIES

Vice Provost and Director of Cooperative Extension

The Vice Provost and Director has overall responsibility for the operation and image of University of Missouri Extension. As such, the Vice Provost also is responsible for fundraising/development efforts. The Vice Provost provides personal visibility and support by making fundraising an organizational priority and by communicating the benefits of fundraising to internal and external audiences. The Vice Provost, in collaboration with the Associate Vice Chancellor of Development and Alumni Relations, directs and approves fundraising goals. The Vice Provost accompanies the Extension Director of Development on solicitation calls to potential major donors; emcees fundraising events; recognizes faculty, staff and volunteers who contribute significantly to fundraising goals; and keeps fundraising on the forefront of the organizational agenda.

Director of Organizational Development

The Director of Organizational Development works in collaboration with the Extension Director of Development.

The Director of Organizational Development, along with the Vice Provost for Extension, establishes and convenes a Statewide Citizens Development Council and the Resource Development Leadership Team. The Director of Organizational Development, working in concert with program directors, regional directors, and others in the organization, helps to identify program priorities.

Extension Director of Development

The Extension Director of Development, with supervision from the Associate Vice Chancellor for Development and Alumni Relations and the Vice Provost for Extension, will develop and implement the comprehensive action plan and maintain the infrastructure for fundraising. The Director works closely with the extension grants writer and cultivates relationships with foundations and other potential donors. All extension development efforts are coordinated through this office.

The Extension Director of Development is responsible for planned and annual giving efforts. The Extension Director of Development creates and maintains a database of donors, determines the best ways to approach prospective donors, and involves MU development officers, extension council members, community leaders and others in presenting giving opportunities to prospective donors.

The Extension Director of Development works in collaboration with the Resource Development Leadership Team; the Statewide Citizens Development Council; the University of Missouri Extension State Council; MU campus development officers; director of organizational development; regional directors; campus program directors; county program directors; county and regional extension councils; campus and off-campus faculty and staff; 4-H Foundation staff;
and volunteers. He or she will be supervised by the Associate Vice Chancellor for Development and Alumni Relations and the Vice Provost for Extension. A position description for the University of Missouri Extension Director of Development may be found in Appendix C.

**Associate Vice Chancellor for Development and Alumni Relations**

The Associate Vice Chancellor for Development and Alumni Relations, in concert with the Vice Provost for Extension, will provide day to day supervision of the Extension Director of Development. The Associate Vice Chancellor for Development and Alumni Relations will ensure that the Extension Director of Development has appropriate professional development to function within the MU development program and throughout the state.

**Grants Writer**

The Grants Writer will maintain a functional relationship with the Extension Director of Development to allow coordination of funding efforts within extension that stem from grants.

**Statewide Citizens Development Council (External Business/Community Leaders)**

The Statewide Citizens Development Council is the Vice Provost’s chief volunteer development board. The Director of Organizational Development assembles this statewide external board from business and community leaders and from county, regional and state extension council members across Missouri. Their terms of service are three years, subject to renewal for an additional three years. The Extension Director of Development is an ex-officio member of this council. The council members have the following functions:

- Establish fundraising priorities;
- Advise on policies related to fundraising;
- Identify donors and giving opportunities;
- Give leadership gifts;
- Identify and encourage funding of public/private/extension partnerships to support programmatic goals and benefit citizens;
- Provide statewide visibility for campaigns;
- Assist the Vice Provost and the Extension Director of Development by hosting events; providing media interviews; accompanying MU development officers on solicitation calls; and providing printing, design or other in-kind support.

**Resource Development Leadership Team (Internal Steering Committee)**

This internal group is comprised of the Director of Off-Campus Operations, a regional director, a program director, Executive Director of the 4-H Foundation, County Council Coordinator, campus and regional faculty, three to five representatives of local campaign committees, a retired extension faculty member and others as needed. The team receives input from the Statewide Citizens Development Council. Members’ terms of service are three years, subject to renewal for an additional three years. The Extension Director of Development is an ex-officio member of this steering committee. The group is convened by the Director of Organizational Development.
The role of the group is to:
- Guide Development Program policies and procedures;
- Make recommendations for development priorities;
- Establish short- and long-term monetary goals;
- Generate ideas for Development Program strategies;
- Encourage all extension faculty and staff to be active, participating members in the Development Program; and
- Serve on local campaign leadership committees as appropriate.

Local Campaign Leadership Committees

Led by a county extension council chair or other community volunteers with assistance from the County Program Director (or designee) and Development Program staff, the Local Campaign Leadership Committee carries out a campaign to assist in meeting local needs.

Reporting to the county extension council, the Local Campaign Leadership Committee is responsible for:
- Determining local fundraising needs and priorities in cooperation with the county extension council and extension faculty and staff;
- Making a lead gift to the campaign;
- Communicating fundraising benefits and opportunities to the local community;
- Identifying donor prospects;
- Contacting prospective donors and soliciting gifts;
- Tracking gifts in coordination with MU Development processes;
- Providing donor recognition;
- Publicizing campaign successes; and
- Evaluating opportunities for ongoing resource development.

The local campaign committee is supported in its efforts with assistance from the Extension Director of Development, the Director of Organizational Development and the other MU development officers. Campaign materials -- printed and electronic -- are produced in cooperation with the MU Development Office. The MU Development Office also provides procedures for receiving gifts, tracking and recording for tax purposes, and notifying donors.

Extension Councils

Council members play an integral part in planning and implementing local development efforts. The Development Program will be incorporated in the Council Leadership Development training modules so that all current and new council members can understand how the program benefits University of Missouri Extension programs and how members can be involved. Support and direction will be gleaned from the University of Missouri State Council.
The county extension council is responsible for:

- Relating to the University of Missouri Extension State Council;
- Creating a Local Leadership Committee, including members of the council, regional faculty members, community leaders, educational program participants and MU Extension supporters;
- Evaluating recommendations of the Local Campaign Leadership Committee and providing guidance and support;
- Developing a budget to support local fundraising efforts and events;
- Working with the Extension Director of Development to develop the fund agreement, called the letter of agreement;
- Working with the Development Office to secure marketing and fundraising materials;
- Maintaining communication with key supporters and stakeholders, including the regional director, county program director, county commissioners and others;
- Consistent with University policies and procedures, approving expenditure of funds raised for purposes identified in the local campaign and in accordance with donor wishes; and
- Serving as overall advocate for the Development Program.

Program Directors

The Program Director is responsible for statewide program leadership and establishing program priorities in their assigned area in collaboration with the Vice Provost and Director of Cooperative Extension and the Director of Organizational Development. Fund raising is a major responsibility and includes the following:

- Providing leadership for program needs assessment and program development;
- Helping to establish statewide program priorities;
- Providing information on programs, outcomes and case statements for development;
- Conducting fundraising activities per university policies and procedures;
- Administering program funds per university policies and procedures;
- Providing leadership for donor relations on the state level as appropriate;
- Participating in donor solicitation calls;
- Supporting marketing for fund raising;
- Providing leadership for faculty and staff involved in fundraising efforts;
- Assuring that donors receive feedback on program outcomes; and
- Keeping fundraising on the forefront of the program agenda.

The Program Director coordinates efforts with the Extension Director of Development, the Director of Organizational Development, regional directors, and appropriate faculty and staff. The program director should inform the Extension Director of Development when working with a development officer within the campus unit.
**Campus Faculty & Staff**

The campus faculty and staff are responsible for assisting program directors in supporting development efforts.

The campus faculty and staff will:
- Understand development program, giving options and benefits;
- Identify potential donors;
- Market Programs;
- Provide information, outcomes, case statements;
- Guide potential donors to proper access points;
- Support the efforts of the program directors;
- Inform the program director, the Extension Director of Development and the appropriate MU campus development officer of development efforts in which they are engaged.

**Regional Directors**

The Regional Director is responsible for program and administrative leadership within the region in collaboration with program directors and the Vice Provost and Director of Cooperative Extension. Fund raising is a major responsibility and includes the following:
- Leading program needs assessment;
- Coordinating program development;
- Establishing program priorities for development;
- Coordinating resource development campaigns per University policies and procedures;
- Ensuring that faculty and staff in their region have appropriate professional development for successful fundraising;
- Serving as a resource for local campaigns;
- Ensuring the proper management of council-administered funds;
- Providing leadership for donor relations and participating in donor solicitation calls;
- Supporting marketing of fundraising efforts;
- Supervising faculty and staff involved in local campaigns;
- Assuring that donors receive feedback on program outcomes; and
- Keeping fundraising on the forefront of the regional agenda.

The Regional Director coordinates these efforts with the Extension Director of Development, program directors, and appropriate faculty and staff.

**Regional Faculty and Staff**

Regional faculty and staff are the front-line communicators with citizens of Missouri and learners in University of Missouri Extension programs. Therefore, all regional faculty and staff develop a working knowledge of the Development Program and of giving options and benefits.

Each region identifies regional faculty and staff members who can aggressively and successfully incorporate giving activities into their extension role. Regional faculty and staff work together to identify potential donors.
Personal marketing is key to the success of the University of Missouri Extension Development Program. Faculty and staff receive training in the procedures and benefits of the program and develop sound understanding of the program so they can accurately guide potential donors to the proper access points.

**County Program Director or Designee**

The County Program Director, or regional faculty designee, coordinates regional faculty and staff development efforts with the University of Missouri Extension campus administration and the county extension council.

In counties where a local campaign is taking place, the CPD or designee will be assigned responsibilities to work with the campaign, and those responsibilities will be recognized in that person’s performance appraisal. The specific role will vary by county and is negotiated with the Regional Director.

**Orientation Leader & Orientation Coordinator**

The Orientation Leader and the Orientation Coordinator meet with new faculty on their first day. During that time, they ensure that new faculty learn about the Development Program. New faculty are informed of methods for giving to extension.
THE PILOT APPROACH

Counties and Program Directors will be given the opportunity to apply for pilot projects to support programs throughout the state in geographical and programmatic areas.

An application process will be instituted to select the pilot projects. Criteria for selection include:

- Current strength of local programs;
- Fundraising success (including in-kind gifts) in the past three to five years;
- Fundraising potential, including volunteer and in-kind support;
- Funding priorities; and
- Indications of interest and support for a local or targeted campaign.

In the case of a county proposal, regional directors in the proposed communities will submit proposals and the Resource Development Leadership Team will review proposals and make recommendations to the Director of Organizational Development and the Extension Director of Development. In the case of a program area, the program director will submit the proposal and the Resource Development Leadership team will make recommendations to the Director of Organizational Development and the Extension Director of Development on the selection. Final selection of the pilot communities and program area will be made by the Vice Provost’s Office.

Those involved in pilot efforts will be key in giving honest feedback to strengthen and enhance the statewide University of Missouri Extension Development Program.
CURRENT GIFT OPPORTUNITIES

Currently a number of opportunities exist for giving to University of Missouri Extension. Gifts to Extension are deductible to the extent allowed by law. The University of Missouri adheres to the principle that donors have the right to choose the designation of their gifts and have assurance that their gifts will credited to the project and fund they have chosen. Donor gift records are confidential to the extent allowed by law. Many opportunities for giving are described below.

Types of gifts

Cash

Checks should be payable to the University of Missouri-Columbia; donors can designate the project or fund in the memo line.

Pledges

The University encourages both short-term and long-term pledges. These gifts are recorded when a signed pledge form or similar document is executed between the donor and the University.

Securities

Stocks, Bonds and Mutual Funds may be donated to the University and may have some positive tax consequences associated with them.

Endowments

With gifts of at least $10,000, donors may create endowments for scholarships, faculty support, technology, extension projects, and other purposes. Donors have five years to complete the funding.

Real estate, tangible personal property and in-kind gifts

The MU Office of Gift Planning and Endowments will work closely with prospective donors interested in these types of gifts as these are subject to special IRS rules and University policies.

Planned Gifts

The University encourages donors to consider testamentary gifts/bequests, gift of life insurance, charitable remainder trusts, charitable lead trusts, charitable gift annuities and pooled income funds.

Bequests are one of the easiest forms of planned giving, but it must be worded correctly to ensure that the donor’s wishes are fulfilled.
Donors may name the University as the beneficiary of their retirement account. This gift option may provide significant income tax and estate tax benefits.

Permanent life insurance policies may be donated to the University. Donors will obtain the greatest tax benefits by naming the University of Missouri-Columbia as both the owner and beneficiary of the gifted policy.

Assistance for these types of gifts to MU is available from the Office of Gift Planning and Endowments.

There are numerous funds and endowment opportunities for giving already established to promote the mission of Extension throughout the state, and these are noted in appendix D.
DONOR RECOGNITION

Donors to Extension projects and funds may be eligible for membership in University gift clubs, such as the Jefferson Club (appendix E) and Legacy Society. These memberships may also offer dual membership in school and college gift clubs.
PROFESSIONAL DEVELOPMENT

Professional development is crucial if each stakeholder is to understand roles and responsibilities necessary to implement the statewide MU Extension Development Program. The Extension Director of Development and the Director of Organizational Development will support training efforts so that those participating in the University of Missouri Extension Development Program are prepared to participate in the program. Training will be practical, experiential and coordinated through the program director responsible for professional development. A train-the-trainer approach will be utilized with Regional Directors and other unit leaders. They will then assume leadership for providing appropriate professional development in their region.

Educational experiences will include:

1. Overview of the Development Program;
2. Roles and responsibilities of each stakeholder;
3. Goal setting and developing a fundraising plan;
4. Marketing extension programs;
5. Identifying, cultivating and soliciting funding prospects;
6. Types of gifts; and
7. Finalizing the gift.

Professional development will be administered within “like” groups at times, while other learning experiences will be held locally within operational campaign teams. Whenever possible, group training will be offered via technology to decrease travel funds.

Professional development will be designed for each group’s unique needs. Targeted programs for individual groups may include the following modules in addition to the topics above. The Extension Director of Development will provide support and assistance.

**Local Campaign Leadership Committee:**

*Leading a development effort*

**County Program Directors:**

*Working with council members and volunteers for a successful development program*

**Regional Directors:**

*Leading and supporting the University of Missouri Extension Development program*

**Program Directors:**

*Developing case statements*
*Marketing your program*

**Council Members:**

*Organizing for fund raising*
*Designing a fundraising campaign*
*Bringing new council members into the program*
**Administrative Associates to Regional Directors and County Secretaries:**

- Gift collection
- Using the database to input appropriate data (biographical data and potential donors)
- Maintaining local records

**Administrators:**

“Closing the Deal”

Professional development for the Director of Organizational Development and the Extension Director of Development will be gleaned through the Office of the Vice Chancellor for Development and Alumni Relations and through attendance at the quarterly Council for Institutional Relations meetings. Additional sources will include local, state and national conferences.
The following budget estimates funds needed to support the Development Program.

**Annual Expenses**

Personnel
- Development Director: $55,000 - $60,000
- Administrative Assistant: $25,000 - $26,000
- Benefits: $23,000 - $28,000

Total: $103,000 - $114,000

Gift accounting, publication design and writing, external and media relations, event planning and execution, both on and off-campus, and marketing efforts will be conducted by other extension staff.

- Travel – 50% minimum required: $9,000
- Postage: $500
- Telephone: $1,250
- Photocopies: $500
- Printing: $4,000
- Supplies: $1,700
- Dues: $250
- Professional Development (CASE): $2,500
- Development Events – attending: $1,000
- Development/Volunteer Events – hosting: $2,000

Marketing, Design & Publications
- $30,000

Total: $52,700

**Estimated Annual Total**: $155,700 - $166,700, not including events

**Campaign Expenses** – Three years’ budget in addition to above

If the goal is to keep fundraising costs at 10 cents on the dollar, or less, then it would take around $100,000 to raise $1 million, depending on methods used, and the campaign’s goals and objectives. The more gifts that are received at the $100,000 level and above, the more the cost per dollar goes down.

<table>
<thead>
<tr>
<th>Case Statement Brochure</th>
<th>$4,000</th>
<th>8,000</th>
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<tbody>
<tr>
<td>Campaign Folder</td>
<td>$3,450</td>
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<tr>
<td>Campaign Brochure</td>
<td>$14,000 - $20,000</td>
<td>8,000</td>
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<tr>
<td>Envelopes</td>
<td>$2,200</td>
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</tr>
<tr>
<td>Postage</td>
<td>$5,000</td>
<td>2,250</td>
</tr>
<tr>
<td>Insets (Naming Opportunities, Ways of Giving, Priorities, etc.)</td>
<td>$3,000</td>
<td>8,000</td>
</tr>
</tbody>
</table>
Quarterly Newsletter $ 4,000  8,000  
Campaign Video $ 8,000 - $15,000  
Travel Photographers/Writers $ 2,000  
Gift Announcements $ 1,000  
Leadership Committee Expenses $ 1,200  (based on 2 meetings annually for 30 persons @$20 per meal)  
Leadership Committee Materials $ 1,125  (based on 2 meetings annually for 30)  
Travel $ 5,000  
Kickoff/Announcement Events $ 1,000  
$54,975 - $67,975  (does not include events)

**Combined Costs**

- Annual development operating budget $155,700 - $166,700  
- *Annualized* campaign budget (based on three years) $ 18,325 - $ 22,658  
  $174,025 - $189,358
COMMUNICATION PLAN

Consistent, ongoing communication with internal and external audiences will be essential to the success of the Development Program.

Internal Audiences

Audiences internal to University of Missouri Extension include regional and campus faculty and staff; county, regional and state extension council members; extension retirees; other closely tied volunteers, such as 4-H Foundation board members; and current Endowment and Gifts or Ratchford fund donors.

Existing channels of communication, which can be employed to relate goals, plans and achievements include the electronic Weekly News, which goes to all extension faculty and staff; Life After Extension, a biannual publication for retirees; letters from the extension Vice Provost’s office; regional and campus faculty meetings; administrative meetings, such as the Program Leadership Council and Extension Academic Council; and e-mail and mail from program directors and regional directors to faculty and staff.

It is advisable to create new Web pages specifically to inform internal audiences, motivate involvement and document progress. Web pages for external audiences, linked to online ways to give, including giving by credit card, also will be helpful. The MU Development Office has resources to help build Web sites and also “e-mail blaster” tools to direct messages to target groups.

Elements of Internal Communication

Extension development communications will be coordinated through the Vice Provost’s office. Among the items to be shared are:

- Guiding principles
- Relationship of fundraising activities to strategic plans and mission of the University and University of Missouri Extension
- Recommendations of the Statewide Citizens Development Council and the Resource Development Leadership Team
- Plans for implementation, including roles and benefits for all expected to participate
- Fundraising benchmarks, goals and progress
- Giving options
- Success stories, including use of new funds
- Opportunities for professional development
- Opportunities for input and feedback to improve the processes.

External Audiences

Prime external audiences crucial to success of development efforts are current donors; prospective donors; funders (county commissioners, legislators, United Way, Kauffman
Foundation, grant and contract partners); program partners (state agencies, Chambers of Commerce, community groups); program recipients; and the general public.

Specific marketing/communication messages and tools will be created in conjunction with the MU Development Office, the Statewide Citizens Development Council and the Resource Development Leadership Team to target specific audiences. Since fundraising communication is a very specialized field, University of Missouri Extension will rely on the proven fundraising experience of the MU Development Office to assist with these pieces. Communications pieces for pilot communities initiating campaigns include case statements, informational flyer or brochure, pledge card, Web site and impact statements.

In addition to these targeted communications, ongoing communications channels can be used to carry messages of support for campaigns in the pilot communities. These ongoing media include newsletters and other publications produced by faculty on campus and in the field; county, regional and campus Web sites; newspaper columns and news articles; and radio interviews.

University of Missouri Extension’s vast people network will be employed to relay pertinent messages. County extension council members, 4-H volunteers, program advisory councils, local clientele mailing lists, volunteer fire fighters and participants of MU Extension’s online learning classes are among the groups to whom and through whom communication about giving opportunities should flow.

External Messages

According to findings of an earlier fundraising feasibility study and preliminary discussion with the University of Missouri Extension marketing work group, key messages to emphasize with external audiences are:

- University of Missouri Extension is a source for credible, unbiased, research-based information.
- Extension is a problem-solver; it exists to help you (individuals and communities) find real solutions to real problems and to improve your quality of life.
- Extension is efficient, accountable and accessible.
- Extension is more than you may know (not just rural, not just agriculture and 4-H, but relevant to business, environmental quality, parenting and a resource for all phases of your life).
- Extension is a partner with public/private entities to enhance economic development across the state.
- Your financial support will enable you to be a partner with University of Missouri Extension to achieve worthwhile things in your community that you want to achieve.

Adjectives we would like to have people ascribe to University of Missouri Extension include:

- Friendly
- Reliable
- Relevant
- Up-to-date
- Practical
• Dynamic
• Accessible
• Responsive
• Leader.

Messages always should keep in mind WIIFM: What’s In It For Me?
SUMMARY

The University of Missouri Extension Development Program is outlined in this plan. It is guided by a set of guiding principles and polices and procedures as described herein. The organizational structure is described and the infrastructure to support the program is outlined. Roles and responsibilities of each person or group involved in the program are described in this document.

A pilot approach will be utilized to begin the program and to learn ways for strengthening resource development. This plan also describes current gift opportunities, donor recognition and professional development that will be made available to prepare those who will participate in the development program. An estimated budget is included, as well as a detailed communications plan for internal and external audiences. A summary of actions and list of personnel responsible follow for quick reference.

Upon approval by current administrators, this plan will be fully implemented. A supportive web site will be developed so that all within the extension family will have ready access to the plan. Questions about this plan should be directed to the Director of Organizational Development at 828 Clark Hall.
### SUMMARY OF KEY ACTIONS AND PERSONNEL RESPONSIBLE

<table>
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<tr>
<th>Recommendation</th>
<th>Who</th>
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<tbody>
<tr>
<td>1. Develop donor database from past 5 years of giving in extension</td>
<td>MU Development Office</td>
</tr>
<tr>
<td>2. Approve Development Program Consolidation</td>
<td>Director of Cooperative Extension and MU Development Office</td>
</tr>
<tr>
<td>3. Develop list of priority program for future funds</td>
<td>Director of Organizational Development &amp; Program Directors</td>
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<tr>
<td>4. Develop case statements &amp; marketing materials</td>
<td>Program Directors with Marketing &amp; MU Development Office</td>
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<tr>
<td>5. Hire a Director of Development and support staff</td>
<td>Associate Vice Chancellor of Development and Alumni Relations and Vice Provost of Extension</td>
</tr>
<tr>
<td>6. Appoint Resource Development Leadership Team &amp; Statewide Citizens Development Council</td>
<td>Director of Extension with leadership from the Director of Organizational Development</td>
</tr>
<tr>
<td>7. Select and train council members and teams in pilot locations</td>
<td>County Leadership Development Committee (CLDC) &amp; Extension Director of Development in collaboration with Director of Organizational Development</td>
</tr>
<tr>
<td>8. Institute pilot programs in 5 counties</td>
<td>Extension Director of Development &amp; Director of Organizational Development</td>
</tr>
<tr>
<td>9. Develop model for future campaigns</td>
<td>Director of Development</td>
</tr>
</tbody>
</table>
MU Extension Consolidation
Development Program

APPENDICES

Appendix A: Letter of Agreement

Appendix B: Fields to use in Extension’s Regional Web Entry Form

Appendix C: Position Description of Extension Director of Development

Appendix D: University of Missouri Extension Summary of Endowment and Gift Accounts

Appendix E: Jefferson Club
Appendix A

Letter of Agreement - University of Missouri Extension Development Program

This document will serve as an outline for a letter of agreement between University of Missouri Extension and a County Extension Council to operate a local campaign. This letter is in addition to the agreement to establish an account in the MU Development Office.

I. Purpose of the Campaign

II. Use of Funds Raised

III. Describe the process that will be undertaken. How will donor relations be established and maintained?

IV. Procedure for Receiving Gifts

V. In the operation of the campaign and management of funds, the council will:
   1. Comply with University policies and procedures.
   2. Coordinate and collaborate with Extension Development Program in the operation of the campaign and in donor relations.

VI. In the operation of the campaign and management of funds, the University will:
   1. Accept the gift and maintain donor records and recognition.
   2. Manage investments.
   3. Provide training and support in the planning and operation of the campaign.

VII. Relationship with Existing Campaigns

VIII. Budget

IX. Signature of County Extension Council Chair and Vice Provost/Director
Appendix B

University of Missouri Extension’s Regional Web Entry Form

This form is to be completed by county secretaries or other person designated by the regional director and county council.

These fields are required to enter the minimal information needed to set up an individual in the Advance database.

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<td>MU alumni</td>
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The following fields are not required but recommended to be part of the information recorded.

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</tr>
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<td>Bus phone</td>
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Program Affiliation: Check all that apply:

__ 4-H Youth Development  __ Business Development
__ Ag and Natural Resources __ Human Environmental Sciences
__Community Development  (parenting, nutrition, etc.)
CLASSIFICATION SPECIFICATION

CLASS TITLE: DIRECTOR OF DEVELOPMENT - EXTENSION
SUPERSEDES: CODE: 3284
ISSUED: 01/2005

BASIC FUNCTION AND RESPONSIBILITY

Function as a major gift fund raiser for University of Missouri Extension, in conjunction with the Office of Vice Chancellor for Development and Alumni Relations. This will include soliciting and closing major gifts (six figure and above) from individuals, corporations, and foundations, and annual fund coordination with the University development staff. The Director of Development will oversee the Extension Development program and coordinate all extension fund-raising efforts.

CHARACTERISTIC DUTIES

Identify prospective individual, corporate and foundation donors and initiate appropriate personal cultivation, solicitation and stewardship activities, requiring a minimum number of prospect proposals, travel and a significant number of personal visits. In coordination with the Vice Provost for Extension, the Director of Organizational Development and the Program Directors, and Steering Committees, identify funding needs and priorities for approval at the institutional level.

Develop and implement, under the supervision of the Vice Provost and Director of Cooperative Extension and the Vice Chancellor for Development and Alumni Relations, the goals for the office and an annual operating plan with monthly and quarterly activity and monetary goals.

Develop and administer budget for fund-raising program.

Recruit and staff volunteer structures for the Extension Development program. Collaborate with Alumni Relations Directors, Council members, faculty and staff, Grant Writers, Program Directors, Regional Directors, County Program Directors, the Director of Organizational Development, and others to achieve goals of the Extension Development program.

Support local fund raising efforts and activities across the state.

Serve as Ex-Officio member of the Statewide Citizens Development Council and the Resource Development Leadership Team.

Recruit, train, and supervise development officer(s) who are appointed to Extension.

Communicate with donors about their institutional gifts and their uses.
Draft and complete case statements, solicitation appeals and accompanying letters and materials for use in fund raising.

Assist with other development projects across the campus and state as needed.

Attend regularly scheduled development meetings and program leadership committee meetings as appropriate.

Participate in prospect strategy meetings.

Participate in and support the prospect management system.

**SUPERVISION RECEIVED**

The Director of Development has a reporting relationship to the Vice Provost and Director of Cooperative Extension and the Vice Chancellor for Development and Alumni Relations.

**SUPERVISION EXERCISED**

Administrative and functional supervision may be exercised over one or more development officers, office support staff and numerous part-time volunteer support staff.

**QUALIFICATIONS**

A Bachelor’s degree in Business Administration, Marketing, Public Relations or related area or equivalent combination of education and experience from which comparable knowledge and abilities can be acquired is necessary. A Master’s degree is preferred.

Three to five years progressively responsible fund raising and/or alumni volunteer relations management, preferably in a development office setting.

Proven successful track record of soliciting and closing major gifts (six figures and above).

Must have broad understanding of multifaceted campaign planning, implementation and management.

Knowledge of land grant systems and experience working in extension settings is preferred.

Fund-raising experience in a large university setting is preferred.

Must have excellent interpersonal, organizational and writing skills.

Must be able to work independently and manage multiple projects simultaneously.

Supervisory and leadership experience is desirable.
Missouri Cooperative Extension Service Endowment & Gifts Fund
Endowment fund to expand and enrich the quality of educational services offered by the Missouri Cooperative Extension Service. Use of income is recommended by the Vice Provost for University of Missouri Extension.

C. Brice Ratchford Endowment Fund
Recognizes a University of Missouri faculty member who demonstrates commitment, dedication and effectiveness in advancing the land-grant mission through extension, international education and agriculture economics programs. Recipients are named by the Board of Curators with recommendation of the UM President. The President is advised by a panel of representatives of the UM campuses, off-campus faculty and Missouri citizens, chaired by the Director of Extension.

University Extension Economic/Community Development Fund
Endowment fund to expand and enrich the quality of the University of Missouri Extension Economic/Community Development programs. Use of income is authorized by the Vice Provost for Extension or a committee or persons authorized to act on behalf of the Vice Provost.

UMEA Professional Communicator Award Endowment
Expands and enriches University of Missouri Extension field faculty’s ability to communicate by rewarding outstanding multimedia work and by providing funds to purchase communications equipment and material in the awardee’s name for local use. Allocations may be made to any University of Missouri Extension field faculty member excelling in a multimedia communications effort. Use of income is recommended by the UMEA board.

Wayne L. Atkins University of Missouri Extension Middle Managers Professional Improvement Endowment
Supports the continued professional improvement of those in University of Missouri Extension middle management positions with emphasis on those having responsibility for field faculty supervision. Earnings from this fund may be used to support professional development activities for middle managers or selected individuals to develop or secure professional development materials. Use of income is recommended by the Vice Provost.
Ruth Lee Flory Endowment

Expands and enriches the quality of educational services offered by the University of Missouri Extension Home Economics Program. The fund is specifically for the development of nutrition education resources for infants, children and young adults, excluding salaries, mileage and other administrative costs or overhead. Use of income is recommended by the Vice Provost.

Mary Nell Greenwood Memorial Endowment

Enables current and future University of Missouri Extension professionals to continue to design high-quality programs and dedicate themselves in service to the citizens of Missouri. Use of income is recommended by the Vice Provost.

Stirling Kyd Memorial Endowment

Expands and enriches the quality of educational services offered by University of Missouri Extension. Use of income is recommended by the Vice Provost. Mrs. Kyd advises as to use of funds.

J.U. Morris Memorial Endowment

Supports various University of Missouri Extension programs. Use of income is recommended by the Vice Provost.

The Foy Cleveland Real and Helen Logan Real Endowment

Enables the University of Missouri through extension to help youth and young adults, primarily in rural areas, cope with the problems they face. Emphasis is on efforts that would not normally be available in the absence of outside funding. Ten percent of the annual income is made available to the Vernon County Extension Council to be used in Vernon County for the same purposes. Use of income is determined by the Vice Provost.

Carl N. Scheneman Excellence in Teaching Award

Provides awards for excellence in teaching for University of Missouri Extension faculty members. The award may be in the form of a plaque with the name of the recipient. When the fund is of sufficient size, a monetary award also may be made from the fund. The amount of the monetary award is determined annually by the Vice Provost in accordance with the investment procedures of the fund. A committee of professional extension staff members appointed for the above purpose by the Vice Provost recommends finalists for the award. The Vice Provost for Extension selects the final recipient(s) of the award.
R.R. Thomasson Endowment
Assists University of Missouri Extension staff and faculty with development and implementation of programs of benefit to the people of Missouri. An annual monetary grant may be made to selected staff members based on criteria established by a committee appointed for such a purpose by the Vice Provost.

Missouri Extension Loan and Fellowship Fund
Awards fellowships to extension staff to use in professional improvement or graduate study. Fellowships are awarded by the Vice Provost on recommendation of the Extension Fellowship and Awards Committee.

J.W. Burch Loan and Fellowship
Provides educational loans to professional employees of University of Missouri Extension and to UM-Columbia students (preference to Animal Husbandry). Any earnings are to be used to fund professional improvement fellowships for professional extension employees.

Charles A. Stacey and Robert L. Vickery Extension Endowment
Benefits University of Missouri Extension programs. Use of income is recommended by the Vice Provost.

Dr. Ronald J. Turner Endowment Fund
Provides support for global education opportunities for extension faculty and staff. Use of income is recommended by the Vice Provost.

COUNTY-SPECIFIC FUNDS

Willis E. Davis Memorial Endowment
Benefits the University of Missouri Extension Council of Butler County. Use of income is recommended by the University of Missouri Extension Council of Butler County.

The Harvey S. and Hattie I. Martin Endowment
Provides funds for University of Missouri Extension Council of Lincoln County in support of projects and programs of the council. Use of income is recommended by the University of Missouri Extension Council of Lincoln County.
The Real-Vernon County Endowment

Enables the University of Missouri through extension to help youth and young adults, primarily in rural areas, cope with the problems they face. Emphasis is on efforts that would not normally be available in the absence of outside funding. Funding of the Real-Vernon County Account is the automatic deposit of 10 percent of the annual income from the Foy Cleveland Real and Helen Logan Real Endowment. Use of this 10 percent is recommended by the University of Missouri Extension Council of Vernon County.

Louie and Thelma Van Buren Endowment

Supports the Human Environmental Sciences Extension position and/or the Youth Specialist position of the Clinton County Extension Council. Distribution from the corpus shall be in addition to what the University contributes to the Clinton council, and shall not be in replacement of the University contribution to the Clinton council in support of the Human Environmental Sciences Extension position and/or the Youth Specialist position for that council. Expenditures are approved by the Vice Provost or designee.

Worth County Program Support

Not an endowment, but an invested amount that resulted from a period of years when the Hundley-Whaley Research Farm was managed through the Worth County Extension Council. By written agreement, use of funds must be initiated by the council and approved by the Vice Provost.

Counties with Endowment Funds:

Appendix E:

Jefferson Club

As the first state university in the Louisiana Purchase territory, the University of Missouri-Columbia has, from its beginnings, felt historic and philosophic ties with Thomas Jefferson. Jefferson’s commitment to the quality of public higher education makes it appropriate that alumni and friends who are dedicated to high-quality education at the University of Missouri be banded together in a Jefferson Club.

The purpose of the Jefferson Club is to assist MU in achieving its fundraising goals by encouraging more substantial private giving to the University at the minimum level of $25,000 for sustaining members. The Jefferson Club also recognizes and serves its members with special events and services:

- All members receive invitations to special campus and regional Jefferson Club events.
- Jefferson Club members are recognized in University honor rolls, and members enjoy newsletters and publications prepared especially for them. Members also will be recognized in extension and individual school/college publications.
- Annual and sustaining members receive a Jefferson Club lapel pin. Sustaining members’ pins are identified by the following gemstones:
  - Member — amethyst
  - Fellow — citron
  - Distinguished Fellow — sapphire
  - Very Distinguished Fellow — ruby
  - Diplomat — emerald
  - Ambassador — diamond
- Sustaining members are presented with a Jefferson Club plate, which symbolizes the legacy made possible by their gift commitments.

Sustaining Members

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<tr>
<td>Fellow</td>
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<td>$100,000</td>
</tr>
<tr>
<td>Distinguished Fellow</td>
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<tr>
<td>Very Distinguished Fellow</td>
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<tr>
<td>Diplomat</td>
<td>$500,000</td>
<td>$1 million</td>
</tr>
<tr>
<td>Ambassador</td>
<td>$1 million</td>
<td>$2 million</td>
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</table>
Six levels of sustaining membership are available to individuals who meet one or more of the following criteria:

- Contribute or pledge one of the amounts listed, over no more than a 10-year period;
- All prior gifts to the University of Missouri-Columbia, and company matching gifts, count toward membership;
- Irrevocable trusts are included as an outright gift or pledge gift.

*Testamentary gifts signify the intention to donate by means of a bequest, life insurance or other type of deferred gift.

**Annual Members**
Annual Members contribute gifts of at least $1,000 and are recognized in the current and following calendar years. All annual membership contributions count toward sustaining membership requirements.

**Faculty and Staff Membership**
MU and extension faculty and staff who are MU benefit-eligible may join as annual or sustaining members.

**Other Memberships with School, College and Program Gift Clubs**
Extension Jefferson Club members also may enjoy membership in other MU school, college or program gift clubs. Options include:

- The College of Agriculture, Food & Natural Resources Monticello Society;
- The College of Human and Environmental Sciences Vanguard Society;
- The Legacy Society honoring donors who have provided gifts to the University through a variety of estate-planning methods, such as bequests in a will or trust.