

CCAC Strategic Plan

DEVELOPMENT

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Cadet Corps Alumni Council
Strategic Plan for Development
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Executive Introduction

The Cadet Corps Alumni Council (CCAC) Development Strategy is built on a structured Lines of Effort (LOE) framework designed to expand the financial, material, institutional, and strategic resources available to support the Maverick Battalion, its cadets, alumni, programs, and long-term mission.

Development is broader than fundraising. It is a relationship-based system that connects alumni, individuals, families, companies, foundations, educational institutions, community organizations, and other partners to the mission, impact, and legacy of CCAC. Effective Development requires a clear case for support, well-defined opportunities for participation, intentional relationship building, disciplined cultivation and solicitation, meaningful recognition and stewardship, and continuous assessment of results.

Development support may take multiple forms. Financial support includes scheduled or ongoing **Giving**, individual unscheduled **Donations**, sponsorships, grants, major gifts, and legacy gifts. Development also includes in-kind support, shared-use arrangements, access to facilities and services, institutional cooperation, professional expertise, and other relationships that increase CCAC's ability to accomplish its mission.

The Development Strategy is designed to function as a complete resource-development lifecycle. It identifies why individuals and organizations should support CCAC, creates structured opportunities for alumni and other supporters to participate, develops corporate and institutional partnerships, pursues grants and foundations, cultivates major and legacy gifts, leverages trusted relationships, stewards supporters, and measures Development performance over time.

Development operates in coordination with the other CCAC functional areas. Development owns the supporter relationship, case for support, resource opportunity, cultivation strategy, and solicitation process. Finance maintains responsibility for the custody, accounting, control, budgeting, reconciliation, and authoritative financial reporting of financial resources. Communications and Marketing support Development by communicating and promoting approved Development messages, opportunities, and campaigns. Membership and Development coordinate closely where alumni membership

and Alumni Development programs intersect while preserving the distinct purposes of Membership and Development.

The Full System

Stage	LOE	Strategic Question
WHY SUPPORT	LOE 1	Why should individuals and organizations support CCAC?
ALUMNI SUPPORT	LOE 2	How do we develop sustained financial and legacy support from Maverick Battalion alumni?
COMMUNITY SUPPORT	LOE 3	How do we engage individuals, families, and community supporters beyond the alumni population?
CORPORATE SUPPORT	LOE 4	How do we develop mutually beneficial relationships with companies and businesses?
INSTITUTIONAL SUPPORT	LOE 5	How do we develop institutional partnerships, grants, foundation support, and shared resources?
TRANSFORMATIONAL SUPPORT	LOE 6	Who can make a major or legacy-level contribution to CCAC's mission?
WHO OPENS DOORS	LOE 7	Who can introduce CCAC to donors, sponsors, grantors, institutions, and partners?
WHY THEY CONTINUE	LOE 8	Why do donors, sponsors, and partners remain engaged with CCAC?
HOW WE MEASURE	LOE 9	How do we track, assess, and improve Development performance?

The Development Growth Lifecycle

1. **Define the case** — LOE 1: Development Identity and Case for Support
2. **Develop alumni support** — LOE 2: Alumni Development
3. **Expand individual and community support** — LOE 3: Individual, Family, and Community Development
4. **Build corporate partnerships** — LOE 4: Corporate Sponsorship and Partnership Development
5. **Build institutional and grant support** — LOE 5: Institutional Partnerships, Grants, and Foundations

- 6. **Cultivate transformational support** — LOE 6: Major Gifts and Legacy Giving
- 7. **Leverage relationships** — LOE 7: Relationship-Based Development Outreach
- 8. **Steward and retain supporters** — LOE 8: Donor and Partner Stewardship, Recognition, and Retention
- 9. **Track and improve performance** — LOE 9: Development Tracking, Reporting, and Optimization

Define > Identify > Engage > Cultivate > Offer > Secure > Steward > Retain > Expand

Strategic Insight

The strength of this framework is that it treats Development as a complete system rather than a series of isolated fundraising activities. A compelling case for support without clear opportunities for participation does not generate sustained support. Programs without deliberate relationship building become transactional. Corporate or institutional outreach without mutual value is difficult to sustain. Major gifts rarely result from mass solicitation alone. Supporters who are not thanked, informed, recognized, and shown the impact of their participation are less likely to remain engaged.

Development must also create value beyond direct financial contributions. A corporate partner may provide equipment, services, employment opportunities, expertise, or event support. A university or institutional partner may provide access to facilities, programs, networks, or shared resources. A foundation may fund a specific initiative. An alumnus may begin with annual Giving and later make a major or legacy gift. Each relationship can contribute to CCAC's organizational capacity in a different way.

By aligning all nine LOEs, CCAC can create a repeatable Development system that explains why support matters, provides clear pathways for participation, develops diverse sources of resources, leverages trusted relationships, cultivates transformational opportunities, maintains supporter trust, and continuously improves Development performance.

Development must remain closely integrated with Membership, Finance, Communications, and Marketing without assuming their functional responsibilities. The resulting system should allow each functional area to reinforce the others while maintaining clear accountability and authority.

Purpose of This Plan

This plan provides CCAC leadership with a practical strategic framework for Development. It translates broad resource-development goals into organized Lines of Effort that can be assigned, tracked, measured, and refined over time.

The plan establishes a coordinated system for Alumni Development, individual and community support, corporate sponsorship and partnerships, institutional relationships, grants and foundations, major and legacy gifts, relationship-based outreach, supporter stewardship, and Development performance management.

It is designed to increase CCAC's organizational capacity while maintaining clear functional coordination with Membership, Finance, Communications, Marketing, Military Science, UTA, other colleges and universities associated with the ROTC program, and appropriate external partners.

Desired End State

The desired end state is a diversified, sustainable, and relationship-driven Development system that consistently generates financial, material, institutional, and strategic resources in support of CCAC and the Maverick Battalion.

CCAC maintains active and productive relationships with alumni, individual supporters, families, companies, foundations, educational institutions, community organizations, and other mission-aligned partners. The Patriot Program provides an established annual Giving pathway for alumni and supporters; the Brick Program provides an approved and sustainable legacy and recognition opportunity once developed; corporate and institutional partnerships provide financial and non-financial value; grants and foundations expand program capacity; and a disciplined major-gifts program creates opportunities for transformational support.

Development activities are coordinated with Finance so that financial resources are properly received, controlled, accounted for, and reported, while Development maintains responsibility for supporter relationships, cultivation, stewardship, and resource-generation strategy.

The Development system is structured so measurable targets for participation, revenue, donor retention, partnerships, grants, major gifts, and other performance indicators can be established and adjusted as CCAC develops organizational capacity and experience.

Strategic Planning Structure

The plan is organized using a clear and scalable hierarchy that translates strategic intent into executable actions and measurable outcomes. Each Line of Effort (LOE) is structured to move from purpose, to action, to execution support, and ultimately to a defined result.

Line of Effort - A Line of Effort (LOE) is a major area of coordinated activity that contributes to achieving the overall strategic goal. Each LOE organizes related objectives, tasks, and resources around a specific strategic function and provides a logical pathway from current conditions to the desired end state.

Operational Objective - The Operational Objective defines the purpose of the LOE and the desired condition if it is successfully achieved. It provides direction, establishes focus, and aligns all supporting actions toward a clearly defined outcome.

Key Tasks - Key Tasks are the primary actions required to achieve the Operational Objective. They define what must be accomplished at the operational level and establish the major areas of activity within each LOE.

Supporting Tasks - Supporting Tasks describe how each Key Task will be executed. They break down broader actions into specific, actionable steps that can be assigned, tracked, and completed.

Enabling Resources - Enabling Resources identify the people, systems, tools, information, and relationships required to execute Supporting Tasks. They highlight what must be available to ensure successful execution.

LOE Effect - The LOE Effect defines the measurable outcome produced when the Operational Objective is achieved. It captures the impact of the LOE and explains how it contributes to the overall Development system and long-term organizational success.

End State - The End State defines the sustained condition that should exist when the LOE has been successfully completed. It describes what success ultimately looks like, incorporates the cumulative results of the LOE, and establishes the condition that must be achieved for the LOE to be considered successful.

Example Structure

LOE 2 — Alumni Development

Operational Objective

Establish a comprehensive Alumni Development system that converts alumni affinity for the Maverick Battalion into sustained financial and legacy support through structured Giving opportunities, individual Donations, recognition programs, and long-term donor engagement.

End State

CCAC maintains a structured and sustainable Alumni Development program that provides Maverick Battalion alumni clear opportunities to support the organization beyond membership, produces recurring annual Giving through the Patriot Program, provides appropriate pathways for individual Donations, establishes an approved Brick Program for permanent recognition and legacy participation, identifies alumni capable of increased or major support, and maintains long-term relationships with alumni donors.

Key Tasks

1. Key Task 1 - Administer and Grow the Patriot Program

- 1.1 Supporting Task
 - Enabling Resource

2. Key Task 2 - Develop and Implement the Brick Program

- 2.1 Supporting Task
 - Enabling Resource

3. Key Task 3 - Establish Alumni Giving and Donation Pathways

4. Key Task 4 - Develop Alumni Donor Progression

5. Key Task 5 - Coordinate Alumni Development with Membership and Other Functional Areas

LOE Effect

A comprehensive Alumni Development system that provides Maverick Battalion alumni clear and meaningful opportunities to financially support CCAC, establishes recurring annual Giving through the Patriot Program, creates individual Donation and legacy opportunities, strengthens donor relationships, and provides a deliberate pathway from initial participation to sustained and potentially transformational support.

LOE 1 — Development Identity and Case for Support

Operational Objective

Develop and maintain a clear, compelling, and consistent Development identity and case for support that explains why individuals and organizations should support CCAC, how their support advances the mission, and what financial, material, institutional, and strategic impact their participation creates for cadets, alumni, and the Maverick Battalion.

End State

CCAC maintains a clearly articulated and consistently used case for support that allows leaders, Development personnel, alumni, volunteers, and partners to explain why support matters, distinguish among Giving, Donations, sponsorships, grants, major gifts, and other forms of support, and present appropriate opportunities to each stakeholder group. The Development message is integrated with Membership, Marketing, Communications, and Finance without duplicating or conflicting with those functional areas.

Key Tasks

1. Key Task 1 - Define the Core Development Case for Support

- 1.1 Explain why CCAC requires Development support
 - Support cadet leadership development and appropriate cadet programs.
 - Strengthen alumni engagement and community building.
 - Support events, recognition, historical preservation, and organizational initiatives.
 - Increase CCAC's capacity to accomplish its mission over the long term.
- 1.2 Connect Development support to mission impact
 - Explain who benefits from the support.
 - Explain what the support enables CCAC to accomplish.
 - Connect support to measurable or observable outcomes whenever possible.
 - Reinforce preservation and advancement of the Maverick Battalion legacy.
- 1.3 Define the emotional and practical reasons to support CCAC
 - Legacy.
 - Belonging and continued connection.
 - Cadet development.
 - Leadership development.

- Historical preservation.
- Service to future generations.
- Organizational sustainability.
- 1.4 Develop concise Development messages for different settings
 - Website and digital content.
 - Personal conversations.
 - Giving and Donation appeals.
 - Sponsorship discussions.
 - Grant and foundation applications.
 - Major gift conversations.
 - Event remarks and printed materials.

2. Key Task 2 - Define Development Value Propositions by Stakeholder Group

- 2.1 Define the value proposition for Maverick Battalion alumni
 - Continued connection to the Battalion and fellow alumni.
 - Opportunity to support cadets and future generations.
 - Participation in the Patriot Program and other approved Alumni Development opportunities.
 - Legacy and recognition opportunities.
- 2.2 Define the value proposition for individuals, families, and community supporters
 - Support for leadership development and cadet success.
 - Connection to military, veteran, educational, or community interests.
 - Memorial, honorary, or mission-specific opportunities.
- 2.3 Define the value proposition for companies and businesses
 - Mission alignment.
 - Brand visibility.
 - Recruiting and professional-networking opportunities when appropriate.
 - Association with military service, veterans, leadership, and education.
 - Opportunities for long-term partnership rather than one-time transactions.
- 2.4 Define the value proposition for institutions, foundations, and grant-making organizations

- Mission alignment.
- Program impact.
- Educational and leadership-development outcomes.
- Opportunities for collaboration, shared resources, and measurable impact.
- 2.5 Define the value proposition for major and legacy gift prospects
 - Transformational mission impact.
 - Long-term legacy.
 - Named or designated opportunities when approved.
 - Sustained influence on cadet, alumni, or organizational programs.

3. Key Task 3 - Standardize Development Terminology

- 3.1 Distinguish Membership from Development support
 - Membership represents belonging to CCAC.
 - Development represents financial, material, institutional, and strategic support of CCAC.
- 3.2 Standardize the use of Giving and Donations
 - Giving = ongoing, recurring, or scheduled financial support.
 - Donations = individual, unscheduled financial contributions.
- 3.3 Standardize additional Development terms
 - Sponsorship = support tied to an approved exchange of recognition, visibility, access, or other partnership value.
 - In-kind support = goods or services provided instead of money.
 - Grant = funds awarded through a formal application or proposal process.
 - Major gift = a significant philanthropic contribution requiring deliberate cultivation and individualized solicitation.
 - Legacy gift = a planned, estate, memorial, or other long-term contribution intended to create enduring impact.
- 3.4 Maintain consistent terminology across functional areas
 - Membership.
 - Development.
 - Finance.

- Marketing.
- Communications.

4. Key Task 4 - Publish and Reinforce the Development Message

- 4.1 Coordinate Development content for the CCAC website
 - Case for support.
 - Patriot Program.
 - Donations.
 - Sponsorship opportunities.
 - Grants and institutional partnerships where appropriate.
 - Major and legacy giving information.
- 4.2 Coordinate Development content for email and newsletter communications
 - Giving campaigns.
 - Donation opportunities.
 - Sponsor recognition.
 - Impact reporting.
 - Renewal and stewardship communications.
- 4.3 Coordinate Development content for social media and public-facing materials
 - Impact stories.
 - Supporter recognition.
 - Program outcomes.
 - Calls to action.
- 4.4 Coordinate with Marketing and Communications
 - Development defines the audience, case for support, opportunity, cultivation objective, and desired action.
 - Marketing supports positioning, campaign development, and promotional strategy.
 - Communications supports channel execution, publication, and organizational messaging.

5. Key Task 5 - Establish Development Authority and Coordination Principles

- 5.1 Empower the VP Development to execute approved Development activity

- Identify and engage prospects.
- Build relationships.
- Conduct meetings.
- Solicit support through approved programs and opportunities.
- Pursue in-kind resources and preliminary partnership opportunities.
- Coordinate Development volunteers and relationship owners.
- 5.2 Elevate commitments requiring higher approval
 - Capital expenditures.
 - Material unbudgeted expenditures.
 - Significant contractual obligations.
 - Multi-year financial obligations.
 - Naming rights.
 - Material restricted-gift conditions.
 - Significant legal, reputational, or organizational commitments.
 - New Development programs requiring Executive Committee approval.
- 5.3 Coordinate Development with Finance before financial commitments are finalized when appropriate
 - Confirm affordability of sponsor benefits or recognition items.
 - Assess financial impact of proposed programs.
 - Identify budgetary or restricted-fund implications.
- 5.4 Maintain Development records sufficient to support coordination and continuity
 - Prospect ownership.
 - Contact history.
 - Commitments and next steps.
 - Program participation.
 - Recognition preferences.

LOE Effect

A clear and widely understood Development identity and case for support that gives CCAC leaders and volunteers a common framework for explaining why support matters, presenting appropriate opportunities to different constituencies, coordinating with other

functional areas, and pursuing resources within clearly defined authority and approval boundaries.

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LOE 2 — Alumni Development

Operational Objective

Establish and sustain a comprehensive Alumni Development system that converts alumni affinity for the Maverick Battalion into recurring Giving, individual Donations, legacy participation, and long-term donor relationships through the approved Patriot Program, development of the Brick Program, and other appropriate Alumni Development opportunities.

End State

CCAC maintains a structured and sustainable Alumni Development system in which Maverick Battalion alumni can support the organization beyond Membership through recurring Giving, individual Donations, recognition and legacy opportunities, and progressively deeper levels of participation. The Patriot Program operates as the principal approved annual Giving program, the Brick Program is developed and implemented following approval, and alumni donor relationships are deliberately cultivated from initial participation toward sustained and potentially major or legacy-level support.

Note: The Patriot Program is treated as an approved CCAC Alumni Development program. The Brick Program is to be developed under this LOE and presented for Executive Committee approval before implementation.

Key Tasks

1. Key Task 1 - Administer and Grow the Patriot Program

- 1.1 Maintain the Patriot Program as CCAC's principal annual Giving program
 - Maintain approved Annual Giving Classes and participation standards.
 - Maintain clear separation between Patriot Program Giving and Membership.
 - Maintain consistent annual participation and renewal procedures.
- 1.2 Promote annual Patriot Program participation
 - Identify eligible alumni prospects.
 - Present the case for recurring annual Giving.
 - Provide simple enrollment and renewal pathways.
 - Coordinate campaign execution with Marketing and Communications.
- 1.3 Maintain Patriot Program recognition
 - Apply approved annual recognition standards.
 - Apply approved cumulative recognition standards where applicable.

- Maintain accurate recognition records.
- Respect supporter recognition preferences.
- 1.4 Increase Patriot Program retention and progression
 - Identify participants approaching renewal.
 - Identify lapsed participants.
 - Conduct appropriate re-engagement.
 - Identify supporters capable of progressing to higher levels of Giving.
- 1.5 Coordinate Patriot Program financial information with Finance
 - Development tracks participation, relationship status, recognition status, and renewal.
 - Finance maintains authoritative records of funds received and financial classification.

2. Key Task 2 - Develop and Implement the Brick Program

- 2.1 Develop the Brick Program concept and purpose
 - Define the Brick Program as a legacy and permanent-recognition opportunity.
 - Define eligibility and participation standards.
 - Define how the program supports CCAC's mission.
- 2.2 Develop the Brick Program financial and administrative structure
 - Develop proposed pricing.
 - Identify production and installation costs.
 - Identify administrative requirements.
 - Coordinate financial assumptions with Finance.
- 2.3 Develop Brick Program recognition and design standards
 - Engraving standards.
 - Placement standards.
 - Memorial and honorary language standards.
 - Donor-recognition standards.
- 2.4 Coordinate site, facility, and institutional requirements
 - Coordinate with UTA and Military Science as required.
 - Coordinate with other responsible university or facility officials.

- Identify installation, maintenance, access, and ownership considerations.
- 2.5 Present the Brick Program for approval
 - Prepare program concept.
 - Prepare financial implications.
 - Prepare proposed policies and procedures.
 - Obtain Executive Committee approval before implementation.
- 2.6 Implement and promote the approved Brick Program
 - Website information.
 - Alumni outreach.
 - Event promotion.
 - Recognition and stewardship.

3. Key Task 3 - Establish Alumni Giving and Donation Pathways

- 3.1 Provide recurring Giving pathways outside or in addition to the Patriot Program when appropriate
 - Monthly Giving.
 - Scheduled program-specific Giving.
 - Multi-year Giving commitments.
- 3.2 Provide individual Donation pathways
 - General Donations.
 - Program-specific Donations.
 - Event-specific Donations.
 - Memorial Donations.
 - Honorary Donations.
- 3.3 Clearly distinguish Giving from Donations in all materials and records
 - Giving reflects scheduled or ongoing support.
 - Donations reflect individual unscheduled contributions.
- 3.4 Make participation simple and accessible
 - Online options.
 - Event-based opportunities.
 - Personal outreach.

- Clear acknowledgment and confirmation procedures.

4. Key Task 4 - Develop Alumni Donor Progression

- 4.1 Identify alumni at different levels of Development engagement
 - No prior Development participation.
 - Individual Donation history.
 - Current Giving participation.
 - Patriot Program participation.
 - High-capacity or high-affinity prospects.
- 4.2 Develop appropriate progression pathways
 - Donation to recurring Giving.
 - Initial Patriot participation to renewal.
 - Lower-level Giving to increased Giving.
 - Recurring Giving to major-gift cultivation when appropriate.
 - Legacy interest to planned or memorial opportunities.
- 4.3 Use donor interest and affinity to guide progression
 - Cadet support.
 - Battalion history.
 - Leadership development.
 - Alumni engagement.
 - Memorial or legacy interests.
- 4.4 Avoid treating progression as automatic solicitation
 - Base progression on relationship, interest, capacity, and timing.
 - Preserve donor trust and voluntary participation.

5. Key Task 5 - Coordinate Alumni Development with Membership

- 5.1 Preserve the distinction between Membership and Development
 - Membership establishes belonging to CCAC.
 - Patriot Program participation, Brick Program participation, Giving, and Donations are separate Development activities.
- 5.2 Coordinate Combined Offers where approved
 - Maintain clear identification of the Membership component.

- Maintain clear identification of the Development component.
 - Avoid creating additional Membership classes based on Giving or Donations.
- 5.3 Coordinate alumni data systems
 - Membership status.
 - Patriot Program participation.
 - Giving history.
 - Donation history.
 - Brick Program participation.
 - Recognition status.
- 5.4 Coordinate alumni outreach to minimize duplication and confusion
 - Membership recruitment.
 - Development appeals.
 - Stewardship communications.
 - Event engagement.

6. Key Task 6 - Establish Alumni Development Performance Measures

- 6.1 Track Patriot Program participation and renewal
 - Active participants.
 - New participants.
 - Renewals.
 - Lapsed participants.
 - Progression between Giving levels.
- 6.2 Track Alumni Giving and Donations
 - Number of alumni participating in Giving.
 - Number of alumni making Donations.
 - Participation by class year or cohort when useful.
- 6.3 Track Brick Program participation after implementation
 - Participants.
 - Recognition status.
 - Program growth.

- 6.4 Maintain the structure so numerical targets can be inserted as approved
 - Participation targets.
 - Renewal targets.
 - Revenue targets.
 - Progression targets.

LOE Effect

A comprehensive Alumni Development system that provides Maverick Battalion alumni clear and meaningful opportunities to financially and materially support CCAC beyond Membership, produces recurring annual Giving through the Patriot Program, establishes individual Donation and legacy pathways, develops the Brick Program, strengthens donor relationships, and creates deliberate progression toward sustained and potentially transformational support.

LOE 3 — Individual, Family, and Community Development

Operational Objective

Develop financial, material, and relationship-based support from individuals outside the Maverick Battalion alumni population, including families, friends of the Corps, former cadre, veterans, community supporters, and other mission-aligned individuals who desire to support CCAC and the Maverick Battalion.

End State

CCAC maintains a diversified community of non-alumni supporters who understand the mission, have clear pathways for Giving and Donations, receive appropriate stewardship and recognition, and contribute financial, material, professional, or relationship-based resources that strengthen CCAC and the Maverick Battalion without obscuring the distinct role of Alumni Development.

Key Tasks

1. Key Task 1 - Identify Priority Non-Alumni Supporter Groups

- 1.1 Identify family and parent constituencies
 - Parents of current cadets.
 - Parents and families of alumni.
 - Spouses and family members of alumni.
- 1.2 Identify friends and affinity-based supporters
 - Friends of the Corps.
 - Former cadre.
 - Veterans.
 - Military supporters.
 - Leadership-development supporters.
- 1.3 Identify community supporters
 - Local civic leaders.
 - Community members.
 - Individuals connected to UTA, ROTC, or veteran communities.
- 1.4 Maintain prospect records and relationship ownership
 - Contact information.
 - Source of relationship.

- Areas of interest.
- Development history.

2. Key Task 2 - Develop Appropriate Support Opportunities for Non-Alumni Individuals

- 2.1 Provide Giving opportunities where appropriate
 - Recurring general support.
 - Scheduled program-specific support.
- 2.2 Provide individual Donation opportunities
 - General Donations.
 - Cadet-support Donations.
 - Event-specific Donations.
 - Memorial and honorary Donations.
- 2.3 Provide appropriate legacy and recognition opportunities
 - Brick Program participation when approved and eligible.
 - Memorial or honorary recognition.
 - Other approved recognition programs.
- 2.4 Provide non-financial support opportunities
 - Professional expertise.
 - Volunteer service.
 - Mentoring or speaking support where coordinated with the responsible functional area.
 - Access to community resources or relationships.

3. Key Task 3 - Conduct Targeted Individual and Community Outreach

- 3.1 Develop audience-specific outreach approaches
 - Parents and families.
 - Former cadre.
 - Veterans.
 - Community supporters.
- 3.2 Use appropriate outreach channels
 - Personal introductions.
 - Email.

- Events.
- Website.
- Social media.
- 3.3 Coordinate campaign execution with Marketing and Communications
 - Development defines the audience, opportunity, and desired action.
 - Marketing and Communications support promotion and channel execution.
- 3.4 Integrate outreach with appropriate CCAC and ROTC events
 - Hall of Honor.
 - Reunions.
 - Parent and family engagement activities.
 - Cadet-related events when appropriate and approved.

4. Key Task 4 - Develop Community Relationships that Produce Resources

- 4.1 Identify individuals who can provide access to facilities, services, or expertise
 - Meeting space.
 - Event venues.
 - Printing.
 - Transportation.
 - Professional services.
- 4.2 Develop in-kind support relationships
 - Goods.
 - Services.
 - Equipment.
 - Professional assistance.
- 4.3 Capture and coordinate resource-sharing opportunities
 - Identify value provided.
 - Identify obligations or conditions.
 - Elevate commitments requiring financial or contractual approval.
- 4.4 Maintain stewardship of non-financial supporters
 - Thank and recognize appropriately.

- Report impact.
- Maintain the relationship after support is provided.

5. Key Task 5 - Measure and Improve Non-Alumni Development

- 5.1 Track active non-alumni supporters
 - New supporters.
 - Returning supporters.
 - Lapsed supporters.
- 5.2 Track Giving, Donations, and in-kind participation
 - Participation by type.
 - Source of relationship.
 - Renewal or repeat participation.
- 5.3 Identify high-potential individuals for deeper cultivation
 - Major-gift prospects.
 - Community connectors.
 - Institutional introducers.
- 5.4 Maintain the structure so measurable targets can be added later
 - Participation.
 - Retention.
 - Resource value.

LOE Effect

A diversified network of families, individuals, and community supporters who provide Giving, Donations, in-kind resources, expertise, and relationships that strengthen CCAC's capacity while expanding support beyond the Maverick Battalion alumni population.

LOE 4 — Corporate Sponsorship and Partnership Development

Operational Objective

Develop a structured corporate sponsorship and partnership system that creates mutually beneficial relationships with companies and businesses capable of providing financial, in-kind, professional, employment, or strategic support to CCAC and the Maverick Battalion.

End State

CCAC maintains a diversified portfolio of active corporate relationships that provide recurring sponsorships, Giving, Donations, in-kind resources, professional opportunities, or other strategic value. Corporate partners understand the value of association with CCAC, receive promised benefits, and are deliberately cultivated toward renewal, expansion, and long-term partnership.

Key Tasks

1. Key Task 1 - Identify Corporate and Business Prospects

- 1.1 Identify companies aligned with military, veteran, leadership, and ROTC interests
 - Defense and aerospace companies.
 - Security companies.
 - Veteran-owned businesses.
 - Military-friendly employers.
 - Leadership-development organizations.
- 1.2 Identify local and regional businesses
 - Arlington-area businesses.
 - Dallas-Fort Worth businesses.
 - Companies with UTA ties.
 - Companies with military or veteran interests.
- 1.3 Identify alumni-owned, alumni-led, or alumni-connected companies
 - Business owners.
 - Senior executives.
 - Corporate decision-makers.
- 1.4 Identify companies with recruiting or talent-development interests
 - Military officers and veterans.

- Engineers.
- Logisticians.
- Public servants.
- Business and leadership talent.
- 1.5 Build and maintain a corporate prospect database
 - Company.
 - Contact.
 - Relationship connection.
 - Industry.
 - Potential fit.
 - Relationship owner.
 - Status and next action.

2. Key Task 2 - Develop Corporate Sponsorship Structures

- 2.1 Define sponsorship levels and categories
 - Entry sponsor.
 - Event sponsor.
 - Program sponsor.
 - Strategic partner.
 - Multi-year partner.
- 2.2 Define sponsor benefits
 - Website recognition.
 - Newsletter recognition.
 - Event signage.
 - Social media acknowledgment.
 - Table or booth opportunities when appropriate.
 - Speaking or networking opportunities when appropriate.
 - Access to approved alumni or cadet-facing events within applicable guidelines.
- 2.3 Define sponsorship opportunities by event or program
 - Hall of Honor.

- Reunions.
 - Cadet leadership development.
 - Mentorship events.
 - Alumni networking events.
 - Historical preservation projects.
- 2.4 Coordinate sponsorship structures with Finance
 - Cost of sponsor benefits.
 - Net financial value.
 - Budget implications.
 - Multi-year obligations.

3. Key Task 3 - Develop Corporate Partnership Opportunities Beyond Sponsorship

- 3.1 Identify in-kind support opportunities
 - Equipment.
 - Food or catering.
 - Printing.
 - Technology.
 - Transportation.
 - Professional services.
- 3.2 Identify employment and professional-development opportunities
 - Internships.
 - Recruiting.
 - Mentorship.
 - Professional speakers.
 - Career networking.
- 3.3 Identify facility or resource-sharing opportunities
 - Meeting space.
 - Event facilities.
 - Training facilities.
 - Shared equipment.

- 3.4 Identify opportunities for multi-year strategic partnership
 - Recurring program support.
 - Recurring event support.
 - Long-term in-kind arrangements.
 - Mutually beneficial initiatives.

4. Key Task 4 - Create Corporate Outreach Tools and Materials

- 4.1 Develop sponsorship and partnership materials
 - One-page handout.
 - Sponsorship menu.
 - Corporate presentation.
 - Impact examples.
- 4.2 Develop outreach communications
 - Initial contact email.
 - Follow-up email.
 - Meeting request.
 - Thank-you message.
- 4.3 Develop meeting and discovery tools
 - Introduction script.
 - Discovery questions.
 - Value-proposition talking points.
 - Next-step language.
- 4.4 Coordinate external presentation with Marketing and Communications
 - Branding.
 - Visual presentation.
 - Publication.
 - Sponsor recognition.

5. Key Task 5 - Execute Corporate Outreach and Cultivation

- 5.1 Prioritize warm outreach
 - Alumni introductions.

- Board member introductions.
 - Existing partner introductions.
- 5.2 Conduct direct outreach when a warm relationship does not exist
 - Email.
 - Phone.
 - LinkedIn.
 - In-person outreach when appropriate.
- 5.3 Conduct discovery meetings
 - Understand company interests.
 - Identify mutual value.
 - Determine appropriate opportunity.
- 5.4 Present appropriate proposals
 - Sponsorship.
 - In-kind support.
 - Program support.
 - Strategic partnership.
- 5.5 Elevate significant commitments for approval when required
 - Multi-year obligations.
 - Capital expenditures.
 - Nonstandard agreements.
 - Significant contractual terms.

6. Key Task 6 - Convert Corporate Support into Long-Term Partnership

- 6.1 Deliver promised benefits
 - Recognition.
 - Visibility.
 - Event placement.
 - Communications commitments.
- 6.2 Provide post-event or post-program impact updates
 - Participation.

- Outcomes.
 - Recognition delivered.
 - Mission impact.
- 6.3 Pursue renewal and expansion
 - Annual renewal.
 - Multi-event support.
 - Multi-year partnership.
 - Expanded in-kind or professional support.
- 6.4 Track corporate partnership performance
 - Active sponsors.
 - Renewal rate.
 - Sponsorship value.
 - In-kind value where reasonably measurable.
 - Partnership expansion.

LOE Effect

A structured corporate Development system that gives companies clear reasons to support CCAC, creates mutual value, produces financial and non-financial resources, and converts successful sponsorships and business relationships into sustained strategic partnerships.

LOE 5 — Institutional Partnerships, Grants, and Foundations

Operational Objective

Develop and sustain relationships with universities, colleges, foundations, grant-making organizations, veteran and community organizations, and other institutions capable of providing financial support, facilities, shared resources, program access, expertise, or strategic collaboration that advances CCAC's mission.

End State

CCAC maintains productive institutional relationships with UTA, Military Science, other colleges and universities supporting or participating in the ROTC program, foundations, grant-making organizations, and appropriate community or veteran institutions. These relationships produce grants, shared resources, facilities access, collaboration, program support, and other measurable value while preserving CCAC's independent governance and complying with applicable institutional requirements.

Key Tasks

1. Key Task 1 - Map and Prioritize Institutional Relationships

- 1.1 Identify UTA and Military Science relationships
 - University leadership.
 - Department of Military Science.
 - Alumni-related offices.
 - Facilities and event organizations.
 - Advancement or foundation offices where appropriate.
- 1.2 Identify other colleges and universities associated with the ROTC program
 - Participating institutions.
 - Cross-enrollment partners.
 - Schools with formal or informal agreements supporting the ROTC program.
- 1.3 Identify veteran, military, civic, and community organizations
 - Veteran-service organizations.
 - Military associations.
 - Civic organizations.
 - Leadership-development organizations.
- 1.4 Identify foundations and grant-making organizations

- Private foundations.
 - Corporate foundations.
 - Community foundations.
 - Educational and leadership-development funders.
 - Veteran and military-support grantors.
- 1.5 Maintain an institutional prospect and relationship map
 - Organization.
 - Contact.
 - Relationship owner.
 - Area of alignment.
 - Potential opportunity.
 - Current status.

2. Key Task 2 - Develop Institutional Partnership Opportunities

- 2.1 Identify shared-use opportunities
 - Meeting facilities.
 - Event venues.
 - Storage.
 - Training space.
 - Equipment.
- 2.2 Identify shared-program opportunities
 - Alumni engagement.
 - Leadership development.
 - Mentorship.
 - Professional development.
 - Historical preservation.
- 2.3 Identify access and network opportunities
 - Institutional communications.
 - Appropriate alumni networks.
 - Community partnerships.

- Professional networks.
- 2.4 Develop mutually beneficial arrangements
 - Define CCAC value to the partner.
 - Define partner value to CCAC.
 - Identify responsibilities and limitations.
 - Elevate formal agreements for appropriate approval.

3. Key Task 3 - Establish a Grant and Foundation Development Program

- 3.1 Identify grant opportunities aligned with CCAC's mission
 - Cadet leadership development.
 - Veteran and military support.
 - Education.
 - Mentorship.
 - Historical preservation.
 - Community engagement.
- 3.2 Maintain a grant prospect calendar
 - Funder.
 - Program area.
 - Eligibility.
 - Deadline.
 - Required match.
 - Reporting requirements.
- 3.3 Develop reusable grant content and supporting materials
 - Organizational description.
 - Mission and case for support.
 - Program descriptions.
 - Impact statements.
 - Leadership and governance information.
 - Financial information coordinated with Finance.
- 3.4 Prepare and submit grant applications

- Confirm eligibility.
- Confirm program fit.
- Identify required institutional approvals.
- Coordinate budget information with Finance.
- Submit complete and accurate applications.
- 3.5 Maintain grant compliance and reporting coordination
 - Development owns grant relationship and narrative stewardship.
 - Finance provides authoritative financial reporting and restricted-fund accounting.
 - Program owners provide outcome information.

4. Key Task 4 - Develop Foundation Relationships Beyond Individual Grant Applications

- 4.1 Identify foundations with long-term mission alignment
 - Education.
 - Veterans.
 - Leadership.
 - Community development.
 - Historic preservation.
- 4.2 Build relationships with foundation representatives
 - Introductory meetings.
 - Program briefings.
 - Site or event invitations when appropriate.
- 4.3 Match CCAC initiatives to foundation priorities
 - Avoid forcing programs into poorly aligned funding criteria.
 - Develop proposals around genuine mission alignment.
- 4.4 Steward foundation relationships after awards or declines
 - Report impact.
 - Maintain professional communication.
 - Pursue future opportunities when appropriate.

5. Key Task 5 - Coordinate Institutional Relationships with UTA, Military Science, and Partner Schools

- 5.1 Preserve strong working relationships with UTA and Military Science
 - Coordinate activities involving cadets, facilities, events, or institutional resources.
 - Respect university and ROTC approval requirements.
- 5.2 Expand relationships to other universities and colleges associated with the ROTC program
 - Identify mutual interests.
 - Include partner-school alumni and stakeholders where appropriate.
 - Explore shared events, outreach, and facilities.
- 5.3 Preserve CCAC's independent nonprofit responsibilities
 - Avoid implying university approval where none exists.
 - Maintain clear organizational authority.
 - Elevate formal commitments for appropriate approval.
- 5.4 Maintain records of institutional agreements and commitments
 - Relationship owner.
 - Terms.
 - Duration.
 - CCAC obligations.
 - Partner obligations.

6. Key Task 6 - Measure Institutional and Grant Development Performance

- 6.1 Track active institutional partners
 - New relationships.
 - Active collaborations.
 - Renewed or expanded arrangements.
- 6.2 Track grants
 - Opportunities identified.
 - Applications submitted.
 - Awards received.

- Declines.
 - Reporting completed.
- 6.3 Track non-financial institutional value where reasonably measurable
 - Facility use.
 - Services.
 - Equipment.
 - Program access.
- 6.4 Maintain the structure so measurable targets can be added later
 - Grant applications.
 - Grant awards.
 - Active partnerships.
 - Estimated resource value.

LOE Effect

A coordinated institutional Development system that produces grants, foundation support, facilities, shared resources, program access, and strategic collaboration through productive relationships with universities, colleges, foundations, grant-making organizations, and other mission-aligned institutions.

LOE 6 — Major Gifts and Legacy Giving

Operational Objective

Establish a disciplined major gifts and legacy giving program that identifies, cultivates, solicits, and stewards high-capacity and high-affinity supporters capable of making significant or transformational contributions to CCAC's mission, programs, and long-term legacy.

End State

CCAC maintains an active major-gift pipeline and legacy-giving program in which qualified prospects are deliberately identified, assigned to relationship owners, cultivated around their interests, presented with appropriately approved opportunities, and stewarded after commitment. Major and legacy gifts provide transformational support without replacing annual Giving, routine Donations, or other Development programs.

Key Tasks

1. Key Task 1 - Establish Major Gift and Legacy Giving Standards

- 1.1 Establish a working major-gift threshold
 - Define an initial threshold appropriate to CCAC's size and maturity.
 - Review the threshold periodically as Development capacity increases.
- 1.2 Define major-gift categories
 - One-time major gifts.
 - Multi-year pledges.
 - Program-specific major gifts.
 - Memorial or honorary major gifts.
 - Named opportunities when approved.
- 1.3 Define legacy-giving categories
 - Planned gifts.
 - Estate gifts.
 - Long-term memorial gifts.
 - Named funds, awards, or programs when approved.
- 1.4 Preserve distinction from annual Giving and Donations
 - Annual Giving supports recurring participation.
 - Donations are individual unscheduled contributions.

- Major and legacy gifts require individualized cultivation and stewardship.

2. Key Task 2 - Identify and Qualify Major Gift Prospects

- 2.1 Identify high-capacity alumni
 - Business owners.
 - Senior executives.
 - Senior military leaders.
 - Long-term supporters.
 - Alumni with strong Battalion affinity.
- 2.2 Identify non-alumni major-gift prospects
 - Families.
 - Friends of the Corps.
 - Veterans and military supporters.
 - Community and philanthropic leaders.
- 2.3 Identify corporate and institutional leaders with personal affinity
 - Alumni executives.
 - Military-connected executives.
 - UTA or ROTC-connected leaders.
- 2.4 Develop a major-gift prospect profile
 - Relationship connection.
 - Estimated capacity.
 - Areas of interest.
 - Prior Giving and Donation history.
 - Relationship owner.
 - Current cultivation stage.

3. Key Task 3 - Develop Major Gift Opportunities

- 3.1 Develop an approved menu of potential major-gift opportunities
 - Cadet leadership development.
 - Historical preservation.
 - Hall of Honor or recognition programs.

- Alumni engagement.
 - Mentorship and professional development.
 - Other approved mission priorities.
- 3.2 Develop impact descriptions
 - What the gift supports.
 - Who benefits.
 - Why it matters.
 - What success looks like.
- 3.3 Match opportunities to donor interests
 - Legacy.
 - Cadet support.
 - History.
 - Leadership development.
 - Memorial interests.
- 3.4 Obtain appropriate approval for nonstandard or significant opportunities
 - Naming rights.
 - Multi-year commitments.
 - Restricted conditions.
 - Capital projects.

4. Key Task 4 - Create Individualized Cultivation Plans

- 4.1 Assign a relationship owner
 - VP Development.
 - President.
 - Board or Executive Committee member.
 - Trusted alumnus.
 - Classmate or former peer.
- 4.2 Research the prospect's connection and interests
 - Class year.
 - ROTC experience.

- Career history.
 - Relationships.
 - Prior support.
 - Areas of interest.
- 4.3 Develop a cultivation sequence
 - Initial contact.
 - Relationship meeting.
 - Mission discussion.
 - Opportunity discussion.
 - Ask preparation.
 - Formal ask.
 - Follow-up.
 - Stewardship.
- 4.4 Determine the appropriate ask
 - Relationship.
 - Capacity.
 - Interest.
 - Opportunity.
 - Timing.

5. Key Task 5 - Conduct Major Gift Solicitations

- 5.1 Prepare before the ask
 - Confirm relationship owner.
 - Confirm opportunity.
 - Confirm ask amount or commitment.
 - Prepare supporting materials.
 - Determine appropriate participants.
- 5.2 Conduct personal solicitation
 - Prefer in-person meetings when practical.
 - Use video or other personal methods when distance requires.

- Avoid relying on mass communication for major gifts.
- 5.3 Make a clear and specific ask
 - Explain need.
 - Explain opportunity.
 - Explain impact.
 - Request a specific commitment when appropriate.
- 5.4 Follow up professionally
 - Thank the prospect.
 - Provide requested information.
 - Track response.
 - Schedule next action.

6. Key Task 6 - Establish Legacy Giving Capabilities

- 6.1 Develop basic legacy-giving information
 - Planned giving concepts.
 - Estate gifts.
 - Beneficiary designations where appropriate.
 - Memorial and honorary legacy opportunities.
- 6.2 Coordinate legal and financial guidance appropriately
 - Do not provide individualized legal or tax advice.
 - Encourage supporters to consult qualified professional advisors.
 - Coordinate organizational acceptance requirements with Finance and leadership.
- 6.3 Develop legacy recognition standards
 - Public or private recognition.
 - Donor preference.
 - Named recognition when approved.
- 6.4 Maintain records of documented legacy intentions
 - Relationship owner.
 - Type of commitment.
 - Documentation status.

- Stewardship plan.

7. Key Task 7 - Steward Major and Legacy Supporters

- 7.1 Thank supporters personally and promptly
 - Personal call.
 - Leadership acknowledgment.
 - Written acknowledgment.
- 7.2 Recognize according to supporter preference
 - Public recognition.
 - Private recognition.
 - Event recognition.
 - Named opportunity when approved.
- 7.3 Provide individualized impact updates
 - Program outcomes.
 - Cadet or alumni impact.
 - Progress toward intended purpose.
- 7.4 Maintain the relationship after the gift
 - Continued engagement.
 - Invitations to relevant events.
 - Future opportunities when appropriate.

LOE Effect

A disciplined major and legacy giving program that identifies high-capacity and high-affinity supporters, connects them to meaningful mission opportunities, secures significant and transformational commitments, and sustains long-term relationships capable of materially strengthening CCAC's mission and future capacity.

LOE 7 — Relationship-Based Development Outreach

Operational Objective

Leverage trusted relationships among alumni, board members, class leaders, corporate contacts, institutional partners, and community supporters to open doors to prospective donors, sponsors, grantors, major-gift prospects, and strategic partners.

End State

CCAC maintains an active network of Development connectors and relationship owners who use trusted personal and professional relationships to identify prospects, facilitate introductions, increase response rates, coordinate cultivation, and reduce unnecessary cold outreach across all Development LOEs.

Key Tasks

1. Key Task 1 - Map Development Relationships

- 1.1 Identify relationship networks
 - Alumni-to-alumni connections.
 - Board and Executive Committee networks.
 - Class-year networks.
 - Corporate relationships.
 - UTA and ROTC relationships.
 - Partner-school relationships.
 - Veteran and community networks.
- 1.2 Identify highly connected individuals
 - Alumni with broad networks.
 - Business leaders.
 - Former commanders and cadre.
 - Long-time CCAC supporters.
- 1.3 Identify warm introduction opportunities
 - Individual supporters.
 - Corporate sponsors.
 - Institutional partners.
 - Foundation contacts.

- Major-gift prospects.
- 1.4 Maintain a relationship map
 - Prospect.
 - Connector.
 - Relationship strength.
 - Current Development opportunity.

2. Key Task 2 - Assign and Manage Relationship Owners

- 2.1 Assign relationship owners to priority prospects
 - VP Development.
 - President.
 - Board or Executive Committee member.
 - Class representative.
 - Trusted alumnus or supporter.
- 2.2 Define relationship-owner responsibilities
 - Make or request introductions.
 - Maintain contact.
 - Coordinate with Development.
 - Track engagement.
 - Support next steps.
- 2.3 Prevent duplicate or conflicting outreach
 - Coordinate through Development tracking.
 - Identify a primary relationship owner.
 - Deconflict multiple CCAC contacts.
- 2.4 Reassign relationships when appropriate
 - Change in volunteer availability.
 - Better relationship fit.
 - Leadership transition.

3. Key Task 3 - Develop Relationship-Based Outreach Tools

- 3.1 Create introduction scripts and talking points

- Individual supporters.
 - Corporate prospects.
 - Institutional contacts.
 - Major-gift prospects.
- 3.2 Create referral and introduction requests
 - Short explanation of CCAC.
 - Reason for introduction.
 - Desired next step.
- 3.3 Create follow-up templates
 - Thank-you.
 - Meeting confirmation.
 - Information follow-up.
 - Next-step communication.
- 3.4 Provide Development guidance to connectors
 - Avoid premature asks.
 - Preserve trust.
 - Coordinate with the assigned Development lead.

4. Key Task 4 - Conduct Warm Introduction Campaigns

- 4.1 Ask CCAC leaders to identify potential supporters and partners
 - Personal contacts.
 - Business contacts.
 - Institutional contacts.
 - Former classmates.
 - Military and veteran networks.
- 4.2 Ask alumni and supporters to identify potential organizations or individuals
 - Alumni-owned businesses.
 - Employers.
 - Foundations.
 - Community organizations.

- Major-donor prospects.
- 4.3 Use class-year and peer networks for introductions
 - Prioritize trust-based outreach.
 - Encourage personal introductions over cold asks.
- 4.4 Track introductions and outcomes
 - Introduction requested.
 - Introduction made.
 - Meeting scheduled.
 - Opportunity identified.
 - Support secured.

5. Key Task 5 - Integrate Relationship Outreach Across Development

- 5.1 Support Alumni Development
 - Patriot Program participation.
 - Alumni Donations.
 - Brick Program participation when implemented.
- 5.2 Support corporate Development
 - Warm introductions to companies and decision-makers.
- 5.3 Support institutional and grant Development
 - Introductions to university, foundation, and grant contacts.
- 5.4 Support major-gift cultivation
 - Trusted introductions.
 - Relationship ownership.
 - Personal cultivation.
- 5.5 Support stewardship
 - Maintain relationships after support is secured.

6. Key Task 6 - Measure Relationship-Based Development Effectiveness

- 6.1 Track prospects generated through relationships
- 6.2 Track meetings resulting from warm introductions
- 6.3 Track Giving, Donations, sponsorships, grants, and partnerships influenced by relationship outreach

- 6.4 Identify high-performing relationship networks and connectors
- 6.5 Use results to refine relationship priorities

LOE Effect

A relationship-driven Development network that uses trusted personal and professional connections to open doors, increase supporter and partner response rates, reduce cold outreach, strengthen cultivation, and multiply the effectiveness of CCAC's overall Development system.

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LOE 8 — Donor and Partner Stewardship, Recognition, and Retention

Operational Objective

Create a consistent stewardship, recognition, and retention system that thanks, recognizes, informs, and retains donors, Giving participants, sponsors, grantors, institutional partners, and other supporters so they remain connected to CCAC and understand the impact of their support.

End State

CCAC maintains a professional stewardship system in which supporters are acknowledged promptly, recognized according to preference and approved standards, shown the impact of their support, and deliberately retained through continued relationship management. Stewardship applies to financial and non-financial supporters and supports renewal, increased Giving, repeat Donations, partnership expansion, and long-term trust.

Key Tasks

1. Key Task 1 - Establish Supporter Acknowledgment Procedures

- 1.1 Send timely acknowledgments
 - Email acknowledgment.
 - Written acknowledgment for significant support.
 - Personal call for major gifts, key sponsors, or significant partners.
- 1.2 Assign acknowledgment responsibility
 - VP Development.
 - President.
 - Relationship owner.
 - Other appropriate CCAC leader.
- 1.3 Standardize acknowledgment content
 - Thank the supporter.
 - Identify what was provided.
 - Explain mission impact.
 - Confirm recognition preference when applicable.
- 1.4 Coordinate financial receipts and acknowledgments with Finance
 - Finance provides authoritative financial receipt information.

- Development provides relationship-based acknowledgment and stewardship.

2. Key Task 2 - Maintain Supporter Recognition Programs

- 2.1 Recognize Patriot Program participants
 - Annual recognition.
 - Approved pins or other recognition.
 - Cumulative recognition where applicable.
- 2.2 Recognize Brick Program participants after implementation
 - Permanent recognition.
 - Memorial or honorary recognition where appropriate.
- 2.3 Recognize major and legacy supporters
 - Public recognition with permission.
 - Leadership recognition.
 - Named opportunities when approved.
- 2.4 Recognize corporate sponsors and partners
 - Website.
 - Newsletter.
 - Event signage.
 - Social media.
 - Program recognition.
- 2.5 Recognize institutional and in-kind partners
 - Appropriate public acknowledgment.
 - Event recognition.
 - Partnership recognition.
- 2.6 Protect supporter privacy and preference
 - Do not publish names or giving information without appropriate permission.

3. Key Task 3 - Provide Impact Reporting

- 3.1 Communicate how support was used
 - Cadet programs.
 - Alumni engagement.

- Events.
 - Historical preservation.
 - Organizational initiatives.
- 3.2 Share impact stories
 - Cadet outcomes.
 - Alumni outcomes.
 - Program results.
 - Sponsor-supported activities.
- 3.3 Create recurring impact updates
 - Annual Development impact report.
 - Sponsor recap.
 - Grant report.
 - Major-gift update.
 - Newsletter impact section.
- 3.4 Coordinate financial information with Finance
 - Use Finance as the authoritative source for financial totals and use of restricted funds.

4. Key Task 4 - Retain and Renew Giving Participants, Donors, Sponsors, and Partners

- 4.1 Track renewal and continuation points
 - Patriot Program participants.
 - Other scheduled Giving.
 - Sponsors.
 - Multi-year commitments.
 - Institutional partnerships.
- 4.2 Conduct renewal outreach
 - Email reminders.
 - Personal calls.
 - Relationship-owner follow-up.
 - Event-based renewal opportunities.
- 4.3 Identify lapsed supporters

- Lapsed Giving participants.
- Prior-year donors who have not repeated support where repeat participation may be appropriate.
- Sponsors who have not renewed.
- Partners whose engagement has declined.
- 4.4 Re-engage lapsed supporters professionally
 - Thank them for prior support.
 - Share current impact.
 - Invite renewed participation without guilt-based messaging.

5. Key Task 5 - Maintain Supporter Trust

- 5.1 Honor supporter intent
 - Capture restrictions or designations accurately.
 - Coordinate with Finance for proper financial handling.
 - Report back when appropriate.
- 5.2 Maintain accurate Development records
 - Participation.
 - Recognition.
 - Contact history.
 - Commitments.
- 5.3 Protect private information
 - Limit access to sensitive Development information.
 - Coordinate secure data practices.
- 5.4 Avoid overstating results or benefits
 - Maintain accurate impact reporting.
 - Deliver promised sponsor and partner benefits.

6. Key Task 6 - Encourage Appropriate Deepening of Support

- 6.1 Identify Giving participants who may increase participation
- 6.2 Identify repeat donors who may move into scheduled Giving
- 6.3 Identify sponsors who may expand into strategic partnerships

- 6.4 Identify high-capacity supporters who may be appropriate for major-gift cultivation
- 6.5 Base progression on relationship, interest, capacity, and timing

LOE Effect

A reliable stewardship and recognition system that increases trust, improves retention, encourages continued and expanded support, strengthens donor and partner relationships, and reinforces CCAC's reputation as a professional, accountable, and mission-focused organization.

LOE 9 — Development Tracking, Reporting, and Optimization

Operational Objective

Establish a Development tracking, reporting, and assessment system that allows CCAC to manage supporter relationships, measure Development performance, monitor pipelines and participation, evaluate outreach effectiveness, and continuously improve resource-development strategy while relying on Finance for authoritative financial accounting and reporting.

End State

CCAC maintains an accurate and useful Development management system that tracks prospects, relationships, Giving participation, Donations, sponsorships, grants, major-gift cultivation, partnerships, stewardship, retention, and other Development activity. Leadership receives regular Development performance information, measurable targets can be inserted and adjusted over time, and Development decisions are informed by reliable data without duplicating Finance's accounting and control responsibilities.

Key Tasks

1. Key Task 1 - Establish Development Tracking Categories

- 1.1 Track individual supporter activity
 - Name and contact information.
 - Relationship source.
 - Giving participation.
 - Donation history.
 - Recognition preference.
 - Renewal or retention status.
- 1.2 Track Patriot Program participation
 - Current-year participation.
 - Years of participation.
 - Recognition status.
 - Renewal status.
 - Progression.
- 1.3 Track corporate activity
 - Company.

- Contact.
 - Sponsorship or partnership type.
 - Benefits promised.
 - Benefits delivered.
 - Renewal date.
- 1.4 Track institutional and grant activity
 - Partner or funder.
 - Opportunity.
 - Application status.
 - Award status.
 - Reporting requirements.
 - Relationship owner.
- 1.5 Track major-gift pipeline
 - Prospect identified.
 - Relationship owner assigned.
 - Contact made.
 - Meeting held.
 - Opportunity identified.
 - Ask prepared.
 - Ask made.
 - Commitment secured.
 - Stewardship underway.
- 1.6 Track non-financial Development support
 - In-kind support.
 - Facilities.
 - Services.
 - Equipment.
 - Strategic access or collaboration.

2. Key Task 2 - Define Development Performance Measures

- 2.1 Track participation measures
 - Active supporters.
 - New supporters.
 - Retained supporters.
 - Lapsed supporters.
- 2.2 Track Giving and Donation measures
 - Number of Giving participants.
 - Number of Donations.
 - Renewal rates.
 - Progression or upgrade rates.
 - Financial totals verified with Finance.
- 2.3 Track corporate measures
 - Number of active sponsors and partners.
 - Renewal rate.
 - Sponsorship and in-kind value.
- 2.4 Track institutional and grant measures
 - Active institutional partners.
 - Grant applications.
 - Grant awards.
 - Shared-resource arrangements.
- 2.5 Track major-gift measures
 - Qualified prospects.
 - Cultivation meetings.
 - Asks.
 - Commitments.
- 2.6 Maintain placeholders for future approved targets
 - Participation targets.
 - Revenue targets.

- Retention targets.
- Partnership targets.
- Grant targets.
- Major-gift targets.

3. Key Task 3 - Establish a Development Reporting Rhythm

- 3.1 Provide routine Development updates
 - New supporters.
 - New sponsors or partners.
 - Grant activity.
 - Major-gift pipeline activity.
 - Current opportunities and obstacles.
- 3.2 Provide quarterly leadership reports
 - Progress toward Development priorities.
 - Participation trends.
 - Retention trends.
 - Pipeline status.
 - Issues requiring leadership action.
- 3.3 Conduct an annual Development review
 - Full-year performance.
 - Supporter retention.
 - Sponsorship performance.
 - Grant performance.
 - Major-gift progress.
 - Institutional partnership results.
 - Recommendations for the next year.
- 3.4 Coordinate authoritative financial totals with Finance
 - Development reports relationship and program performance.
 - Finance reports authoritative revenue, balances, and financial position.

4. Key Task 4 - Use Data to Improve Development Strategy

- 4.1 Identify high-performing outreach methods
 - Email.
 - Phone.
 - Events.
 - Social media.
 - Warm introductions.
 - Personal meetings.
- 4.2 Identify high-performing stakeholder groups
 - Alumni cohorts.
 - Families and community supporters.
 - Companies.
 - Institutional partners.
 - Foundations.
- 4.3 Identify underperforming efforts
 - Low-response campaigns.
 - Sponsorship structures with limited interest.
 - Low-renewal supporter segments.
 - Ineffective outreach methods.
- 4.4 Adjust Development strategy based on results
 - Improve case for support.
 - Refine opportunities.
 - Reallocate outreach effort.
 - Increase personal cultivation where effective.

5. Key Task 5 - Coordinate Development Data with Finance and Other Functional Areas

- 5.1 Coordinate with Finance
 - Confirm funds received.
 - Reconcile Development participation records to authoritative financial information when needed.

- Maintain separation between Development relationship tracking and financial accounting.
- 5.2 Coordinate with Membership
 - Alumni identity and membership status.
 - Combined Offers where applicable.
 - Alumni Development participation.
- 5.3 Coordinate with Communications and Marketing
 - Campaign results.
 - Audience response.
 - Channel effectiveness.
- 5.4 Coordinate with program owners and institutional partners
 - Impact information.
 - Grant outcomes.
 - Sponsor-supported program results.

6. Key Task 6 - Protect Development Information and Maintain Continuity

- 6.1 Limit access to sensitive supporter information
- 6.2 Use secure data-storage practices
- 6.3 Maintain clear relationship ownership and contact history
- 6.4 Preserve Development records through leadership transitions
- 6.5 Maintain current procedures, templates, and dashboards

LOE Effect

A disciplined Development management system that allows CCAC to measure performance, manage supporter and partner relationships, monitor pipelines, improve outreach effectiveness, establish future measurable targets, and make informed Development decisions while preserving Finance as the authoritative source for financial accounting and reporting.

Appendix

Plans & Concepts

The following supporting plans, policies, concepts, and implementation tools may be developed under or in support of this Strategic Plan:

- Patriot Program implementing guidance and recognition standards.
- Brick Program concept, approval package, pricing, recognition, installation, and administrative procedures.
- Corporate sponsorship packages and partnership templates.
- Grant and foundation prospect calendar.
- Grant application and reporting templates.
- Major Gift and Legacy Giving implementing guidance.
- Donor and partner recognition policy.
- Development relationship-management procedures.
- Development dashboard and reporting templates.
- Development–Finance coordination procedures.
- Development–Membership coordination procedures.
- Marketing and Communications campaign-support procedures.
- Institutional partnership and shared-resource agreement procedures.