

Advancement Support Services

Departments/Units:

Advancement Research & Prospect Management/Information Services (**Contact:** Lisa Hornick, Director)

Donor Relations and Stewardship (**Contact:** Cristie Gryszka, Director)

Advancement Communications (**Contact:** Kim Patton, Assistant Director)

Year: 2018

Overview/Mission/Purpose

Advancement Research & Prospect Management/Information Services (ARPM/IS) helps to increase private support to Wright State University by identifying potential sources of funding, and by providing staff with the information and tools to manage relationships with donors, prospects, and alumni.

The **Donor Relations** and **Stewardship** program sustains and nurtures the University's relationships with its donors by providing timely and appropriate gift acknowledgement, recognition, and communication about the investment and use of their gifts. The program is also designed to encourage collaboration between the central office and development staff assigned to specific units and colleges, to preserve institutional memory about our donors and their relationships, to support and advise on stewardship and donor relations efforts, and manage the awarding process of donor funded scholarships.

Advancement Communications develops key messaging for the many stakeholders of University Advancement and the Wright State University Foundation. Stakeholders include donors, alumni, faculty, staff, students, and the community at large.

ARPM/IS Staffing*

	FY16	FY17	FY18	FY19
# Full Time Staff	7.60	6.60	4.60	4.60**
# Student Employee FTE	1	0	3	2

Donor Relations & Stewardship Staffing

	FY16	FY17	FY18	FY19
# Full Time Staff	2	2	2	2
# Student Employee FTE	0	0	0	0

Advancement Communications Staffing

	FY16	FY17	FY18	FY19
# Full Time Staff	1	1	1	1
# Student Employee FTE	0	0	0	0

Advancement Communications Budget*

	FY16	FY17	FY18	FY19
Total Adjusted Budget	0	0	0	0
Total Spend	0	0	0	0

*The Advancement Communications program does not have its own budget. Projects produced by the Assistant Director for Advancement Communications are funded on a case by case basis. For example, a direct mail piece for prospective planned giving donors would be paid through the planned giving budget. A case statement for support of a new home for Special Collections and Archives would be paid through the fundraising budget for that particular campaign.

The following success outcomes and key performance indicators are listed consecutively by each unit within the Advancement Support group (not in order of importance):

Success Outcome 1: New Prospect Identification

The Advancement Research & Prospect Management staff help increase private support to WSU by identifying potential sources of funding. In order to successfully approach and cultivate new and existing donors, front line staff need an ongoing pipeline of new prospects.

KPI 1.1 – Newly Identified Suspects

Data: When new potential prospects are first identified, they are tagged as Suspects in the Banner prospect management system. This is a new tracking system created in FY18 as part of a complete overhaul of our prospect management system.

Result: In FY18, we created 4,631 new Suspect tracks.

Response/Action Plan: We have dedicated two days per week to working through this list to identify new Discovery Prospects for frontline fundraisers. We will continue to add new Suspects to the prospect pool, as well. Eventually, the creation of new Suspect tracks will be a valuable metric to our work.

KPI 1.2 – Researched and Newly Identified Discovery Prospects

Data: When Suspects or other new targets are researched by ARPM staff and deemed valid prospects with both capacity and propensity, they are coded as Discovery prospects in the Banner prospect management system and assigned to a major gift officer for qualification and cultivation.

Result: The table below shows how many newly discovered prospects we have had per fiscal year. In FY16 and FY17, we were closing out Rise.Shine., so we were not focused on new prospect identification.

Fiscal Year	FY16	FY17	FY18
New Discovery	99	117	156

Response/Action Plan: We have dedicated two days per week to working through our new Suspect list to identify new Discovery Prospects for frontline fundraisers.

Success Outcome 2: Prospect Research & Management

Frontline fundraisers need accurate information on existing prospects, be they alumni, friends, companies, or organizations. **ARPM** also coordinates the tracking of relationship management with donors and prospects through the cycle of identification, cultivation, stewardship, and repeated cultivation.

KPI 2.1 – Prospect Upkeep

Data: Banner has an array of data points that must be kept up-to-date in order to accurately track and report prospect assignments. Chief among those data points are each prospect’s status, assigned staff, and potential giving interests (projects).

Result: Below is a table indicating the number of such updates made each fiscal year to prospect records.

Update Type	FY16	FY17	FY18
New Statuses	536	1,113	11,635
New Assignments	2,044	1,329	6,149
New Projects	624	1,086	5,383
Grand Total	3,204	3,528	23,167

Response/Action Plan: We had a significant increase in FY18 due to a complete overhaul of our prospect system. We will continue to maintain prospect records as needed, performing various clean-up tasks on a semi-annual basis.

KPI 2.2 – Research Comments

Data: Research notes are stored as free text comments in Banner. These comments help inform frontline staff on a prospect’s biographical and financial data.

Result: Below is a table showing the number of Comments entered in Banner per Fiscal Year. In Banner, comments can be added for both Prospects (AMACOMT) and Non-Prospects (APACOMT). Of particular interest is the number of Comments entered for Prospects.

Comment Type	FY16	FY17	FY18
Prospect	298	175	418
Non-Prospects	1880	1540	1653
Grand Total	2178	1715	2071

Response/Action Plan: We have dedicated two days per week to researching new prospects, which includes entering new Comments.

KPI 2.3 – Number of Prospects Researched

Data: Here we are looking at the raw number of unique prospects for whom comments have been entered in Banner on AMACOMT.

Result:

Fiscal Year	FY16	FY17	FY18
Prospects Researched	155	97	186

Response/Action Plan: We have dedicated two days per week to researching new prospects.

Success Outcome 3: Business Intelligence

KPI 3.1 – Research Reports

Data: ARPM creates a variety of regular reports to provide detailed statistical views of fundraising activity so that leadership may identify strengths and opportunities.

Result: These reports have included:

- Monthly campaign reports & executive summaries;
- Semi-Annual clean-up of prospect pool;
- Gift officer performance metrics;
- Refining calling and mailing segments for Annual Giving and other appeals; and
- Weekly reports of new prospects and contact reporting stats (new in FY18).

Response/Action Plan: We will continue to develop reports to respond to client needs.

KPI 3.2 – IS Reports

Data: The Information Services unit is responsible for writing code & queries to generate a wide variety of standard (weekly/monthly) and ad hoc reports for clients both within Advancement and across campus.

Result: IS Reporting counts by fiscal year are as follows*:

Fiscal Year	FY16	FY17	FY18
Reports generated	282	279	165

*It is important to note that during FY16, I.S. had a 3-person staff (FTE); in FY17, I.S. had 1 full-year position, 1 two-month position, and 1 six-month position; and for FY18, I.S. is staffed with only 1 person (FTE).

Response/Action Plan: We will continue to develop reports to respond to client needs.

Success Outcome 4: Client Satisfaction

ARPM/IS is dedicated to exceeding expectations of our colleagues in Advancement. In December 2017, we sent a survey to the entire division to rate satisfaction with research reports (ARPM) and data reports (IS).

KPI 4.1 – Satisfaction with Research Reports

Data: Client satisfaction was ranked on a five-point scale, ranging from extremely satisfied to not at all satisfied.

Result: 58.8 percent were extremely satisfied, and 41.8% were very satisfied. No one was somewhat satisfied, not so satisfied, or not at all satisfied.

RESULT	CY2017
Extremely satisfied	58.8
Very satisfied	41.8
Somewhat satisfied	0
Not so satisfied	0
Not at all satisfied	0

Response/Action Plan: We will continue to survey clients annually and will also investigate the use of a system to track research requests and survey the results in real time.

KPI 4.2 – Satisfaction with IS Reports

Data: Client satisfaction was ranked on a five-point scale, ranging from extremely satisfied to not at all satisfied.

Result: 47.3 percent were extremely satisfied, and 52.63% were very satisfied. No one was somewhat satisfied, not so satisfied, or not at all satisfied.

RESULT	CY2017
Extremely satisfied	47.3
Very satisfied	52.6
Somewhat satisfied	0
Not so satisfied	0
Not at all satisfied	0

Response/Action Plan: We will continue to survey clients annually and will also investigate the use of a system to survey the resulting output in real time.

Success Outcome 5: Big Data Analysis

ARPM has instituted and maintained a number of large scale data initiatives each year to enhance business intelligence for our division, allowing us to prioritize our fundraising efforts. This has included:

- **WSUE Engagement Scores** – In FY16, we created the WSUE scoring system (WSU Engagement Score) which tracks how engaged alumni and friends have been in the life of the University. Initially, 192,203 records were given the scores (ranging from 0 to 23) but now the scores are automatically generated by a formula that we are continuing to adjust.
- **W-OPS Score** – In FY17, we created the W-OPS scoring system (WSU Organization Partner Score) which tracks and scores those organizations that have had the greatest impact at WSU, through such actions as donations, research grants, vendor contracts, and recruitment. We added W-OPS scores to 1,290 organizational records.
- **Donor Modeling** – In FY18, we coded 199,728 alumni and friend records with three new donor model scores (ranging from 100 to 999) gauging an individual’s likeliness to give an annual gift, major gift, or planned gift.

Success Outcome 6: Alumni Demographics

In order to effectively engage alumni, the University needs updated information on our constituents.

KPI 6.1 – UID Matching

Data: One particularly important data point is related to employment. As such, **ARPM** has contracted with a vendor to sync LinkedIn data on our alumni with the Banner system.

In order to bridge the gap between LinkedIn and Banner, we must match records between the two systems. Unfortunately, this is often a manual process as names, grad years, and majors often don't exactly match between the two systems. Each year, we receive a new batch of records from LiveAlumni and must match data between the two systems.

Result: The following indicates the number of new records that were matched manually. New student workers in FY17 identified our backlog of records. In FY18, we manually matched an update batch from LiveAlumni.

	FY16	FY17	FY18
# Records Manually Identified	3,637	15,029	5,300

Response/Action Plan: Each year, LiveAlumni provides refreshed data from LinkedIn, featuring new profiles or updated profiles. We will continue to match new records as needed.

KPI 6.2 – Database Updates

Data: Changes to other alumni and constituent information are updated routinely in the Banner system.

Result: The following tables indicate the number of updates made by data point, by fiscal year.

	FY16	FY17	FY18
Telephone	2192	3171	1736

	FY16	FY17	FY18
Address	1759	2354	2005

	FY16	FY17	FY18
Name Changes, Marital Status, New Records	1518	1846	816

	FY16	FY17	FY18
Email	602	1412	552

	FY16	FY17	FY18
Date of Birth, Date of Death	1068	912	884

*The decrease in updates from FY17 to FY18 is directly related to the conclusion of the Rise.Shine. Campaign, as many updates were obtained as a result of special mailings and events that occurred to support the campaign.

Response/Action Plan: We will continue to take a proactive approach to data acquisition.

Success Outcome 7: Gift Acceptance & Management

Our **Donor Stewardship** program focuses on the reactive, or required, actions of gift acceptance and management, and reporting. Gift acceptance and management includes oversight of Foundation scholarship funds through our Scholarship Manager (SM) awarding system.

KPI 7.1

Data: The chart below details awards made through the SM system, and the number of applications submitted (completed) and non-submitted (not completed). The awarding process is done in collaboration with the Office of Financial Aid (OFA) and a myriad of college and unit review committees.

	FY16	FY17	FY18	FY19 (to date)
Dollars awarded	\$2,234,649.00	\$2,266,175.00	\$1,875,303.00	\$1,436,362.00
Number of awards	1,213	1,237	1,170	1,020
Applications submitted	3,327	3,553	2,800	3,332
Applications non-submitted	2,388	2,219	2,599	2,769

Result: For FY18, low application numbers were due to the abrupt and unexpected decision by OFA to change the application due date six weeks earlier than past years with very little communication to students and colleges. Continuing incoming numbers were down considerably. For FY19, not all awards have been made, including those for the Boonshoft School of Medicine (BSOM).

Response/Action Plan: We know from reports in the SM system that the vast majority of non-submitted applications stop at the essay.

KPI 7.2

Data: The chart below details endowment and scholarship reporting.

	FY16	FY17	FY18	FY19
Endowment reports	334	361	NA: done in Fall 2018	TBD
Scholarship reports	50-100	50-100	NA: done in Fall 2018	TBD

Result: As reporting is done in the fall, we can only analyze numbers from FY16 and FY17. If a fund is endowed, scholarship reporting is included in the endowment report. Reporting for annual scholarship funds are done as needed, anywhere from 50-100 per year. BSOM does their own endowment reporting and those numbers are not included in the above data. We do not report on program funds as there is little to no data coming back from the colleges and units as to how those funds were spent, if they were spent at all.

Response/Action Plan: Continue to provide reports to donors.

Success Outcome 8: Donor Acknowledgement & Recognition

Our **Donor Relations** program focuses on the proactive, or desired, interactions of acknowledgement and recognition. For our program, acknowledgement is the action of thanking the donor via letter or call. Our colleagues in Advancement Services use the term acknowledgement interchangeably with a tax receipt (which they issue), where we do not.

KPI 8.1

Data: The chart below details the number new and major donors that received a letter or call of gratitude for their financial support. Major donors in our program are gifts of \$1,000 and up. New donors currently reflect individuals only, no community partners (corporations, organizations, etc.) and do not include memorial gifts. These numbers reflect only those touches generated through donor relations. i.e. they do not include anything coming from the colleges or units, or Annual Giving (specifically for the Campus Scholarship and Innovation Campaign, or CSIC).

	FY16	FY17	FY18	FY19
New donor	1,310	852	881	TBD
Major donor	1,046	951	931	TBD

Result: A significant amount of donors not receiving additional gratitude are those giving gifts of \$999 and under.

Response/Action Plan: Gifts of \$999 and under in FY19 will now be sent under the signature of a donor relations staff person. Develop an audit of what each college and unit are doing for their acknowledgement efforts.

KPI 8.2

Data: The chart below details the number new Heritage Society members – a lifetime giving society which begins at \$10,000. These numbers include truly new members, or those that are moving up to a higher level of giving. These numbers include individuals and community partners (corporations, organizations, foundations, etc.)

	FY16	FY17	FY18	FY19
Number of new Heritage level donors	151	129	109	TBD

Result: FY19 numbers have not been calculated or reviewed. This is done after all FY18 gifts have been entered and in late July our Information Services works with CaTS on a report to calculate this data.

Response/Action Plan: Secure the data necessary to document new Heritage Society Members.

KPI 8.3

Data: The chart below details the number of attendees at donor engagement and campaign events. These numbers include recognition events such as Legacy of Giving (Heritage and Katharine Wright Legacy, or KWLS, society members) and CSIC President's Club reception; engagement events such as our annual All Stars Movie (annual giving and Alumni Association gold members) and those specifically for KWLS; and campaign events for *Rise. Shine. The Campaign for Wright State University* and *Discover Your Story: The Campaign for the Wright State University Archives Center*. This data does not include any regional *Rise. Shine.* events as

they were coordinated in the Alumni Office, nor any events that were coordinated through any of the colleges or units.

	FY16	FY17	FY18	FY19
Attendees at donor engagement & campaign events	901	684	410	NA

Result: For FY19, no engagement events are scheduled until fall 2018. *Rise. Shine.* campaign events concluded in FY17 and no recognition events were held in FY18 to reflect the University’s austerity measures. We discovered we are missing out on engagement opportunities for large populations of donors including 1) our annual, non-faculty/staff/retiree donors of \$1,000 and up (First Flight); 2) our loyal donors who have given three years or more; 3) our community partners not inducted into an annual Heritage society; and 4) existing Heritage society members who are not moving up in cumulative giving levels.

Response/Action Plan: Develop an audit of what each college and unit are doing for their engagement efforts and include it in the recently developed engagement plan for all donors including those we recognized as missed in previous years. Specific goals for year one include yearly informational touch points with messages of gratitude for their continued support, engagement of select community partner and individually named funds and their scholarship recipients, roll out of new “concierge services” and engagement opportunities for Heritage society members. Years two and three include integration of a quarterly donor email, student thank-a-thons, annual Presidential communication (letter) and more specialty engagement opportunities at the highest levels of our Heritage societies and loyalty giving.

Success Outcome 9: Stakeholder Communications

Advancement Communications showcases the excellence of Wright State University to inspire others to give. This is accomplished through a variety of stories, case statements for support, donor proposals, brochures, direct mail pieces, and videos. Collaborates with other Advancement staff to ensure that there is consistent messaging and branding for all Advancement and Foundation materials.

KPI 9.1

Data: The following data represents the number of unique projects created to support the communications and marketing efforts of University Advancement and the Wright State University Foundation. Projects range from writing stories about donors and scholarship recipients to show the impact of giving to creating a direct mail appeal to raise money for the Foundation Board of Trustees scholarship.

Result:

	FY16	FY17	FY18
# Unique Projects	44	57	44

Response/Action Plan: There was a slight decline in the number of projects between FY17 and FY18. *Rise. Shine. The Campaign for Wright State University* closed at the end of FY17, and we were very conscientious about spending as little money as possible during FY18.

Success Outcome 10: Presidential Communications

The Assistant Director for **Advancement Communications** also serves as the speech writer for the President of Wright State University, and prepares any other presidential messages and correspondence as requested. This provides a consistent voice and messaging to students, faculty, staff, alumni, donors, and external partners.

KPI 10.1

Data: The following data represents the number of speeches, Power Point presentations, messages, and correspondence prepared for the President’s office.

Result:

	FY16	FY17	FY18
# Speeches, Messages and Correspondence	82	39	141

Response/Action Plan: FY17 was an unusual year for presidential speechwriting and does not represent the typical amount of work involved with these duties. During the last few months of President Hopkins’ tenure, there was not nearly as much speechwriting required, and no speeches were requested by Interim President McCray.

Success Outcome 11: Digital Communications

Advancement Communications oversees the website for University Advancement and the Wright State University Foundation, ensuring that all information is current and up-to-date on wright.edu/giving. Creates content for the Foundation’s Facebook, Twitter, and Instagram accounts to keep our stakeholders informed about current events and achievements by Wright State faculty, staff, students, and alumni. Shares stories online and via social media to demonstrate how donors’ gifts are being utilized for the good of our students and community.

KPI 11.1

Data: The following data represents the number of page views on wright.edu/giving.

Result:

	FY16	FY17	FY18
# Page Views	N/A	2,229	10,087

Response/Action Plan: In March 2017, a new website was launched for University Advancement and the Wright State University Foundation. The Assistant Director for Advancement Communications spearheaded this project in collaboration with Wright State University’s Office of Marketing and other members of the Advancement team.

Prior to that time, Snively Associates, an external consultant, maintained a website for *Rise. Shine. The Campaign for Wright State University*. This also served as the primary website for University Advancement and the Wright State University Foundation. We do not have statistics for this website, since it was designed by an external consultant and maintained on an outside server.

KPI 11.2

Data: The following data represents the number of followers on the social media accounts for University Advancement and the Wright State University Foundation. This includes Facebook, Twitter, and Instagram.

Result:

	FY16	FY17	FY18
# Social Media Followers	4,668	4,643	4,779

Response/Action Plan: With social media algorithms constantly changing, especially on Facebook, it is highly recommended that we devote some funding to social media advertising. We did this during the earlier stages of the *Rise. Shine.* campaign and it helped to expand our audience.