

Department/Unit: Development/Advancement **Year:** 2018
Contact Name: Bill Shockley **Contact Title:** Executive Director Major Gifts

Unit Overview/Mission/Purpose

The Development Program builds trust based relationships with our external customers (Alumni, Friends, Corporations, Foundations, Benefactors) by engaging them in the life of the university and the strategic vision of our internal customers (university leadership, academic leadership, program directors, faculty, and staff) for the purposes of obtaining philanthropic support to enhance mission outcomes.

Staffing

	FY16	FY17	FY18	FY19
# Full Time Staff	13	12	10	8
# Student Employee FTE	96	8	8	8

Success Outcome 1:

Meet or exceed established metrics as it relates to gift activity.

KPI 1.1 Contacts Made

Data: The total number of contacts made by the Development Program related to gift solicitation strategies.

Result: Recognizing that the type of contact falls within the continuum of the donor life cycle where the donor experience generally starts through mass communication and becomes more personalized as their giving increases, the fundraising areas will make contacts via mass communications and personal contacts depending on the appropriate strategy for each constituent. Annual fund contacts will comprise a mix of email, direct mail, digital, and phone contacts made during the course of the fiscal year. Each individual development officer within the other fundraising departments will be responsible for individual contact and donor visit goals totaling 150-200 per year. The resulting combined figure is an indication of solicitation activity which will result in a pipeline of gifts. Progress is monitored weekly, quarterly, annually and by project.

Response/Action Plan: Adjustments to activity are made as events, projects and responses warrant including proposal preparation, solicitations and gift acknowledgements. New donors through Annual Fund vehicles are screened for further contact by the major gift staff.

KPI 1.2 Proposals Delivered

Data: The total number of asks, solicitations and proposals delivered.

Result: Each individual development officer has a solicitation goal of 10 -12 per year based on current donor status. Annual Giving utilizes multiple solicitation vehicles to solicit annual gifts from over 108,000 alumni, friends and students. The cumulative program result is an indication of successful solicitation strategy implementation and total dollars raised success.

Response/Action Plan: Solicitations strategies are fluid and driven in large part by responding to an individual donor's emotional response to their engagement/solicitation experience, responding to variables such as the donor's emotional response, satisfaction of engagement experience, and strength of mission match. Adjustments are made after each contact.

KPI 1.3 Dollars Raised

Data: The total number of philanthropic dollars received by the Development Program.

Result: Each individual development officer projects the successful outcome of their solicitation strategies. The Office of Planned Giving has a projection of planned gifts realized The Office of Annual Giving has individual goals per solicitation campaign and giving platform/vehicle. The cumulative results, plus any unanticipated gifts realized, is reported in the annual results.

Response/Action Plan: While contact activity is an indication of anticipated solicitations, and solicitations are an indication of potential success in dollars raised, there is not always a 1:1 correlation. Successful results in this KPI are dependent on a clear and compelling vision from university leadership and can be negatively impacted by donor life cycles and less than positive university publicity.

Success Outcome 2:

Identification, cultivation and stewardship of philanthropic relationships.

KPI 2.1 Number of Managed Prospects

Data: Each individual development officer is expected to maintain a portfolio of philanthropic relationships based on the complexity of those relationships. The total number of managed relationships influences the activity levels as described in Success Outcome 1.

Result: The total number of those relationships is reported weekly by Advancement Research and Prospect Management (ARPM) The dollar value of those relationships as rated by the program is also reported.

Response/Action Plan: Action plans include strategies to qualify new prospects as they are brought forward by ARPM and discovered through solicitation activity.

KPI 2.2 Number of New Relationships

Data: New philanthropic relationships must continually be added to the portfolio of activity. There are individual goals for each development officer as well as result expectations for Annual Giving solicitation campaigns.

Result: The number of new managed prospects is monitored weekly. The metrics are derived from newly discovered prospects via development officer activity, ARPM research, Annual Fund solicitation campaigns and platforms.

Response/Action Plan: Qualification is an ongoing process.

KPI 2.3 Number of New and Reactivated Donors

Data: Annual program wide increase in number of donors, number of new donors and number of reactivated donors.

Result: The number of reactivated donors are monitored monthly. The result of solicitation activities across all giving platforms is analyzed annually (or in some cases by solicitation campaign) and reported using an in depth analysis provided by ARPM.

Response/Action Plan: Fiscal year trends can be analyzed and results can be compared to cumulative activity levels