

CALIFORNIA STATE UNIVERSITY, FRESNO

1911-2011



STEPPING INTO OUR NEXT CENTURY

Advancement Division Action Plans

FY 2010-11 and FY 2011-12

Corporate and Foundation Relations



CALIFORNIA STATE UNIVERSITY, FRESNO
University Development FY 2010-11 / 2011-12 Action Plan Details

Department: Corporate and Foundation Relations

Date: September 2010

Priority/Product	Criteria for Success	Tactics	Special Considerations
<p>Major Gift Opportunities from Corporations and Foundations</p>	<ul style="list-style-type: none"> • Develop relationships with potential corporate and foundation funders, both regionally and nationally. • Continue to review school priorities and look for best matches from foundations for those projects. • Support campus units in submitting proposals for campus priorities. • Continue to build portfolios of viable organizational prospects, beyond those being managed by colleagues in campus units. • Mainstream contact information between CFR office and local corporate and foundation entities. – Ongoing. • Develop strategies to visit or talk with foundations that are not currently accepting proposals. 	<ul style="list-style-type: none"> • Maintain and update master prospect list to track new and existing funders. • Focus especially on funders with potential for more than one campus program. • Make contacts and build relationships to generate proposal opportunities. Submit Letters of Inquiry (LOI's) and proposals. • Record a minimum of 150 substantive reports of contact. • Assist Directors of Development with unit-specific projects where requested. • Request visits to foundations from President/Sr. Leadership/CFR Director. 	<ul style="list-style-type: none"> • Continue to assist Directors of Development to build relationships and develop local contacts for their units. • Staffing changes will affect the rate of progress on various initiatives.
<p>Funding for campus-wide and multi-college campaign projects</p>	<ul style="list-style-type: none"> • Additional resources for: <ul style="list-style-type: none"> ○ Richter Center for Community Engagement and Service Learning ○ Central Valley Higher Education Consortium ○ Central California Children's Institute 	<ul style="list-style-type: none"> • Meet with project teams to understand the projects and strategize about prospective organizational funders. • Prepare proposals as appropriate. 	<ul style="list-style-type: none"> • Other Directors of Development are also involved in these projects. <p style="text-align: right;">(continued)</p>

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<p>Coordination with the Office of Research and Sponsored Programs.</p>	<ul style="list-style-type: none"> • Regular communication, increasing collaboration and shared information regarding corporate and foundation grants and giving opportunities. • Ongoing review of CFR prospect list and the SAR's report for collaboration, partnership and communication. 	<ul style="list-style-type: none"> • Proactive information sharing meetings to discuss funding opportunities as needed or requested. • Review of information about private grants handled by ORSP for campaign countable philanthropic funds. 	<ul style="list-style-type: none"> • Explore and define how CFR and ORSP can best help the campus community with small philanthropic grant requests (in addition to major gift grants).
<p>Database Management and Maintenance</p>	<ul style="list-style-type: none"> • Oversee the work to: <ul style="list-style-type: none"> ○ Identify and update corporate hierarchy with corporate records and contacts who have multiple branches. ○ Posting and tracking CFR proposals on Advance database. Assist Directors of Development with foundation and corporate proposals. ○ Clean up records in Advance Database. 	<ul style="list-style-type: none"> • Work with Data Entry staff to review updates and strategy. • Identify primary contacts and eliminate outdated records. 	