

CALIFORNIA STATE UNIVERSITY, FRESNO  
1911-2011



STEPPING INTO OUR NEXT CENTURY

## **Advancement Division Action Plans**

**FY 2010-11 and FY 2011-12**

# **Donor and Volunteer Relations**



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

**Department: Donor and Volunteer Relations**  
**Date: September 2010**

Priority/Product	Criteria for Success	Tactics	Special Considerations
<b>Encourage and sustain volunteer involvement</b>	<ul style="list-style-type: none"> <li>• Strengthen the bond between the University and volunteers.</li> <li>• Volunteer lists will be current and updated on Advance.</li> </ul>	<ul style="list-style-type: none"> <li>• Invite VIP volunteers to Fresno State events.</li> <li>• Invite volunteers to engage with students in a classroom setting.</li> <li>• Engage volunteers with key faculty.</li> <li>• Engage volunteers in acknowledging donors by phone or via personal notes.</li> <li>• List members of volunteer boards on the Web.</li> <li>• Encourage involvement by “Next Generation.”</li> </ul>	<ul style="list-style-type: none"> <li>• Meaningful engagement will be different for each volunteer.</li> <li>• Collaboration with DoDs.</li> </ul>
<b>National Board of Visitors</b>	<ul style="list-style-type: none"> <li>• Continue President’s Forum Weekend to be held in spring 2012.</li> <li>• Create stronger relationships with the NBoV based on each member’s interests.</li> </ul>	<ul style="list-style-type: none"> <li>• Assist with scheduling personal contacts between the President and NBoV members.</li> <li>• Develop personal experiences for the volunteers, such as meeting with the President, faculty and students.</li> <li>• Engage faculty and students in President’s Forum Weekend. Develop presentations around campaign projects.</li> </ul>	<ul style="list-style-type: none"> <li>• NBoV assists the President in creating a favorable climate for private giving.</li> <li>• Continue close working relationship with the Office of the President for correspondence and scheduling.</li> <li>• Keep DoDs informed of NBoV visits to campus and with the President.</li> </ul>
<b>Presidential Roundtables / Receptions</b>	<ul style="list-style-type: none"> <li>• Schedule three or more roundtables each fiscal year.</li> <li>• Encourage volunteers to host and play an integral part in recruiting guests.</li> <li>• Target participants who represent diversified connections to the university, especially potential donors.</li> </ul>	<ul style="list-style-type: none"> <li>• Assist with preparation and facilitation of sessions.</li> <li>• Track invitees and participants on Advance and add to the annual fund and magazine lists.</li> <li>• Forward feedback to DoDs for follow-up when necessary.</li> <li>• Ask DoDs for additional invitees.</li> <li>• Work in collaboration with Prospect Research.</li> </ul>	<ul style="list-style-type: none"> <li>• Will inform alumni and friends not connected with the university.</li> </ul> <p style="text-align: right;">(continued)</p>

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<b>Campaign Leadership Committee</b>	<ul style="list-style-type: none"> <li>• Include in cultivation and recognition activities.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to involve in the President’s Forum Weekend and Pinnacle Society Dinner.</li> <li>• Assist with providing content for Campaign Insider E-Newsletter.</li> </ul>	<ul style="list-style-type: none"> <li>• Most support provided by the Assistant to the AVP for Development.</li> </ul>
<b>Complement DoD efforts in the development of their respective Campaign Committees</b>	<ul style="list-style-type: none"> <li>• Each college/campus unit to activate a volunteer committee with fundraising focus.</li> </ul>	<ul style="list-style-type: none"> <li>• Work with development staff to facilitate and track volunteer assignments and activities.</li> </ul>	<ul style="list-style-type: none"> <li>• Some Campaign Committees are more developed than others.</li> </ul>
<b>Continue acknowledgment letter procedures</b>	<ul style="list-style-type: none"> <li>• Update college and program acknowledgment letter templates.</li> <li>• Continue to work closely with Data and Information Services to generate accurate and timely receipts.</li> <li>• Send out annual payroll deduction receipts and accompanying acknowledgment letters.</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh presidential acknowledgment letters, including President’s Fund letters by the beginning of each fiscal year.</li> <li>• Work with DoDs, review and write new templates for use by July 1.</li> <li>• Payroll deduction information determined and formatted by mid January. Letters and receipts to be proofed, printed and mailed by January 31.</li> </ul>	
<b>Continue production of Donor Honor Roll</b>	<ul style="list-style-type: none"> <li>• Work with University Communications to publish Web Honor Roll - listing donors at giving levels.</li> <li>• Highlight donors and how their gifts make a difference on the Campaign website.</li> </ul>	<ul style="list-style-type: none"> <li>• Web Honor Roll and Centennial Donor Lists - August.</li> <li>• Produce Centennial Society donor list. May be included in the Fresno State Magazine.</li> <li>• Include commemorative gifts.</li> <li>• Include Heritage Society and President’s Circle for Excellence Donors.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaborative project with University Communications.</li> </ul> <p style="text-align: right;">(continued)</p>

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<b>Endowment Reporting</b>	<ul style="list-style-type: none"> <li>• Continue centralized system for annual distribution of Endowment Status reports to donors and living relatives in a timely manner.</li> <li>• Load all new endowment agreements into Advance.</li> </ul>	<ul style="list-style-type: none"> <li>• Distribute reports by the end of October.</li> <li>• Confirm information regarding endowed funds.</li> <li>• Track endowment information in Advance using the Stewardship tab.</li> <li>• Data and Info. Services to work with ITS on student recipient data for reports.</li> <li>• Work closely with the Scholarship Office regarding student scholarship information and confidentiality.</li> </ul>	<ul style="list-style-type: none"> <li>• Reports may be mailed later due to Foundation review and approval of financials.</li> <li>• Collaborative project with Foundation, Accounting and Scholarship Office.</li> <li>• Some cases may require special handling, for example if certain information must be included because of a donor stipulation.</li> </ul>
<b>Continue to develop and refine process and policy for scholarship reporting and student thank you letters</b>	<ul style="list-style-type: none"> <li>• Administer and track student acknowledgments.</li> <li>• Mail letters to donors/stewardees.</li> </ul>	<ul style="list-style-type: none"> <li>• Letters to be sent to Donor and Volunteer Relations for review.</li> <li>• Letters to be mailed to donors/stewardees from Donor and Volunteer Relations.</li> <li>• Enter new recipient information in Advance.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaboration with the DoD for Student Affairs.</li> </ul>
<b>Pinnacle Society</b>	<ul style="list-style-type: none"> <li>• Continue Pinnacle in spring. Continue research of gift amounts to confirm donor categories.</li> <li>• Solidify Pinnacle membership guidelines.</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage folks to attend by sending save the date cards in January.</li> <li>• Review all Pinnacle Society data for accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>• Highlight top donors in the President's speech, i.e., personal background and the impact of their support.</li> </ul>

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<b>Donor Recognition Events</b>	<ul style="list-style-type: none"> <li>• Develop save the date and special invitations to join existing events for annual contributors of \$10,000 plus.</li> <li>• Continue Donor Appreciation Reception for annual individual contributors of \$2,500 plus.</li> </ul>	<ul style="list-style-type: none"> <li>• Special letter from the President mailed in August notifying \$10,000 plus donors of special invitations they will receive throughout the year.</li> <li>• Donor Appreciation Reception to be held in spring. Invitations to be mailed no later than six weeks in advance. Research to begin in January.</li> </ul>	<ul style="list-style-type: none"> <li>• Exclude athletic donors who receive tickets/parking/suites, unless they exceed \$10,000 in giving (hard credit). (Note: This will eliminate Green V Donors at the \$10,000 level due to the 80/20 rule.)</li> </ul>
<b>General Events</b>	<ul style="list-style-type: none"> <li>• Continue working with the President's Office to cultivate and steward donors in the SaveMart Center University Suite.</li> <li>• Oversee all invitations for the president's box for football.</li> <li>• Oversee all invitation lists for the university suite for basketball.</li> </ul>	<ul style="list-style-type: none"> <li>• Include collaboration with DoDs to suggest prospects/donors for the SMC suite and football box, track on Advance.</li> <li>• Collaborate with Prospect Research on bio summaries of attendees.</li> </ul>	<ul style="list-style-type: none"> <li>• Inform DoDs of suite attendance.</li> </ul>
<b>"In Honor Of" and "In Memory Gifts"</b>	<ul style="list-style-type: none"> <li>• Continue tracking of commemorative gifts to ensure that family members are notified.</li> <li>• Feature commemorative donations on the web.</li> </ul>	<ul style="list-style-type: none"> <li>• Follow-up with DoD administrative assistants to ensure family members are notified. Assist when necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• Work with DoDs and assistants to make sure that all gifts made "in honor of" or "in memory of" are noted as such on GRTs.</li> </ul>
<b>Endowment Review</b>	<ul style="list-style-type: none"> <li>• Review 10 random endowments to ensure donor intent is being followed.</li> </ul>	<ul style="list-style-type: none"> <li>• Work with Foundation and University staff as needed for clarification.</li> <li>• Review to begin in June.</li> </ul>	<ul style="list-style-type: none"> <li>• This responsibility may be transferred to an external CPA firm.</li> </ul>