

CALIFORNIA STATE UNIVERSITY, FRESNO
1911-2011



STEPPING INTO OUR NEXT CENTURY

Advancement Division Action Plans

FY 2010-11 and FY 2011-12

Prospect Research



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

Department: Prospect Research
Date: September 2010

Priority/Product	Criteria for Success	Tactics	Special Considerations
Requested Research	<ul style="list-style-type: none"> • Provide appropriate, accurate and timely information to DODs, deans, university president and other key administrators. • Develop strong working relationships with DODs, Alumni Association, Athletics, etc. 	<ul style="list-style-type: none"> • Determine depth of research to be conducted based on the prospect development cycle. • Meet project deadlines and answer research questions in a timely manner. • Provide information and updates on prospects and key volunteers. • Through coordination with colleagues, provide news and financial information on top prospects. • Participate in prospect strategy discussions to help increase fundraising success. 	<ul style="list-style-type: none"> • Ask for feedback from the information recipients. • With reduced staff, may have to set stricter priorities for research requests. • Dependent upon volume.
Proactive Research	<ul style="list-style-type: none"> • Identify and provide information on prospects: Research Department is regarded as the “eyes and ears” of the organization. • Identify major gift prospects. • Assist in prospect ratings. 	<ul style="list-style-type: none"> • Employ media alerts and other proactive strategies to identify alumni and other potential donors and key volunteers. • Read trade journals, <i>Wall Street Journal</i>, <i>The Fresno Bee</i>, <i>The Chronicle of Philanthropy</i>, <i>The Business Journal</i>, etc. • Follow business and economic trends to understand how these might impact prospects. • Review and disseminate electronic and print media to appropriate DODs. • Provide individual, company, and foundation profiles. • Collaborate with DODs and other fundraisers on proactive research projects. • Utilize wealth screening results: <ul style="list-style-type: none"> ○ Verify wealth screening data to qualify or disqualify individuals as major prospects. ○ Provide appropriate information on qualified individuals to DODs. 	<ul style="list-style-type: none"> • Dependent upon volume. <p style="text-align: right;">(continued)</p>

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Information Management	<ul style="list-style-type: none"> • Provide prospect information that is accessible and easy to use. 	<ul style="list-style-type: none"> • Use a format that is easy to input and review by recipient. • Maintain data integrity by updating system with new information. • Establish geographic lists. • Enter bio information and media articles into Advance database and notify DODs of news relevant to their prospects. • Implement use of Advance clipboards for new list projects and import existing Excel lists into clipboards as appropriate. • Complete data clean-up projects: <ul style="list-style-type: none"> ○ Work with data entry clerks to clean up and correct database information. • Institute use of Prospect and Proposal Management Systems: <ul style="list-style-type: none"> ○ Work with DODs to maintain current status of prospects and proposals. 	
Training and Education	<ul style="list-style-type: none"> • Professional development. 	<ul style="list-style-type: none"> • Pursue professional development and training opportunities: <ul style="list-style-type: none"> ○ Attend Research conferences, seminars, webinars, etc. ○ Participate in intra-departmental training as needed. ○ Pursue database training as needed: Advance, WealthEngine, Hoovers, Selectory, Foundation Directory Online, etc. • Maintain a current knowledge of campus/school programs and their fundraising priorities. 	<ul style="list-style-type: none"> • Off-campus training is suspended due to budget constraints.
Marketing	<ul style="list-style-type: none"> • Develop creative and informative ways to educate and inform staff about the value of Research. 	<ul style="list-style-type: none"> • Provide Research orientation to new Fresno State advancement staff or others requiring such information. • Update DODs on new or improved Research capabilities and services, as relevant. 	(continued)

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Assessment	<ul style="list-style-type: none"> • Monitor the impact of Research on fundraising productivity. 	<ul style="list-style-type: none"> • Conduct a survey of DODs and key administrators to evaluate Research information: <ul style="list-style-type: none"> ○ Integrity of data disseminated. ○ Timeliness of information. • Select, evaluate and purchase appropriate research tools to optimize efficiency and productivity. 	<ul style="list-style-type: none"> • With reduced staff, a survey is currently a low Research priority. • Maintaining all tools is dependent on budget.