

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

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

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

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