

CALIFORNIA STATE UNIVERSITY, FRESNO

1911-2011



STEPPING INTO OUR NEXT CENTURY

## **Advancement Division Action Plans**

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

# **University Development - Overview**



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

**Department: University Development – Overview**

**Date: September 2010**

<b>Priority/Product</b>	<b>Criteria for Success</b>	<b>Tactics</b>	<b>Special Considerations</b>
<b>The Campaign</b>	<ul style="list-style-type: none"> <li>• Strong public presence for Campaign, integrated with the Centennial during 2010-11</li> <li>• Promotional materials available in flexible formats</li> <li>• Actively engaged volunteers</li> <li>• Full Development staff team in place</li> <li>• Best Practice operations</li> </ul>	<ul style="list-style-type: none"> <li>• Active involvement of volunteers</li> <li>• Continue extensive prospecting and outreach</li> <li>• Continue regular campaign reporting to monitor progress against goals</li> <li>• Integrate Campaign messages and strategies with Centennial activities</li> </ul>	<ul style="list-style-type: none"> <li>• Continue working to create the Culture of Philanthropy on and off campus.</li> <li>• Budget cuts continue to impact operations.</li> <li>• Distractions need to be reduced.</li> </ul>
<b>Intensified Fundraising</b>	<ul style="list-style-type: none"> <li>• Major commitments for identified priorities</li> <li>• Achievement of dollar goals: FY10/11 - \$21M for annual counting and \$174M in cumulative campaign counting; FY11/12 -\$23M annual and \$200M campaign</li> <li>• Effective coordination among all campus units</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on viable priorities</li> <li>• Garner 5- and 6-figure gifts, as well as 7- and 8-figure commitments</li> <li>• Pursue leadership annual gifts as a prelude to major gifts in the future</li> <li>• Hold to high standards for quality of efforts in cultivation and solicitation</li> <li>• Continue “building the base” via the annual fund for the long-term health of private support</li> </ul>	<ul style="list-style-type: none"> <li>• The economic climate will continue to affect both individual and corporate giving.</li> <li>• Gestation for major gifts can take years, but the Campaign end-date is a useful deadline. (See college/unit plans for more detail.)</li> </ul>
<b>Expansion of Prospect Base</b>	<ul style="list-style-type: none"> <li>• More prospects identified and qualified, especially for priority projects</li> <li>• Solid relationship building in order to engage more prospective supporters in the life of the university</li> </ul>	<ul style="list-style-type: none"> <li>• Continue validating WealthEngine (database screening) information and using web resources to identify prospective donors’ capacity</li> <li>• Continue to seek new prospective donors, recognizing that building relationships precedes garnering gifts</li> <li>• Optimize volunteer involvement in fundraising</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing efforts!</li> <li>• The budget reductions have cut back-office personnel, including Prospect Research and Data/Info Services.</li> </ul> <p style="text-align: right;">(continued)</p>

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

**Department: University Development – Overview**  
**Date: September 2010**

<b>Priority/Product</b>	<b>Criteria for Success</b>	<b>Tactics</b>	<b>Special Considerations</b>
<b>Effective Central Development Fundraising</b>	<ul style="list-style-type: none"> <li>• Active Corporate and Foundation Relations (CFR) efforts</li> <li>• Increased visibility of Planned Giving and awareness of opportunities for donors</li> <li>• Successful President’s Circle appeal</li> </ul>	<ul style="list-style-type: none"> <li>• CFR outreach both nationally and locally</li> <li>• Interaction with allied professionals for Planned Giving</li> <li>• President’s Circle appeal handled by Annual Giving</li> </ul>	<ul style="list-style-type: none"> <li>• Staff will collaborate with campus colleagues.</li> <li>• Annual Giving to work closely with Chair of Development Committee.</li> </ul> <p>(See departmental plans.)</p>
<b>Effective Central Development Support Services</b>	<ul style="list-style-type: none"> <li>• Comprehensive Stewardship, Donor Relations and Volunteer Relations Services</li> <li>• Increasingly accurate, thorough donor/alumni data, used effectively and appropriately by staff</li> <li>• Useful gift/campaign reporting system</li> <li>• Ongoing support of Call Center and Annual Giving program</li> <li>• Prospect tracking &amp; management</li> <li>• Responsive and proactive prospect research</li> <li>• Centralized gift agreement tracking program</li> </ul>	<ul style="list-style-type: none"> <li>• Donor events, donor Honor Roll, effective acknowledgments, tracking of volunteers on Advance, more efficient endowment reporting</li> <li>• Connections with National Board of Visitors</li> <li>• Regular data updates, user-friendly reporting tools, accessible training</li> <li>• Infrastructure upgrades as required</li> <li>• Accurate and timely gift entry and reporting. Create user friendly reports.</li> <li>• Consistent prospect assignment; proposal uploading/tracking; reporting</li> <li>• Vet and upload screening data</li> </ul>	<ul style="list-style-type: none"> <li>• Responsiveness to volunteers continues to be a priority.</li> <li>• A healthy infrastructure is critical but budget shortages have reduced capacity and slowed response time.</li> <li>• Conversion to Oracle remains a necessity.</li> <li>• All operations will collaborate with campus colleagues.</li> </ul> <p>(See departmental plans.)</p>
<b>Campaign Volunteer Involvement</b>	<ul style="list-style-type: none"> <li>• Public phase Co-chairs effectively engaged</li> <li>• Ongoing activism by Campaign Leadership Committee members</li> <li>• Active work by college and campus unit campaign committees</li> <li>• Engagement of Foundation Board members in philanthropic efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly CLC meetings and active individual assignments</li> <li>• Recruitment of new Campaign Leadership Committee (CLC) members as appropriate</li> <li>• All committees activated</li> <li>• Collaborate with Fresno State Alumni Association Board and other volunteers</li> </ul>	<ul style="list-style-type: none"> <li>• Volunteers extend our reach.</li> <li>• Those who are engaged as volunteers are more willing to invest.</li> <li>• We want to involve alumni and friends in the life of the university in every way possible.</li> </ul>