

## University Advancement

Annual Giving

Program Review

Action Update

November 01, 2011

### Action Recommendations (set in 2010)

#### **A. Implement a five-year annual giving strategic plan that includes:**

1. Annual donor and dollar goals (not complete)
2. Operating Plan to reach those goals (not complete)
3. New programs development and implementation plan (not funded)
4. Budgeting and staffing needs including comprehensive job descriptions and performance evaluation (not funded)
5. Developing comprehensive business rules for annual giving operating systems etc. (Viking system being converted to Banner System and reporting systems will not be operational until 2013)
6. Contracting with a telemarketing vendor to conduct and manage a fully operational and comprehensive telemarketing program (Complete)
7. Instituting a university-wide donor recognition and stewardship program this is donor-centric and unifies all annual giving donors to La Verne (Complete)
8. Hiring an annual giving consultant (not funded)
9. Contracting with a website design vendor (complete)

#### **B. Programs to be developed**

- *Leadership Annual Giving Program*
  1. Personal solicitation of \$1,000+ annual giving donors (p.s. at \$2,500+)
  2. Volunteer leadership development (not completed)
  3. Leadership donor honor rolls (complete)
  4. Leadership donor recognition system (partially complete)

5. Prospect screening and cultivation (partially complete)
  6. Gift club management system (not instituted)
- *Parent Annual Giving Program*
    1. Identification, screening and cultivation (partially complete)
    2. Parent data collection (complete for new parents only)
    3. Leadership parent donor personal solicitation (limited)
    4. Hire director of parent annual giving (not funded)
    5. Parent volunteer development (not completed)
    6. Parent leadership donor events, stewardship activities (not completed)
    7. Parent communication, education, direct mail, telemarketing and e'communication (completed)
  - *Undergraduate senior class giving, graduate student, recent graduate and young alumni giving programs*
    1. Leadership donor solicitation (not completed)
    2. Hire director (not funded)
    3. Volunteer leadership development (implemented)
    4. Undergraduate student education initiative (implemented)
    5. Graduating class giving and awareness events and activities (implemented)
    6. Young alumni and recent graduate awareness campaign (not completed)
    7. Direct mail, telemarketing and e'solicitation campaign (implemented)
  - *Reunion class giving program-for future (far into the future)*
  - *Annual giving e'communication and marketing program*
    1. Develop e'newsletters, e'honor rolls, web-videos, facebook, etc. (implemented)
  - *Develop programs that enhance and improve*
    1. The sense of alumni feeling important and part of the community (on-going)
    2. Increased sense of financial responsibility (on-going)