



MIDWESTERN
STATE UNIVERSITY

**ANNUAL FUND STRATEGIC PLANNING
FINAL REPORT**

AUGUST 15, 2003

THE DINI PARTNERS

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OVERVIEW

In May 2003, Midwestern State University engaged The Dini Partners in an Annual Fund Strategic Planning process to strengthen the University's on-going development function through the design and implementation of a comprehensive Annual Fund program. Recommended plans are based on the best practices of highly successful development programs.

To gain insights into the current philanthropic culture at Midwestern State University, twenty-one (21) confidential interviews were conducted with University staff, donors, and alumni.

The initiatives of this plan include:

1. Segmentation and evaluation of potential donor groups;
2. Cultivation and recognition system to guide and track relationships with prospects and donors;
3. Refinement of elements for case materials;
4. Identification of cultivation strategies and techniques for enhancing solicitations;
5. Development of calendar, task, and volunteer and staff job descriptions; and
6. Delineation of the infrastructure to enhance Annual Fund initiatives.

This report provides a recommended plan of action for the Midwestern State University's Annual Fund over the next three years.

HIGH PERFORMING ORGANIZATIONS

In the course of a development program review, numerous judgments concerning the quality of leadership, programming, and practices are made. These judgments are made in light of a specific set of principles exhibited by high-performing model organizations. The following are traditional elements found in high-performing development programs:

Culture of Philanthropy:	A set of behaviors, patterns of speech, and attitudes that express fundraising and development as positive values which are intrinsic to the mission of the organization.
Case:	An articulated fundraising plan and rationale that incorporates strategic plans and is supported by stated goals, budgets, and timetables.
Prospects:	A systematic approach to prospects that includes identification, research, evaluation, assignment, cultivation, solicitation, and stewardship.
Leadership:	Volunteers trained in the techniques of cultivation and solicitation including the ability to articulate the case, present the giving opportunities, and negotiate the funding of commitments.
Staffing:	Trained and experienced professionals and support personnel in adequate numbers to service leadership needs, communicate strategies and results, and manage fundraising information.
Infrastructure:	Appropriate policies, systems, and practices to handle the flow of information related to the asking, receiving, reporting, and recognition processes.

CULTURE OF PHILANTHROPY

One of the most intangible, and yet most visible, characteristics of any nonprofit institution is its culture of philanthropy. Culture is the composite of thought, word and action, which expresses the fundamental values of any human community. Through observation, listening and reflection, donors can identify an organization's attitude toward philanthropy.

In high-performing nonprofit organizations, the culture of philanthropy is expressed in the following manner:

1. Consistent fundraising results;
2. Broad involvement of volunteers and staff in the identification, evaluation, cultivation, solicitation, and stewarding of donors;
3. Language that clearly and unequivocally expresses fundraising as a positive, integral value;
4. Clear understanding that fundraising is one of the most important roles for leaders – both administrative and volunteer;
5. Institutional fundraising goals that are “owned” by both staff and volunteers;
6. A vocabulary which highlights the nobility of giving and the basic human dignity of those solicited; and
7. Expressions of fun, humor, and excitement surrounding the fundraising enterprise.

In fundraising, an organization's culture of philanthropy is expressed in countless ways. Some expressions involve the subtleties of language used on a solicitation call, while others involve the practices of stewardship and donor recognition. The culture of philanthropy is also expressed in fundraising literature, volunteer involvement, the casual conversation of development staff, and the experience of donors.

As Midwestern State University prepares to expand its development efforts, it should continue to work to sustain a positive culture of philanthropy – one that is shared by administration, volunteer leadership, and staff.

People give *to* people. Often, contributions are given because of how one person feels about another. People also give *for* people. Effectively communicating how a financial contribution can change a life or make the world a better, more just, and caring place can often impact to whom, how much, and when contributions are given.

A cardinal rule of fundraising is that those who ask must give first. Each member of the volunteer leadership should make a personal financial commitment **annually** to the University. This not only enhances the leader's position to solicit gifts from others, but it will provide a convincing profile of committed leadership to prospective donors.

THE ANNUAL FUND

The annual fund is the cornerstone in a well-planned development program. Once established, it should never be suspended. If the continuity is broken, it is difficult to rebuild the momentum. The annual fund program not only produces a steady flow of unrestricted and designated support, but also lays the foundation and cultivates donors for major, capital, and endowment gifts in the future. Many major gift donors will come to be involved with Midwestern State University initially through annual giving.

The annual fund, defined, is the process of seeking financial support on an annual basis from the same and broadening constituencies. The annual fund should be used to help foster and establish a culture of philanthropy that is donor and relationship-centered.

The purpose of the annual fund is to:

- ◆ raise funds to support the greatest areas of need;
- ◆ increase awareness of the University within the local and broader communities;
- ◆ identify major gift prospects; and
- ◆ cultivate future leadership for the University.

The principles for success of the annual fund are:

- ◆ a well-defined need and purpose;
- ◆ an efficient and trained organization;
- ◆ realistic benchmarks and goals;
- ◆ well-planned action steps and timetable;
- ◆ a logical order for upgrading donors through planned solicitation techniques;
- ◆ recognition and appreciation appropriate to the level of the gift; and
- ◆ a sequence for the addition of new volunteer committees and new constituencies.

VOLUNTEER AND PROFESSIONAL LEADERSHIP

The fundraising commitment must begin with the senior administration of the University and must be high on the agenda of the volunteer leadership boards. Raising money requires persistence, commitment, year-round cultivation, board support and encouragement, a documented plan, and an attainable goal. Securing Annual Fund support demands not only the involvement of the professional advancement staff, but also a strong cadre of internal and external volunteers who are willing to engage personally in the identification, evaluation, cultivation, solicitation, and stewardship of donors and prospects.

SETTING THE FINANCIAL GOAL

It is important that a specific annual fund goal is established each fiscal year. Goal setting should be based upon:

- ◆ a melding of funding needed and funding potential;
- ◆ the number of viable prospects;
- ◆ selection of the fundraising methods;
- ◆ involvement of volunteer leadership; and
- ◆ level of staff support.

ANNUAL FUND STRATEGIES

Cultivation is the process by which organizations develop new donors and encourage existing donors to strengthen their commitment to the institution. Strategic cultivation requires a plan that involves not just a handful of a few major donors, but also the cultivation of every donor and every prospect who will be asked to give. The level of cultivation depends upon the gift potential of the prospect and donor.

Stewardship is the process by which an organization thanks, recognizes, and informs donors of the proper utilization of their philanthropic support. The process of donor cultivation and stewardship is ongoing and is the key to successful donor relations. Creating giving societies and donor benefits for each level is important in recognizing giving. Incorporating donor lists in newsletters, annual reports, and various institutional communication tools underscore the importance of philanthropic support in achieving institutional priorities. Special donor open house events, personal phone calls, and invitations to specific organizational activities also serve as valuable stewardship tools.

The best prospects for any nonprofit organization are past supporters; therefore, all previous donors should be identified and evaluated for support of the annual fund. The prospects and previous donors should be segmented by giving levels. The higher the giving level, the more personalized the cultivation, solicitation, and stewardship of the prospect or donor should be.

THE MIDWESTERN STATE UNIVERSITY ANNUAL FUND

DEFINITION OF ANNUAL GIVING

Annual giving is an organized effort to secure annual, ongoing philanthropic support for Midwestern State University. Gifts may be unrestricted and restricted in nature. Serving as an arena for volunteer development, annual giving is also used as a cultivation tool for major gifts. All dollars raised are typically allocated to relieving or enhancing MSU's operating budget.

MISSION OF THE ANNUAL FUND

The mission of the Midwestern State University Annual Fund is to find and build a constituency of alumni and friends who are willing to provide consistent financial support to MSU.

PRELIMINARY GOAL

Goals should be set for dollars raised as well as for the number of new donors acquired, percentage of alumni participation, and number of retained and upgraded donors. The specific annual fund goals listed below comprise all solicitation efforts originated and managed by the Director of the Annual Fund, including direct mail, phonathon, and personal solicitation visits.

*Goals each year should be based upon the actual results from the previous fiscal year.

Each year a Scale of Gifts should be developed for the annual fund goal.

LEADERSHIP

STAFF ROLES

Along with the President, the following members of the University Advancement staff play an important role in the success of the MSU Annual Fund:

- ◆ Vice President for University Advancement and Student Affairs;
- ◆ Director of the Annual Fund;
- ◆ Director of Public Relations and Marketing;
- ◆ Director of Donor Services and Special Projects;
- ◆ Director of Alumni Relations;
- ◆ Coordinator of Donor Data and Research;
- ◆ Athletic Director; and
- ◆ Assistant Athletic Director for Marketing and Promotions.

All University Advancement staff members should promote annual support of the University through verbal and written communication. Even though the Director of the Annual Fund will be managing the process, all University Advancement staff may be asked to make personal solicitation visits if they are the “right” person to make the call.

ROLE OF VOLUNTEERS

Volunteer leadership is essential in building credibility and integrity of the case for support. Volunteers may be recruited from current President’s Excellence Club donors or other University supporters. The annual fund should utilize volunteers to promote giving, to rate prospects, and to solicit gifts. Initially a volunteer should be recruited to serve as the University’s Annual Fund Chair.

Specifically, an Annual Fund Chair may be asked to:

- ◆ make a personal gift;
- ◆ identify and evaluate potential annual fund prospects;
- ◆ advocate for the annual fund;
- ◆ sign appeal and stewardship letters; and
- ◆ solicit gifts on behalf of the University.

CASE FOR SUPPORT

The philanthropic appeal for Midwestern State University should emphasize the need to maintain the highest quality educational experience possible for all students. It should underscore the differences that can be achieved with the generous and consistent support of alumni and friends who provide gifts to the annual fund

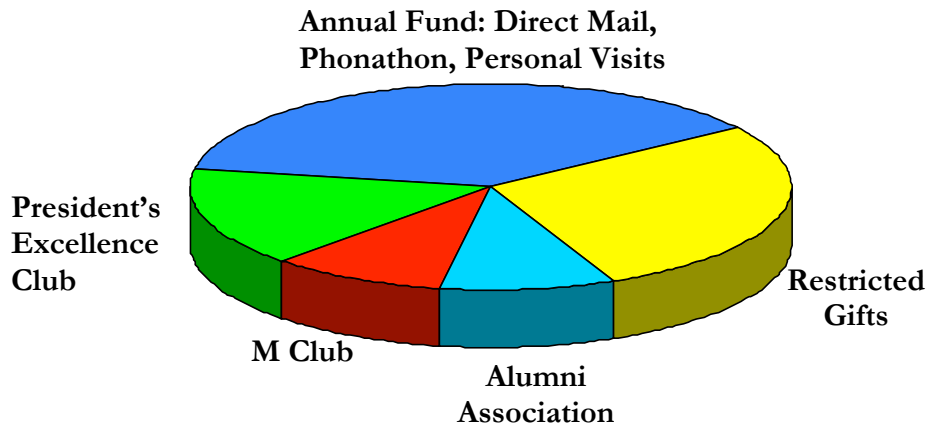
campaign. Also, it should address the University's decision to choose this time in its history to initiate a formal, organized annual fund campaign. Finally, it should focus on the fact that gifts may be designated for support of a variety of areas on campus.

Incorporating personal testimonials of the difference MSU has made in individual lives and why those persons have chosen to support the University is strongly recommended.

OPTIONS

MSU's Annual Fund should allow donors a choice of gift designation. These may be modified each fiscal year to address the University's priorities.

SOURCES OF ANNUAL FUND GIFTS



While the comprehensive annual fund consists of all gifts made each year to support the University's programs and initiatives, this plan specifically addresses those gifts made exclusively as a result of the annual fund office initiatives.

CONSTITUENTS

PROSPECTS

The annual fund should consider solicitation of all potential donor groups, including:

- ◆ Board of Regents
- ◆ Advisory Groups such as:
 - Alumni Association Board
 - M Club Board and Committee
 - Fantasy of Lights Committee
 - President's Excellence Club Advisory Board
- ◆ Alumni
- ◆ Former Students
- ◆ University Administrators
- ◆ Faculty and Staff
- ◆ Volunteer Leadership
- ◆ Parents (Current and Former)
- ◆ Students
- ◆ Friends

- ◆ Corporations and Foundations
- ◆ National Corporations (with facilities in the community)

The Board of Regents, Alumni Board, senior staff and administrators should be asked to assist in the screening and rating of select prospects.

A systematic approach to visit personally with prospects in the Wichita Falls area should be developed for both staff and volunteers. The Director of the Annual Fund should allocate time to visit with five (5) to ten (10) prospects in the Wichita Falls area each month for the purpose of cultivation, solicitation, acknowledgement and stewardship.

SOLICITATION STRATEGIES

SOLICITATION TECHNIQUES

- ◆ Face-to-Face Personal Solicitation Calls
- ◆ Phonathons
- ◆ Direct Mail
- ◆ Special Events

GIVING LEVELS

Within an annual fund, giving societies are frequently used to recognize donors at specific levels. Appropriate recognition at each level is encouraged; however, it is recommended that recognition costs not exceed one percent (1%) of the total gift. Free parking, special access, library privileges, or invitations to select events are some of the generic forms of recognition that many organizations can offer.

The measure of appropriateness might be a proportionate amount of the donor's gift or the extent to which the item will have ancillary promotional benefits, such as a framed certificate or paperweight that visibly promotes the organization and elicits an

inquiry. The primary question should be, is a gift necessary, useful, expected, and a statement about the organization's mission? If not, a better substitute may be a personal phone call, an invitation to tour behind the scenes, meet personally with a scholarship recipient, or a handwritten thank you note from a beneficiary of the philanthropic support.

Recommended MSU giving levels include:

\$1 - \$99	Maroon and Gold Society
\$100-\$249	Sunwatcher Society
\$250-\$499	Midwestern Society
\$500-\$749	Hardin Society
\$750-\$999	Carillon Society
\$1,000-\$2,499	President's Excellence Club
\$2,500-\$5,000	President's Excellence Club - Silver
\$5,000+	President's Excellence Club - Gold
Planned Giving	1922 Society

METHODS OF GIVING

- ◆ Check
- ◆ Credit Card
- ◆ Payroll Deduction
- ◆ Electronic Funds Transfer
- ◆ Secure On-line Giving
- ◆ Stocks
- ◆ Bequests
- ◆ Gift in Kind

SEGMENTS

The annual fund is open to all who support MSU each year. The following prioritizes specific target groups:

YEAR 1 (FISCAL YEAR 2003-2004)

- ◆ MSU current & previous donors, including the *Sunwatcher* projects and Alumni House renovation donors;
- ◆ Distinguished/Outstanding Alumni award recipients;
- ◆ Hardin and Clark Scholars;
- ◆ All Alumni including:
 - Non-donors
 - Faculty and Staff members
 - Members of the Board of Regents;
- ◆ All Faculty and Staff.

YEAR 2 (FISCAL YEAR 2004-2005)

- ◆ All of the above, plus;
- ◆ Remaining alumni scholarship recipients;
- ◆ Parents (current and former).

YEAR 3 (FISCAL YEAR 2005-2006)

- ◆ All of the above, plus;
- ◆ Students; and
- ◆ Corporations and Select Local Foundations.

CHALLENGE GIFT

A Challenge Gift is an excellent way to encourage constituency participation. MSU has secured its first Annual Fund Challenge Gift of \$10,000 per year for three years to encourage first-time alumni gifts. Every opportunity should be used to promote and meet this challenge.

COMMUNICATIONS

The annual fund should utilize existing University communications to incorporate consistent testimonials from donors and to tell the philanthropic story.

Communication vehicles include:

- ◆ *Sunwatcher* magazine;
- ◆ MSU website;
- ◆ Global e-mail communications;
- ◆ President's Excellence Club newsletter;
- ◆ All departmental academic and administrative newsletters and publications;
and
- ◆ Parent publications and communications.

STEWARDSHIP

Donor stewardship extends beyond the acknowledgement and documentation of gifts and pledges. Stewardship is a systematic, coordinated effort that provides documentation to donors as to how specific gifts and commitments are making a difference in the lives of people and for the institution.

Involvement of annual fund volunteer leadership, as well as institutional leadership, is critical to the success of the acknowledgement and stewardship programs. Volunteers may assume important roles such as signing appeal letters, making thank you phone calls or visits, and sending handwritten thank you notes.

Recommended timelines for acknowledgement and thank you letters include:

WEEK 1

Gift received and processed by the Annual Fund Office;

Acknowledgement/receipt mailed by the Annual Fund Office with first-class postage;

Thank you telephone call from the Director of the Annual Fund;

WEEK 2

Thank you letter mailed by the Vice President for University Advancement and Student Affairs Office for gifts of \$100 or more;

Thank you letter mailed by the President's Office for gifts of \$1,000 or more;

WEEK 3

Thank you letter mailed by the volunteer who personally visited and/or solicited the donor;

Thank you letter mailed by the Board of Regents Chair for gifts of \$25,000 or more;

SIX MONTHS

Personalized stewardship report focusing on how gift(s) assisted in meeting the University's priorities;

FISCAL YEAR END

Personalized stewardship report focusing on the specific way in which the donor's gift(s) assisted in making a difference in meeting the University's priorities.

BUDGET

The annual fund program budget will increase exponentially as the number of donors, prospects, and methods of solicitation are incorporated into the program.

DATABASE MANAGEMENT

DATABASE

The foundation of any successful development program is a database with accurate, comprehensive information.

The following data should be captured and maintained with the assistance of all University Advancement staff:

- ◆ Personal Contact Information, including nicknames, and physical, mailing, and e-mail addresses;
- ◆ Business Contact Information, including specific business title, assistant's name and phone number, and physical, mailing, and e-mail addresses;
- ◆ Education: college, graduation year, and degree;
- ◆ Contact Action Reports--capturing specifics of personal visits, telephone calls, meetings, mailings, such as date, purpose, individuals involved; and next steps—[See Appendix G for sample Contact Action Report Form];
- ◆ Spouse information, including maiden and nicknames;
- ◆ Spouse's educational information and affiliations;
- ◆ Names of children and birthdates;
- ◆ Relationships with other constituents;
- ◆ Scholarship recipient;
- ◆ Major student organizations--student government leadership role(s), Greek affiliation, yearbook staff, student ambassadors, campus newspaper staff;
- ◆ Gifts and pledges to MSU; and
- ◆ Giving to other organizations.

Information will be supervised by the Coordinator of Donor Data and Research, however, all University Advancement staff will need to assist in the records management and contact report input, excluding gift records and address correction updates. All University Advancement staff should have at least “view only” access to this information and should be trained on the Raiser’s Edge system for maximum effectiveness in using the database software.

It is recommended that the title of the Coordinator of Donor Data and Research be revised to Database Administrator—a title that more accurately portrays the responsibility of the position. Also, it is recommended that the position report directly to the Director of Annual Fund in order to more efficiently manage the process of prospect identification and management.

Select data may be gathered from campus-wide departments or captured from participants at special events such as Spirit Day, Family Day, Homecoming, athletic gatherings, and graduation. A consistent biographical update mail program should be implemented to make certain that the quality of the data is optimized.

A hierarchy of constituent codes should be applied to the University database delineating which constituent should be selected and categorized for each appeal.

The hierarchy of constituency codes should be based on priority and should include:

1. Board of Regents
2. Alumni
3. Parents
4. Friends
5. Faculty and Staff
6. Former Students

GIFT ACCEPTANCE POLICIES

A comprehensive gift acceptance policy should be proposed by the Director of the Annual Fund and adopted by the University Administration and approved by the Board of Regents.

ANNUAL FUND THREE-YEAR TIMELINE

FISCAL YEAR 2003-2004

OBJECTIVES:

1. Launch Midwestern State University Annual Fund Campaign;
2. Implement Alumni Challenge Gift for all new alumni donors;
3. Commence Faculty and Staff Annual Fund Solicitations;
4. Incorporate a minimum of five (5) personal, face-to-face visits per month with volunteers, donors, and prospects;
5. Provide database management strategies to compliment annual fund goals and objectives;
6. Conduct Raiser's Edge training for advancement staff;
7. Develop prospect management system.

May 2003

1. Retain counsel;
2. Host first University Advancement Graduation tent.

June 2003

1. Initiate President's Luncheon with select alumni participants;
2. Develop segmented lists for annual fund appeal;
3. Confirm gift receipting process via payroll deduction, automatic bank draft, and credit cards.

July 2003

1. Mail stewardship letter to select alumni;
2. Commence preliminary evaluation of alumni database as well as current and previous alumni donors for personalized solicitations;
3. Conduct lost alumni search with Alumni Finder;
4. Secure Alumni Challenge Gift donor;

5. Identify Annual Fund Chair and other potential annual fund volunteer leaders.

August 2003

1. Determine preliminary 2003-2004 Annual Fund Goal;
2. Commence Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff, such as photo with cut line of volunteer leadership or president's luncheon attendees to raise visibility;
3. Recruit Annual Fund Campaign Chairs, including overall Annual Fund Chair as well as the Faculty and Staff Co-Chairs;
4. Present The Dini Partners' Annual Fund Strategic Planning Preliminary Report to the Board of Regents;
5. Prepare orientation materials for campaign volunteers;
6. Solicit gifts from the Annual Fund Chair and volunteers;
7. Prepare materials for first direct mail solicitations and select direct mail vendor;
8. Ascertain the type of weekly, monthly, quarterly, and year-end reports needed to evaluate annual fund progress and success.

September 2003

1. Host an Annual Fund Open House with Deans and select senior administrators;
2. Send Annual Fund appeal to faculty and staff signed by the President and the Faculty and Staff Co-Chairs;
3. Conduct personal, face-to-face solicitation visits with all University Advancement staff;

4. Identify President's Excellence Club members who are alumni annual fund prospects and determine solicitation strategy including:
 - ◆ Who will make the ask;
 - ◆ When the ask is to be made;
 - ◆ How much for which to make the ask; and
 - ◆ If there will be a designation for the gift.
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Incorporate annual fund launch article in fall *Sunwatcher*;
7. Conduct volunteer orientation session;
8. Attend Family Day and begin cultivation of parents;
9. Request monthly annual fund update and reports for monthly evaluation.

October 2003

1. Mail appeal signed by MSU President and Annual Fund Chair to the following prospect segments: *

Outsource: 1. Alumni donors

- First-class postage, live signatures, and personal salutations;
- Specific gift request incorporated into letter.

2. Non-donor alumni (Challenge Gift letter)

- Bulk-rate postage sent from the mail house, live stamp, non-profit rate.

In-House: 1. President's Excellence Club (alumni constituents)

- Donors
- Non-Donors (Challenge Gift letter)
- First-class postage, live signatures, and personal salutations.

* [Note: exclude Alumni Association members in this mailing.]

2. Incorporate Challenge Gift Awareness event at Homecoming;
 - ◆ Announce Annual Fund Goal and Challenge Gift, and provide pledge cards at Homecoming registration.
3. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
4. Capture alumni contact information at tailgate parties as well as other Homecoming and alumni activities;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress;
6. Participate in Graduation Fair.

November 2003

1. Send follow-up appeal to faculty and staff;
2. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
3. Mail Challenge Gift appeal to Alumni Association members;
4. Host President's Luncheon with select alumni participants;
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Attend President's Excellence Club dinner;
7. Request monthly annual fund update reports from Database Administrator and evaluate progress.

December 2003

1. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
2. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
3. Request monthly reports from Database Administrator and evaluate progress;

4. Develop annual fund article for *Sunwatcher*.

January 2004

1. Conclude Faculty and Staff Campaign and announce results;
2. Request monthly and calendar year-end annual fund reports from Database Administrator and evaluate progress against previous fiscal year's results;
3. Mail personalized calendar year-end update report to donors and campaign volunteers;
4. Track statistics of donors and source of response method: direct mail, website, personal visit, etc. and prepare preliminary reports;
5. Begin thank you visits to annual fund donors including faculty and staff;
6. Report calendar year-end annual fund results to University Advancement team;
7. Conduct prospect evaluation screening and rating meeting with Deans and senior faculty to strategize cultivation and solicitation plans for select alumni prospects;
8. Calculate all costs per dollar raised;
9. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
10. Hold Victory Celebration event or recognition event for faculty and staff donors;
11. Prepare for spring phone Thank-a-thon.

February 2004

1. Send segmented, targeted annual fund mail appeal to those alumni who have not yet responded;
2. Host President's Luncheon with select alumni participants;
3. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;

4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress.

March 2004

1. Incorporate a Challenge Gift/Annual Fund update article highlighting volunteer leadership and how gift support is making a difference at the University in *Sunwatcher*;
2. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
3. Continue updating the database and providing Raiser's Edge assistance;
4. Request monthly annual fund update reports from Database Administrator and evaluate progress;
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Participate in Graduation Fair.

April 2004

1. Conduct thank you dinner for annual fund volunteers at President's home;
2. Attend Honors Banquet for cultivation opportunities;
3. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Host Thank-a-thon consisting of student volunteers calling all annual fund donors;
6. Request monthly annual fund update reports from Database Administrator and evaluate progress.

May 2004

1. Send Annual Fund End-of-Fiscal Year appeal to those who have not responded from previous mailings;
2. Recruit Fiscal 2004-2005 Annual Fund Chair and volunteers;
3. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress;
6. Determine fall Phonathon segmentation and request lists.

June 2004

1. Prepare orientation materials for campaign volunteers;
2. Identify major annual fund prospects for personal visits and omit from direct mail and phonathon list for the fall's annual fund launch;
3. Utilize volunteers to help develop strategies for each prospect;
4. Host President's luncheon with select alumni participants;
5. Conduct five (5) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
6. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
7. Set Annual Fund Goal for Fiscal 2004-2005;
8. Develop segmented lists for fall annual fund appeal;
9. Recruit Parent Fund Chair and volunteers
10. Recruit Faculty and Staff Co-Chairs and volunteers;
11. Prepare materials for direct mail solicitation and select direct mail vendor;

12. Request monthly annual fund update reports from Database Administrator and evaluate progress;
13. Attend Spirit Days and cultivate first-year parents;
14. Develop annual fund article for fall 2004 *Sunwatcher*.

July 2004

1. Send annual fund appeal to M Club alumni donors;
2. Rate and assign major gift prospects;
3. Incorporate the Raiser's Edge prospect management system in the annual fund program;
4. Mail stewardship letter requesting biographical information to select alumni;
5. Confirm Challenge Gift and progress toward reaching the goal;
6. Conduct volunteer orientation session;
7. Request monthly annual fund update reports from Database Administrator and evaluate progress.

August 2004

1. Host an Annual Fund Open House with Deans and select senior administrators;
2. Target personal solicitations for President's Excellence Club members who are alumni;
3. Conduct five (5) personal, face-to-face cultivation and solicitation visits with alumni in Wichita Falls (monthly);
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Present Annual Fund Report to Board of Regents;
6. Solicit gifts from the annual fund volunteers;
7. Begin soliciting major gift prospects;

8. Request monthly annual fund update reports from Database Administrator and evaluate progress.

FISCAL YEAR 2004-2005

OBJECTIVES

1. Segment alumni by the Colleges of _____
2. Introduce the Phonathon
3. Implement Parent Giving
4. Retain and Upgrade Donors
5. Make Seven (7) Personal Visits per Month
6. Offer Monthly Reminders for Pledge Payments
7. Produce Donor Report
8. Revise Organizational Chart to include Coordinator of Donor Data and Research reporting to Director of Annual Fund

September 2004

1. Recognize annual fund donors of \$1 or more by giving society levels and mail to entire database: Donor Report;
2. Send annual fund appeal to faculty and staff signed by the President and the Faculty and Staff volunteers;
3. Conduct personal face-to-face solicitation visits to all University Advancement staff and ask them to increase their gift;
4. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;

5. Identify President's Excellence Club members who are alumni annual fund prospects and determine solicitation strategy including:
 - ◆ Who will make the ask;
 - ◆ When the ask is to be made;
 - ◆ How much for which to make the ask; and
 - ◆ If there will be a designation for the gift.
6. Send Parent Fund appeal to all parents (direct mail, bulk rate, signed by President and Parent Fund Chairs);
7. Launch Phonathon with calls to alumni donors and non-donors (five weeks in duration);
8. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
9. Attend Family Day and continue cultivation of parents;
10. Request monthly annual fund update reports from Database Administrator and evaluate progress.

October 2004

1. Mail appeal signed by Annual Fund Chair (MSU alum) to the following prospect segments:*

Outsource: 1. Alumni donors

- First-class postage, live signatures, and personal salutations;
- Specific gift request incorporated into letter.

2. Non-donor alumni (Challenge Gift letter)

- Bulk-rate postage sent from the mail house, live stamp, non-profit rate.

In-House: 1. President's Excellence Club (alumni constituents)

- Donors
- Non-Donors (Challenge Gift letter)
- First-class postage, live signatures, and personal salutations.

* *[Note: exclude Alumni Association members in this mailing.]*

2. Incorporate Challenge Gift awareness event at Homecoming;
 - ◆ Announce Annual Fund Goal and Challenge Gift and provide pledge cards at Homecoming registration.
3. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress;
6. Capture alumni contact information at tailgate parties as well as other Homecoming and alumni activities;
7. Participate in Graduation Fair.

November 2004

1. Send follow-up appeal to faculty and staff;
2. Mail annual fund appeal to Alumni Association members and segment by donors and non-donors;
3. Host President's Luncheon with select alumni participants;
4. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Attend President's Excellence Club dinner;
7. Request monthly annual fund update reports from Database Administrator and evaluate progress;
8. Develop annual fund article for *Sunwatcher*.

December 2004

1. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
2. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
3. Request monthly annual fund update reports from Database Administrator and evaluate progress.

January 2005

1. Request monthly and calendar year-end annual fund reports from Database Administrator and evaluate progress against previous fiscal year's results;
2. Conclude Faculty and Staff Campaign and announce results;
3. Begin thank you visits to annual fund donors including faculty, staff and parents;
4. Track statistics of donors and source of response method: direct mail, website, personal visit, etc.;
5. Calculate all costs per dollar raised;
6. Report calendar year-end annual fund results to University Advancement team;
7. Hold Victory Celebration event or recognition event for faculty and staff donors;
8. Mail personalized calendar year-end update report to donors and campaign volunteers;
9. Conduct prospect evaluation screening and rating meeting with Deans and senior faculty to strategize cultivation and solicitation plans for select alumni prospects;
10. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
11. Prepare for spring Thank-a-thon.

February 2005

1. Send segmented, targeted annual fund mail appeal to those alumni and parents who have responded;
2. Host President's Luncheon with select alumni participants;
3. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress.

March 2005

1. Incorporate a Challenge Gift/Annual Fund update in *Sunwatcher*;
2. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
3. Continue updating the database and providing Raiser's Edge assistance;
4. Conduct Phonathon with calls to alumni donors and non-donors;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress;
6. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
7. Participate in Graduation Fair.

April 2005

1. Conduct thank you event for annual fund volunteers at President's Home;
2. Attend Honors Banquet for cultivation opportunities;
3. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;

4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress;
6. Host Thank-a-thon consisting of student volunteers calling all annual fund donors.

May 2005

1. Send Annual Fund End-of-Fiscal Year Appeal to those who have not responded from previous mailings;
2. Recruit Fiscal 2005 - 2006 Annual Fund Chair and volunteers;
3. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Request monthly annual fund update reports from Database Administrator and evaluate progress;
6. Determine fall Phonathon segmentation and request lists.

June 2005

1. Prepare orientation materials for campaign volunteers;
2. Identify major annual fund prospects for personal visits and omit from direct mail and phonathon lists for the fall's annual fund launch;
3. Host President's luncheon with select alumni participants;
4. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Set Annual Fund Goal for Fiscal Year 2005-2006;

7. Develop segmented lists for fall annual fund appeal;
8. Recruit Parent Fund Chair and volunteers;
9. Recruit Faculty and Staff Co-Chairs and volunteers;
10. Attend Spirit Days and cultivate first-year parents;
11. Request monthly annual fund update reports from Database Administrator and evaluate progress;
12. Utilize volunteers to help develop strategies for each prospect;
13. Prepare materials for direct mail solicitation and select direct mail vendor;
14. Develop annual fund article for fall 2005 *Sunwatcher*.

July 2005

1. Send annual fund appeal to M Club alumni donors;
2. Rate and assign major gift prospects;
3. Mail stewardship letter requesting biographical information to select alumni;
4. Confirm Challenge Gift and progress toward reaching the goal;
5. Conduct volunteer orientation session;
6. Request monthly annual fund update reports from Database Administrator and evaluate progress.

August 2005

1. Host an Annual Fund Open House with Deans and select faculty and administrators;
2. Target personal solicitations for President's Excellence Club members who are alumni;
3. Conduct seven (7) personal, face-to-face cultivation and solicitation visits with annual fund prospects;

4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Present Annual Fund Report to Board of Regents;
6. Solicit gifts from the annual fund volunteers;
7. Begin soliciting major gift prospects;
8. Request monthly annual fund update reports from Database Administrator and evaluate progress.

FISCAL YEAR 2005-2006

OBJECTIVES

1. Implement Student Giving Program to Benefit Campus Improvements
2. Implement Corporate Giving Society at \$1,000
3. Conduct Ten (10) Personal, Face-To-Face Cultivation and Solicitation Visits per Month
4. Add Assistant Director of Annual Fund Position
5. Announce Challenge Gift Success

September 2005

1. Recognize annual fund donors of \$1 or more by giving society levels and mail to entire database: Donor Report;
2. Send annual fund appeal to faculty and staff signed by Faculty and Staff Chair;
3. Conduct personal face-to-face solicitation visits to all University Advancement staff and ask them to increase their gift;
4. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
5. Send Parent Fund appeal to all parents, ask donors to increase their gift;
6. Conduct Phonathon with calls to alumni donors and non-donors;

7. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
8. Recruit Corporate Giving committee;
9. Incorporate annual fund article in *Sunwatcher* highlighting leadership;
10. Request monthly annual fund update reports from Database Administrator and evaluate progress;
11. Attend Family Day and begin cultivation of parents;
12. Identify President's Excellence Club members who are alumni annual fund prospects and determine solicitation strategy including:
 - ◆ Who will make the ask;
 - ◆ When the ask is to be made;
 - ◆ How much for which to make the ask; and
 - ◆ If there will be a designation for the gift.

October 2005

1. Mail appeal signed by MSU President and Annual Fund Chair (MSU alum) to the following segments:*

Outsource: 1. Alumni donors

- First-class postage, live signatures, and personal salutations;
- Specific gift request incorporated into letter.

2. Non-donor alumni (Final Challenge Gift letter)

- Bulk-rate postage sent from the mail house, live stamp, non-profit rate.

In-House: 1. President's Excellence Club (alumni constituents)

- Donors
- Non-Donors (Challenge Gift letter)
- First-class postage, live signatures, and personal salutations.

* [Note: exclude Alumni Association members in this mailing.]

2. Incorporate Challenge Gift awareness event at Homecoming:

- ◆ Announce current year Annual Fund Goal and Challenge Gift progress, and provide pledge cards at Homecoming registration.
- 3. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
- 4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
- 5. Identify Corporate Giving prospects;
- 6. Conduct Parent Phonathon;
- 7. Capture alumni contact information at tailgate parties, as well as other Homecoming and alumni activities.
- 8. Hold prospect management reporting meeting;
- 9. Request monthly annual fund update reports from Database Administrator and evaluate progress.
- 10. Participate in Graduation Fair.

November 2005

- 1. Send follow-up appeal to faculty and staff;
- 2. Mail final Challenge Gift appeal to alumni association members who are non-donors;
- 3. Mail annual fund appeal to alumni association members who are donors.
- 4. Host President's Luncheon with select alumni participants;
- 5. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
- 6. Include Annual Fund spotlight piece in weekly campus e-mail bulletins to faculty and staff;
- 7. Attend President's Excellence Club dinner;
- 8. Request monthly annual fund update reports from Database Administrator and evaluate progress;

9. Develop annual fund article for *Sunwatcher*.

December 2005

1. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
2. Include Annual Fund spotlight piece in weekly campus e-mail bulletins to faculty and staff;
3. Request monthly annual fund update reports from Database Administrator and evaluate progress.

January 2006

1. Conclude Faculty and Staff Campaign and announce results;
2. Begin thank you visits to annual fund donors including faculty, staff and parents;
3. Track statistics of donors and source of response method: direct mail, website, personal visit, etc.;
4. Calculate all costs per dollar raised;
5. Report calendar year-end annual fund results to University Advancement team;
6. Mail personalized calendar year-end update report to donors and campaign volunteers;
7. Launch Corporate Giving program with kick-off/reception at President's house;
8. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
9. Conduct prospect evaluation screening and rating meeting with Deans and senior faculty to strategize cultivation and solicitation plans for select alumni prospects;
10. Hold Victory Celebration event or recognition event for faculty and staff donors;
11. Recruit Student Giving committee;

12. Request monthly and calendar year-end annual fund reports from Database Administrator and evaluate progress against previous fiscal year's results.

February 2006

1. Send segmented, targeted annual fund mail appeal to those alumni and parents who have not responded;
2. Host President's Luncheon with select alumni participants;
3. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Send appeal for Student Giving;
6. Request monthly annual fund update reports from Database Administrator and evaluate progress.

March 2006

1. Incorporate a Challenge Gift/Annual Fund update in *Sunwatcher*;
2. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
3. Continue updating the database and providing Raiser's Edge assistance;
4. Conduct Phonathon for donors and non-donors;
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Request monthly annual fund update reports from Database Administrator and evaluate progress;
7. Participate in Graduation Fair.

April 2006

1. Conduct thank you event for annual fund volunteers at President's Home;
2. Attend Honors Banquet for cultivation opportunities;
3. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Host Thank-a-thon consisting of student volunteers calling all annual fund donors;
6. Recognize student donors on campus;
7. Request monthly annual fund update reports from Database Administrator and evaluate progress.

May 2006

1. Send Annual Fund End of Year Appeal to those who have not responded from previous mailings, excluding M Club;
2. Recruit Fiscal 2006 – 2007 Annual Fund Chair and committee;
3. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Determine Phonathon segmentation and request lists;
6. Request monthly annual fund update reports from Database Administrator and evaluate progress.

June 2006

1. Prepare orientation materials for campaign volunteers;
2. Identify major annual fund prospects for personal visits and omit from direct mail and phonathon lists for the fall's annual fund launch;

3. Host President's luncheon with select alumni participants;
4. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
5. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
6. Set Annual Fund Goal for Fiscal Year 2006-2007;
7. Utilize volunteers to help develop strategies for each prospect;
8. Attend Spirit Days and cultivate first year parents;
9. Prepare materials for direct mail solicitation and select direct mail vendor;
10. Develop segmented lists for annual fund appeal;
11. Recruit Parent Fund Chair and volunteers;
12. Recruit Faculty and Staff Co-Chairs and volunteers;
13. Request monthly annual fund update reports from Database Administrator and evaluate progress.

July 2006

1. Send annual fund appeal to M Club alumni donors;
2. Rate and assign major gift prospects;
3. Mail stewardship letter requesting biographical information to select alumni;
4. Confirm Challenge Gift and progress toward reaching the goal;
5. Conduct volunteer orientation session;
6. Request monthly annual fund update reports from Database Administrator and evaluate progress.

August 2006

1. Host an Annual Fund Open House with Deans and select faculty and senior administrators;
2. Target personal solicitations for President's Excellence Club members who are alumni;
3. Conduct ten (10) personal, face-to-face cultivation and solicitation visits with annual fund prospects;
4. Include Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff;
5. Present Annual Fund Report to Board of Regents;
6. Solicit gifts from the annual fund volunteers;
7. Begin soliciting major gift prospects;
8. Announce Challenge Gift goal reached and set date for Victory Celebration for donors and volunteer leadership;
9. Request monthly annual fund update reports from Database Administrator and evaluate progress.

SCALE OF GIFTS

\$200,000 GOAL

GIFT LEVEL	# OF GIFTS	LEVEL TOTAL	CUMULATIVE TOTAL
\$40,000	1	\$40,000	\$40,000
\$20,000	1	\$20,000	\$60,000
\$15,000	2	\$30,000	\$90,000
\$10,000	4	\$40,000	\$130,000
\$5,000	8	\$40,000	\$170,000
Less than \$5,000	Many	\$30,000	\$200,000

SCALE OF GIFTS

\$50,000 GOAL

GIFT LEVEL	# OF GIFTS	LEVEL TOTAL	CUMULATIVE TOTAL
\$10,000	1	\$10,000	\$10,000
\$2,500	2	\$5,000	\$12,500
\$1,000	7	\$7,000	\$19,500
\$500	20	\$10,000	\$29,500
\$250	30	\$7,500	\$37,000
\$100	50	\$5,000	\$42,000
\$50	100	\$5,000	\$47,000
Less than \$50	Many	\$3,000	\$50,000

DIRECTOR OF THE ANNUAL FUND

JOB DESCRIPTION

Purpose:

To direct the Annual Fund by soliciting gifts from the University's constituents.

Primary Duties:

- ♦ Develop the annual giving program and goals, implement strategies to meet goals, and track and report all donations.
- ♦ Manage annual fund volunteers: alumni, faculty and staff, parents, students, businesses.
- ♦ Solicit gifts of \$100- \$5,000+ through personal visits.
- ♦ Develop forms of recognition for annual fund donors.
- ♦ Direct prospect management activities.
- ♦ Work closely with University Advancement staff to coordinate fundraising activities and to create complete and accurate donor records in a unified database (Raiser's Edge).
- ♦ Work closely with the Public Relations and Marketing Director to develop promotional materials to promote the annual fund.
- ♦ Maintain absolute confidentiality and a friendly, cooperative relationship with the Board of Regents, staff, volunteers, alumni, and donors.
- ♦ Supervise the Coordinator for Donor Data and Research who tracks and maintains constituent records on the university database.
- ♦ Write fundraising appeals.
- ♦ Act as liaison with internal and external audiences.
- ♦ Work with printers, designers, and mail houses.
- ♦ Organize telephone solicitations and special events.
- ♦ Analyze gift records to set goals.
- ♦ Manage the annual fund budget.
- ♦ Work closely with the Alumni Relations Director to coordinate fundraising initiatives with alumni programs and events.

Qualifications:

Bachelor's degree is required. CFRE preferred. At least three years experience in fundraising, university relations, or related field are key. Strong written, verbal, and organizational skills are required.

ANNUAL FUND CHAIR

POSITION DESCRIPTION

The Annual Fund Chair shall be an alumnus of Northwestern State University who advocates for annual gifts on its behalf from alumni, parents, friends, and faculty and staff. Specific job description includes the following:

- ◆ Make a personal meaningful gift to the annual fund;
- ◆ Recruit additional volunteers to assist in annual fund solicitations;
- ◆ Motivate others to make annual gifts to Northwestern State University by signing appeal letters;
- ◆ Advocate for the needs and financial support of Northwestern State University;
- ◆ Lend your name to a roster of annual fund volunteers;
- ◆ Work closely with the Director of Annual Fund;
- ◆ Report annual giving progress to the Board of Regents;
- ◆ Identify and evaluate potential annual fund prospects;
- ◆ Solicit financial support from select individual prospects; and
- ◆ Thank donors and volunteers for their support by signing stewardship letters.

CONTACT ACTION REPORT FORM

Prospect _____
Name/Title

Address/Phone:

Call Made By: _____ **Date of Call:** _____

Call Objective: _____

Result: _____

Next Step & _____
Timing:

Report Prepared By: _____

Date:

Be sure to document the results of your calls and forward to the Annual Fund Office. Thank you.

APPENDIX H

DATABASE ADMINISTRATOR

JOB DESCRIPTION

General Description

Responsibilities include planning and implementing data management procedures and policies. This position is responsible for maintaining accurate records in the Raiser's Edge database, developing and preparing timely and accurate reports, and researching donors and prospects.

Duties

- ◆ Maintain and manage gift records, receipts, and acknowledgements, and constituent information for entire Midwestern State University database.
- ◆ Produce standard and financial reports including donor and prospect lists.
- ◆ Provide constituent lists for university departments for various mailings.
- ◆ Set and monitor database standards.
- ◆ Provide training on Raiser's Edge to select University staff in records management and contact report data input.
- ◆ Efficiently manage the process of prospect identification and management.
- ◆ Coordinate data gathering from campus-wide departments or individuals to help update and maintain the database.
- ◆ Establish and implement a hierarchy of constituent codes for each record.

Supervision

Reports to the Director of the Annual Fund.

Qualifications

Bachelor's degree preferred, plus three years database management experience necessary. Knowledge of the Raiser's Edge program and development experience an

asset. Competency in Microsoft Word, Excel, and Outlook as well as accurate data entry and proofreading skills preferred.

FACULTY/STAFF CAMPAIGN CO-CHAIRS

POSITION DESCRIPTION

The Faculty and Staff Campaign Co-Chairs shall be members of the faculty and staff of Midwestern State University who are campus leaders and are recognized as such. Specific job description includes the following:

- ◆ Motivate others to make annual gifts to Midwestern State University by signing appeal letters;
- ◆ Advocate for the needs and financial support of Midwestern State University;
- ◆ Support the MSU Annual Fund with a personal financial gift;
- ◆ Lend your name to a roster of annual fund volunteers;
- ◆ Work closely with the Director of the Annual Fund;
- ◆ Recruit additional volunteers to assist in the campaign (if needed);
- ◆ Solicit financial support from select individual prospects; and
- ◆ Thank donors for their support by signing letters.

SUGGESTED VOLUNTEER ORIENTATION MATERIALS

SOLICITATION CALL OBJECTIVES

Objectives:

- ◆ To ascertain the philanthropic objectives of the potential donor.
- ◆ To uncover and suggest the appropriate match with MSU's initiatives.
- ◆ To determine the extent and level of potential financial support for MSU.
- ◆ To establish a strategy to further cultivate and solicit gifts.

Desired Results:

- ◆ Understand potential donor's perspective on MSU and donor's funding objectives.
- ◆ Discover complimentary objectives upon which to base a funding request.
- ◆ Raise potential donor's awareness, interest and commitment to MSU.

Some General Guidelines:

- ◆ Be purposeful about reasons for the visit.
- ◆ Express appreciation for support and the opportunity for the conversation.
- ◆ Direct the conversation to learn how the university's mission and vision may compliment potential donor's philanthropic objectives.
- ◆ Seek donor's reaction and guidance on the university's long-term plan.
- ◆ Keep responses brief and on-message.
- ◆ Use real-life examples to illustrate points.
- ◆ Underscore the urgency.
- ◆ Leave with a clear statement of next steps.

SUGGESTED VOLUNTEER ORIENTATION MATERIALS

VOLUNTEER SOLICITOR'S CHECKLIST

- 1) Make your own commitment. \$\$\$
- 2) Begin with your best prospect.
- 3) A personal visit is a must.
 - ◆ Be direct about your purpose.
 - ◆ Set the date.
- 4) Prepare for the visit.
 - ◆ Recall the importance of each gift.
 - ◆ Mentally visualize the visit and the “ask.”
 - ◆ Confirm the asking level.
 - ◆ Review the case.
 - ◆ Take a partner.
 - ◆ Practice the call.
- 5) The visit.
 - ◆ Open with conversation.
 - ◆ Establish rapport.
 - ◆ Listen for clues.
 - ◆ Present the case.
 - ◆ Discuss the Challenge Gift. (for new alumni donors)
 - ◆ Take the high road – goals, dreams, and benefits.
 - ◆ Beware of the low road – needs, wants.
- 6) Ask for the gift.
 - ◆ Face to face. ☞
 - ◆ From a position of strength, know your story.
 - ◆ Specific amount.
 - ◆ Ask the prospect to:
 - “Join me in a pledge/gift of \$_____.”
 - “Consider a pledge/gift of \$_____.”
 - ◆ Never say “we’ve got you down for \$xx.”

- ◆ Use your gift as an example.
 - ◆ Wait...listen... turn around objections.
- 7) The Answer:
- ◆ Yes.
 - ◆ Need to think it over.
 - ◆ No, or we cannot give.
- 8) Responding to the answer:
- ◆ If “yes,” complete gift form and return to the Annual Fund Office.
 - ◆ If they need to think it over, schedule a second meeting.
 - ◆ If “no,” ask if there is a particular reason. Address it.
- 9) Share the good news!
- ◆ Say thank you with a phone call. 📞
 - ◆ Follow up with a letter. ✉️
 - ◆ Report call results to the Annual Fund Office.
- 10) Reward yourself and return to Step 3.

**If the gift you receive seems small, don't be disappointed.
It is impossible to know the full story of an individual's
obligations. Be grateful!
You can be assured that MSU will be.**

SUGGESTED VOLUNTEER ORIENTATION MATERIALS

FREQUENTLY ASKED QUESTIONS

What is the Annual Fund?

As part of the Annual Fund program, we will contact alumni, parents, faculty, staff and friends through direct mail, phonathons or special events to encourage them to make annual donations to MSU. Annual gifts made to the Annual Fund provide MSU with the flexibility to invest in the faculty and staff, enhance academic programs, strengthen student programs and scholarships, continue making campus improvements and provide more resources to improve the quality of life on campus.

Why is the Annual Fund important?

Since 1922, private contributions from alumni, parents and friends of MSU have offered strong support to help MSU achieve its goals. With this new program, we will have another resource to help secure additional funding for our university.

Why are YOU important?

Charitable contributions from our alumni, parents, faculty, staff and friends make it all possible. Whether you choose to give now or later, your gift will benefit Midwestern State University. Each gift, no matter how large or small, is important.

Why give each year?

Your participation and gifts affect the quality of programs and student life. Your annual support will provide exciting new developments on campus and greater opportunities for students at Midwestern State University.

Donate Online *www.mwsu-edu/donations*

Donate by Phone *Please call us at (940)397-4539.*
We accept Visa, Mastercard, and Discover

Donate by Mail *Complete the online gift form, print and mail with your check to:*
MSU Annual Fund
3410 Taft
Wichita Falls, Texas 76308

Other *Employee Payroll Deduction*
Electronic Funds Transfer from bank account

Your gift can make a difference.

Thank you for supporting Midwestern State University. For more information, contact the Annual Fund office at (940) 397-4539.

PARENT FUND CHAIRS

POSITION DESCRIPTION

The Parent Fund Chairs shall be parents of current students of Midwestern State University and donors to the annual fund. Specific job description includes the following:

- ◆ Personally make a meaningful gift to the Parent Fund;
- ◆ Recruit volunteers to serve in various roles;
- ◆ Solicit select major gifts from Parent Fund prospects;
- ◆ Make presentations to parents regarding the status of the campaign and the importance of parent giving;
- ◆ Motivate others to make annual gifts to Midwestern State University by signing appeal letters;
- ◆ Advocate for the needs and financial support of Midwestern State University;
- ◆ Lend your name to a roster of annual fund volunteers;
- ◆ Work closely with the Director of the Annual Fund; and
- ◆ Thank donors for their support by signing stewardship letters.

CORPORATE GIVING CHAIR

POSITION DESCRIPTION

The Corporate Giving Chair shall be a recognizable member of the corporate community and a donor to the Midwestern State University Annual Fund. Specific job description includes the following:

- ◆ Make a meaningful gift to the Corporate Giving Program;
- ◆ Recruit volunteers to serve in various roles;
- ◆ Solicit select gifts from Corporate Giving prospects;
- ◆ Make presentations to corporations regarding the importance of corporate support;
- ◆ Motivate others to make annual gifts to Midwestern State University by signing appeal letters;
- ◆ Advocate for the needs and financial support of Midwestern State University;
- ◆ Lend your name to a roster of annual fund volunteers;
- ◆ Work closely with the Director of the Annual Fund; and
- ◆ Thank donors for their support by signing stewardship letters.

ASSISTANT DIRECTOR OF THE ANNUAL FUND

JOB DESCRIPTION

Reports to the Director of the Annual Fund

Job Summary:

Assists in development activities for Midwestern State University through annual fundraising activities with the following constituents: alumni, faculty and staff, parents, friends, students, donors, volunteers, and foundations and corporations. Other select projects will be assigned.

Duties

Primary emphasis will be placed on supporting development activities.

- ◆ Supports the creation and organization of all fundraising efforts.
- ◆ Assists with the planning, development and implementation of orientation and training material for volunteers.
- ◆ Coordinates various aspects of fundraising initiatives such as preparing for direct mail and phonathon efforts by working with vendors and volunteers.
- ◆ Maintains general activity and correspondence files on all assigned projects.
- ◆ Submits reports as assigned by Director of the Annual Fund.
- ◆ Prepares and manages budgets as assigned.
- ◆ Submits activity plans, goals, and objectives, and any staff reports as may be required.
- ◆ Maintains information on all appropriate projects to assist in its assessment.

Qualifications and Preferences

Bachelors' Degree, fundraising, sales or marketing experience preferred. Must have demonstrated success in organizing activities and in working with volunteers. Must have strong computer, and written and verbal communication skills.