

## **CAL POLY POMONA LEARNING CENTERED INITIATIVE**

### Institutionalization Plan – Division of University Advancement

The Division of University Advancement's (UAD) primary purpose is to enhance the private support and knowledge of the university. The division develops programs, events and activities that stimulate the involvement and interest of alumni, friends, parents, corporations, and foundations to develop relationships which cultivate and foster relationships and stimulate giving to the university.

#### **Creating a Learning-Centered Organization**

The long-term impact of the Learning-Centered Initiative rests on the application of those principles within campus organizations. The model presented by the Division of University Advancement is in step with the university's prioritization and recovery process, embedding the learning-centered principles at the *program-level*. UAD currently sponsors and manages 36 programs within 18 different units or departments. The division leadership unanimously agreed that the initiative would have a much greater division-impact if it became part of the core operations or programs.

Those programs include:

Alumni and Student Programs	Gift processing and record mgmt.
Alumni Association	Govt. Relations - Policy Influence
Alumni Outreach and Recognition	Govt. Relations - Resource Acq.
Annual Fund	Athletics Development
CLASS Development	Int. Communications and Relations
College of Agriculture Development	IT Maintenance and Support
College of Business Admin. Dev.	Licensing of Facilities/ Events & Filming
College of Engineering Dev.	Media Communications Management
College of Env. Design Dev.	National Development Council (NDC)
College of Science Dev.	Partners in Education (PIE)
Collins School Development	Planned Giving
Corporate and Found. Relations	President's Council
Dev. Data and Programming	Prospect Research
Development Events	Special Events and Projects
Div. of Student Affairs Development	University Educational Trust (UET)
Donor Relations and Stewardship	Visual Identity and Branding
Ext. Communications and Relations	VPUA Administrative Operations

Each member of the division-cabinet was charged with addressing seven of the eight points identified by the *Learning-Centered University Task Force*. The only one omitted at this time addressed classroom related instruction.

## I How does this program establish measurable outcomes?

All development programs are responsible for the development, implementation and evaluation of a comprehensive fund-raising effort from private sources for Cal Poly Pomona. This is established through annually defined goals in the administrative work plan, based on previously attained results, defined project priorities and established expectations for program outcomes. These work plan goals include set funding outcomes for college/unit/university projects and priorities with a set measure of prospects and activity required to meet this outcome.

The Vice President's Administrative Operations submits an annual report to the Chancellors Office with plans for the coming year which outlines projected fund-raising totals, new programs, initiatives and campaigns based on the prior year's successes and the future needs of the university.

Alumni and student programs (Student Alumni Association, Bronco Stampede and Bronco Mentoring Programs) are designed to recognize our student leaders, introduce students to life after graduation, create an opportunity for students to connect with alumni and encourage networking. The goals are established and measured by the SAA executive committee (with support by the Office of Alumni Affairs), the leadership of the Visitor's Center and the university Alumni Association.

The Alumni Association is an independent 501 (c) 3 focusing on outreach, programs, events and benefits for alumni and students. Programs include, membership, alumni scholars program, regional and special interest chapters. Events such as the annual evening at the ballpark, golf tournament, annual meeting and various chapter events, are designed to connect alumni to the campus and create an opportunity for networking and communication. Benefits include discounts, insurance, publications and invitations to events. Measurable outcomes are established by the strategic plan committee and a consultant. Each spring a facilitator is hired to administer a survey. Several open ended questions pertaining to goals for the year are included. With the exception of the Alumni Board's Executive Committee, all committees and chapters must provide expectations of specific programs and/or events prior to receiving funding for events, program, etc. Goals for the Alumni Association and chapter program are also included the Director of Alumni Affairs administrative work plan.

The Alumni Outreach and Recognition consist of the *Professor for a Day* and *Distinguished Alumni Awards*, which recognize and honor our alumni for their professional success, accomplishments, service to the university and community. Alumni outreach and recognition is crucial to development, cultivation and stewardship. Both programs bring alumni onto campus and connect them with students, faculty and other alumni. The Professor for a Day committee is made up of a liaison from each college/school comes together 1-2 times prior to each event. Goal setting, outcomes, and planning are part of these meetings. In the Distinguished Alumni Awards event, Alumni Association Board of Director's awards committee is charged with establishing criteria or the honorees, evaluating the process and event on an annual basis.

Within Special Events and Special Projects, strategies for presenting events are specific to each area's development needs. Goals are set such as attendance, income and the establishment of relationships. There are specific benchmarks for each event, which are documented to ensure long-term success. For the Licensing of Facilities/ Events & Filming program, systems are in place to track statistics including; costs for services, usage requirement, marketing dollars spent to income earned, and tracking of necessary resources.

For Governmental Relations - Policy Influence, there are perhaps two ways in which this endeavor can be measured: One is a sort of "won-lost" record in which the policy outcomes are evaluated in comparison to the university's desired result. The other is a sort of "activity generated" dimension, in which the number of contact made or the volume of correspondence produced is measured as an indicator of how much effort is exerted to influence policies affecting university interests. With regards to Resource Acquisition, the "bottom line" is the key – in any given year, how much funding and what other resources were received by the university.

External Communications and Relations are communications that are targeted toward an external audience, such as publications—PolyTrends, Panorama, Annual Report and others. This also includes public relations activities and collaborations with community organizations. Outcomes are based on whether our external public feels more connected to the university, whether through participation in an event, through a donation or even a positive impression of the university. Internal Communications and Relations are communications that are targeted toward an internal audience, such as PolyCentric, PolyUpdates, University Marquees, Master Calendar, internal communications e-mails or crisis management across the campus. Measurable outcomes can include the number of web site clicks, e-mails in response to PolyCentric stories or general awareness throughout the campus.

Media Communications Management includes developing relationships with the media, story pitches, press releases, evaluating story effectiveness, experts guide and clips management. News clips and quotes in the media are one specific and measurable outcome of the program.

Visual Identity and Branding includes developing and maintaining the university's Graphic Standards Manual and its implementation on campus. Developing a visual identity and branding begins with the look and feel that's developed through the Graphic Standards. This program is a specifically designed visual identity for the university. It is evident if users are correctly using the right fonts, logos and design.

Development Data and Programming establishes measurable outcomes by the timeliness and accuracy of data delivered. Since all data delivered is for fund raising purposes, its outcome becomes a critical step in creating opportunities to raise more dollars. IT Maintenance and Support establishes measurable outcomes by ensuring that all electronic equipment used in the business of advancement functions properly and are available for

users in the course of their work as fund raisers. Its smooth function of said equipment becomes the basis to measure outcomes.

The division has specific responsibilities for three community-based programs, all with a unique charge in support of the university. In Partners in Education, outcomes and fund raising projects are measured on a case by case basis by the amount of funds raised, internships opportunities and the number of students served. Outreach efforts would be measured by the effectiveness of the communication to the community. Within the National Development Council (NDC), measurable outcomes will include number, stature/influence, level of participation and effectiveness of NDC members. The University Educational Trust (UET) establishes policies and guidelines to measure endowment investment performance, which is reviewed by the board on a quarterly basis. The UET board approves other endeavors with objectives and goals specifically defined. The President's Council measures outcomes by the number of new and renewing memberships and additional scholarship support contributions.

The Annual Fund uses statistical information provided to assess how certain segment groups, callers, calling times, and other factors contribute to establish outcomes. The Annual Fund also uses prior year's results and industry fundraising standards to establish goals.

Gift Processing is responsible for handling and recording gifts to the university. Individual gifts are processed on a daily basis and the transaction is recorded in the Viking database. This individual transaction is the basis for recording a defined set of alumni and donor information surrounding the gift event. Outcomes include the provision of gift receipts for tax purposes to every donor along with a timely acknowledgement. Further, a range of summary reports are then provided to NACUBO/CASE and form the basis for the VSE report which is annually sent to the CSU Chancellor's Office.

## **II How does this program measure its success?**

The development programs are reviewed and evaluated on an annual fund-raising plan as designed in conjunction with the respective dean/director's direction and oversight. For the development officers, the effectiveness and appropriateness of fund-raising strategies related to the plan is measured in conjunction with the plan's adherence to the university advancement prospect management system guidelines and assignments. The development programs are evaluated on their success in meeting fund-raising targets, moving prospects to donor status, and effectively engaging constituents in support of the University.

- Allow the development officer to exercise his or her judgment and for the supervisor to track the exercise of that judgment over time.

- Determine if the development officer has the right prospect load, is focusing on all phases of the development cycle from identification to stewardship, and has thought through the next steps for various prospects at various phases.
- Establish a baseline of expectations from which performance can be monitored and measured:

Continuous feedback is provided to the deans and development officers on each program during the year. Results are communicated to the vice president for university advancement and president as to the effectiveness and appropriateness of individual and aggregate college fund-raising planning, goal setting and progress towards achieving goals.

The VPUA Administrative Operations measure success by meeting the stated goals and objectives established at the beginning of the year with a balanced year-end budget.

The SAA and BroncoStampede measure success by number of well qualified student leader applications on an annual basis, the number of students involved in these organizations who graduate and go on to join the alumni association; donate money to the university, etc and the number of on campus entities requesting the participation of our student leaders. In Bronco Mentoring, it is by the number of alumni who are registered and actively mentoring a student, the number of mentors who are donors, being cultivated for a donation or being stewarded and the number of donors who work for companies that are employing our students and new grads.

Criteria to measure the effectiveness of the Alumni Association is based on several factors including, net income, participation, memberships/donations stemming from event. External reports, studies and surveys through the chancellor's office, CASE etc. also provide standards and suggestions for comparison.

For the Alumni Outreach and Recognition success is measured by the number of faculty who host an alumnus/a; the number of alumni who volunteer and number of classes taught by an alumnus during a one-week time span in May (Professor for a Day). In the Distinguished Alumni Awards event, success is measured by the achievements and success of the honorees, number of Deans or Directors of Development who nominate a Distinguished Alumni, number of participants, number of tables sold for the event all measure the success of the event. Amount of money raised by the honoree and/or their respective company or organization as a result of our distinguished alumni being honored is also taken into consideration.

Within Special Events and Special Projects, success is measured by attendance, positive feedback and attaining desired development results. These results could include an increase in annual giving and new constituents/prospects. Special projects can have a long-lasting effect on the campus, including beautification of the landscape, updating or remodeling. For the Licensing of Facilities/ Events & Filming program, success is measured

via usage and demand, an annual increase in income, customer satisfaction and increasing revenue for various campus departments.

For Governmental Relations - Policy Influence, this would most likely be done in terms of whether the decision-makers we contacted were persuaded to support our interests. However, because much of this policy-influencing effort is tied to CSU priorities, statewide outcomes may not always coincide with local results. In some respects, a qualitative measurement of relationships with decision-makers is a more appropriate indicator than a “won-lost” measurement. With regards to Resource Acquisition, success is measured in terms of resources actually received, and to some degree, by the increasing level of resources received from one year to the next. Some less tangible dimensions may also be involved, such as establishing or improving relationships with decision-makers who can assist the University in acquiring additional resources.

External Communications and Relations measure success in a number of ways, including its respective impact on the audience. For example, PolyTrends magazine, which is sent to alumni, donors, legislators and friends, features an envelope for gifts. Each year, we collect \$10,000 to \$20,000 in donations. We receive feedback from our readers on a regular basis. Internal Communications and Relations tools such as PolyCentric, PolyUpdates and the University Marquees receive dozens of e-mail submissions each week, which point to the success of the program. When we recently featured a video of running horses on the University Marquees, we received many e-mails and calls from across the campus. We can count each communication toward the success of the program.

Media Communications Management success can be quantified by column inches, especially of positive stories. Also, when media actively seek us out for expert quotes or story ideas, the more we can count on the success of the media program.

The success of Visual Identity and Branding is found if the university's image is easily and consistently observed by the internal and external publics. The more we repeat and correctly use the university's visual images, the more we will contribute to its successful implementation.

For Development Data and Programming success is measured by fulfillment of data delivered according to user specifications. In IT Maintenance and Support, success is measured by minimal down time of equipment used in the course of Advancement work.

In Partners in Education, the board identifies and approves projects/programs that they will spearhead during the year. Success is evaluated on the accomplishment of goals and objectives established for each project. Within the National Development Council (NDC), success can be measure by a high number of individuals that accept the invitation to join (anywhere from 35-50).

The University Educational Trust (UET) measures its success based on the performance of the endowment portfolio as well as the amount of endowment revenue generated. The goal is to distribute up to 5% of the earnings gained from the university's endowment portfolio

during the fiscal year. Last year, the university received \$1.1 million from endowment earnings to support scholarship awards, internships, equipment, program support, etc. The President's Council measures success by providing 24 scholarships to high-achieving students each fiscal year (\$60,000 annually).

The Annual Fund measures success by comparing current results with the prior year(s). The overall goal of the program is to do better than the prior year while exceeding industry standards. If that has been accomplished, then it was a successful fundraising year.

Gift Processing measures its success by accurately recording gifts based on CASE Standards and following IRS guidelines for non-profit charitable contributions. Correct and timely acknowledgements, accurate receipts for tax purposes, and automated processing of donations to the Cal Poly Pomona Foundation are all functional successes of the program. *The program ultimately serves as a barometer for measuring the success of each unit-based development program on campus.* The data generated from this program's processes provide comparisons of prior month-to-date and year-to-date of total giving.

### **III What type of assessment tool would you use to review this program?**

For development programs, benchmarking of previous year's performance along with industry standard expectations for program performance is used. Quantify but not by imposing unrealistic or arbitrary standards on the development officer. For performance management (prospect racking using benchmarking):

- Days in Stage (Stage Aging/Moves)
- Number in Stage (Portfolio Balance)
- Contact Activity (Number/Type)
- Proposals Submitted (Asks)
- Proposals Funded (Dollars Raised)
- Strategies/Tasks

Development officers are asked to exercise judgment and to establish reasonable goals and targets. In assessment, the leadership will determine if the numbers represent modest, reasonable or aggressive goals. Metrics can be applied to the development process after an ethical framework has been set and the development officer has been allowed to set goals based on the maturity and sophistication of the operation for which he or she is responsible.

The VPUA Administrative Operations uses an annual plan for the division as an assessment tool, as well as the MPP work plans, and grading the success of each plan.

The SAA and BroncoStampede uses exit interviews for graduating seniors. In Bronco Mentoring, assessment tools include surveys for alumni mentors who opt-out of program

after 3 months to a year. All surveys would contain a Likert scale as well as open ended questions allowing for feedback it is by the number of alumni who are registered and actively mentoring a student and the number of mentors who are donors. Assessment tools to measure the effectiveness of the Alumni Association include a narrative essay which includes a cost benefit analysis.

Alumni Outreach and Recognition use surveys which include a Likert scale and open ended questions are given to faculty, students and alumni participants. Feedback from participants, Directors of Development is usually collected (informally) after event. The Alumni Association Board of Directors also offers suggestions, and guidance in regard to improving the program.

Special Events and Special Projects assess by review and a comparison of the past year's outcomes. The team also conducts a market analysis by surveying those we assist with development events. For the Licensing of Facilities/ Events & Filming program, assessment tools include soliciting input from customer base and measuring marketing ratios to new business.

For Governmental Relations - Policy Influence, the most effective assessment tool is financial accountability. Qualitative assessments of the relationships with decision-makers are also useful. With Resource Acquisition, the use of both a quantitative measure comparing policy outcomes with university preferences and a qualitative measure of relationships with decision-makers are appropriate.

External Communications and Relations uses publication surveys to determine how our audience evaluates our publications. The leadership also uses the envelope in our publications as a means of assessing success. Internal Communications and Relations tools such as PolyCentric, PolyUpdates and the University Marquees frequently receives direct feedback from the university community. This assessment provides the basis for content direction and focus. For Media Communications Management, column inches are the most popular assessment tool, but success is also measured by keeping things out of the media. Assessment of Visual Identity and Branding is based on the frequency of the application of the University Graphic Standards. This is constantly evaluated throughout campus.

For Development Data and Programming, assessment through feedback continually modifies our activities for continuous improvement. It provides a basis to know whether programmers are asking the right questions to target the data requested accurately. This becomes the main focus in improvement; to provide accurate data in a timely manner. This also applies to IT Maintenance and Support, with direct feedback from users of UA equipment. Equipment either works as designed or it doesn't. If equipment is not working properly, feedback is usually forthcoming quickly. Solutions to IT-related problems become another assessment tool used to review the program.

In Partners in Education, assessment tools include the amount of funds raised for any fundraising initiative, the number of scholarships provided to student teachers, the number of

internships provided to students and increased communication from the university to teachers in the community. The National Development Council (NDC) tracks numbers and the various avenues they have assisted in the philanthropic support of the university.

The University Educational Trust (UET) assesses by the overall endowment performance (which includes an evaluation of investment advisor's performance and the performance of other CSUs). The President's Council now uses survey students to determine how to improve communication for scholarship programs.

The Annual Fund has traditionally used information provided by specialized software programs as well as prior year performance against industry standards.

Gift Processing has recently created new processing procedures for a quick centralized depositing system and a 24-hour turnaround time for mailing out tax receipt letters to donors. A common gift receipt and acknowledgement letter has ended the disparity in acknowledgement information that existed prior to July, 2006. Daily assessment of the program is achieved by review of the deposit gift report to ensure 100% accuracy of the process. Weekly assessment is provided to the individual colleges and campus units for continual external review of the gift processing program.

#### **IV How would assessment modify activities for continuous improvement?**

Assessment plays a key role in advancing effective development programs. For example, in order for the prospect management system to be used as an effective tool, each development officer is responsible for providing contact reports on all action taken with assigned prospects and candidates. Contact reports are used to measure productivity and help maintain the historic relationship of the prospect or candidate with the institution. Active participation by all development officers ensures a more informed staff and effective fund-raising program. Contact reports are submitted through the Viking system. To facilitate the distribution of information and modify activity, the AVP, Prospect Management and Research meets bi-monthly with each development unit to review, update, or clarify the prospect lists. The following reports are to be used with all development program activities:

##### Weekly

- Open action report

##### Monthly

- Cleared prospect lists
- New assignment report
- Staff Reports (Actions, Moves, Contacts, Summary)
- Management (past due actions, open/pending solicitations, gift/pledge report)

### Quarterly

- Top 25 Status Report: Shows each Top 25 proposal assigned to a fundraiser, the current status, and last (5) contacts or any contacts made during that fiscal year.
- Contact Activity Report: Shows the number and type of contacts made by a fundraiser for the fiscal year.
- Proposals Submitted Report: Shows details on each proposal submitted during the fiscal year, whether or not they are a Top 25 proposal.

For the VPUA Administrative Operations, awareness of goals and objectives (as stated in plans) that did not accomplish desired positive outcomes and the necessity for revision of projects or rejecting for future years and focusing on alternative ways to accomplish desired outcomes.

In the SAA and BroncoStampede recommendations from student focus group would be presented to Alumni Association and staff twice a year for their review. In Bronco Mentoring, feed back in regard to the program is essential. All comments in regard to improving the portal, marketing and recruitment have been presented to staff and/or the outside company that created it. The Alumni Association must approve funding for all programs and events. Funding is contingent on the event or program's revenue and participation history as well as the potential to engage alumni, raise funds or promote goodwill.

For Alumni Outreach and Recognition, assessment could (and has) determined time of year to do the event, how to recognize participants, when and how to market this event and the content of the program. It also has helped determine better criteria for awards, time of year and location for the event.

Special Events and Special Projects use the assessment tools to determine what modifications are necessary and making necessary adjustments in areas where needed. The same applies to the Licensing of Facilities/ Events & Filming program, but also add the implementation of new methods which streamline processes.

For Governmental Relations - Policy Influence, reduced success in acquiring resources should (and would) trigger analysis of causation. And since in any given year there could be several explanations for such results, the specific reasons identified for reduced success would have to drive modification of subsequent strategies. The same would hold true for diminished quality of relationships. In both cases, identification of problems or challenges would directly drive strategies for improvement. With Resource Acquisition, if qualitative measurements indicated declining relationships, careful analysis of the causes of such a decline would have to be performed and adjustments accomplished in light of that analysis.

So many complex factors determine a decision-makers vote that quantitative assessments are often not very useful. If we, either the campus or the CSU system, were continually on the losing end of decision-makers' votes, that should prompt very careful analysis of both the positions being advocated by the university/system and the strategies being employed to achieve policy influence.

If the university is receiving fewer and fewer gifts, the leadership would determine how/why this is happening and look for opportunities to make positive changes in External Communications and Relations. Internal Communications and Relations tools require change to be effective. PolyCentric will undergo a redesign in spring 2007. Readers will evaluate and provide feedback regarding the needs of certain sections. With Media Communications Management's use of column inches, modifications can be quite simple. If pitches do not generate, we must reevaluate the strategy. Assessment of Visual Identity and Branding has resulted in the need to offer workshops to help users understand the graphic standards correctly while a best practices website may also be useful to encourage the correct use of the standards. Also, standards can and have been improved upon. In April 2006, we issued a new and improved Graphic Standards Manual online and will continue to send out improvements depending on feedback from users.

For Development Data and Programming, assessment feedback can continually modify the activities and address continuous improvement. It provides a basis to know whether programmers are asking the right questions to target the data requested accurately. This becomes the main focus in improvement; to provide accurate data in a timely manner. This also applies to IT Maintenance and Support, by providing a basis to know the IT professionals are using reasonable and established methods to maintain equipment, servers, cell phones, etc., and keep them in running order for all staff members. Performing routine maintenance and giving direction to users on the best use of equipment becomes a way to continually improve this program.

In Partners in Education, the assessment tools will enable the board to identify those projects that better serve the university, its students, and the community. For the National Development Council (NDC), a member in name only (*one that does not actively participate*), is of no benefit to the goals of NDC, therefore assessing each member's contributions are essential. Active participants benefit the university through guidance, collaboration, and support and it is necessary to constantly be aware of individuals to recruit for the benefit of NDC and the university.

For the University Educational Trust (UET) assessment tools will provide the UET with feedback from the university and would enable the auxiliary to better serve the students, faculty and staff. The tools will allow the President's Council to identify new marketing and communication methods to ensure students are notified of the scholarship program.

As mentioned above, the Annual Fund has traditionally used information provided by specialized software programs as well as prior year performance against industry standards. This creates a viable assessment tool of the student callers. Through formal or informal coaching, callers can increase their pledge rate and average pledge.

With the high volume of gifts that are daily received through Gift Processing, improvements in the time it takes to prepare deposits, complete gift entry, and finalize reconciliation now is especially crucial to ensure that the high volume of gifts that is expected in a campaign can be accommodated. Based on this continuous assessment the program can effectively plan to increase the number of staff members this program will need to meet the demand. For example, prior assessment has dictated that cross training among the staff is a key component necessary to increase productivity to keep up with the potential high demand of gift processing

## **V How does this program engage the entire campus community by intentionally creating opportunities for collaboration?**

All development programs are housed within the college/division or unit they support. Alumni and donors have distinct relationships and ties to faculty, departments, and programs that can be best leveraged through heightened collaboration with individual faculty, staff, and students, through one-on-one contact opportunities. Each development program also collaborates with other divisional departments such as prospect research/management, information systems, public affairs and alumni affairs to ensure that the best level of support, training and assistance required by the fund-raising professionals is met.

In VPUA Administrative Operations, the division engages, cooperates and collaborates with other divisions constantly for various campus-wide initiatives and programs, as well as the overall mission of the university. Advancement provides services to the campus community and also receives numerous services from other departments and divisions creating collaborative relationships that benefit all.

In the SAA, nominations are submitted by faculty and staff. All nominators are invited to the Annual SAA Induction Ceremony (April 12). SAA members also participate and assist on various events and programs through Alumni Affairs and UAD. The BroncoStampede was created and is managed by Alumni Affairs (University Advancement) and the Visitor's Center (Student Affairs). Members are available for tours and donor visits for each college. For the Mentor Program, collaboration with alumni is essential. Eventually as this program grows it will be available to faculty for classroom assignments, research, etc.

The Alumni Association oversees several special interest and academic chapters. These alumni chapters include ASI, College of Business Administration, Collins, Hispanic, Urban and Regional Planning, Rose Float, Lambda, Ornamental Horticulture and CLASS. Coordination of events and outreach of the chapter programs are facilitated by Alumni Affairs with input from the academic department, center or organization that the chapter is affiliated with. The Alumni Association also underwrites many of the costs related to chapter events. The Alumni Association also participates in on-campus events and

activities such as BroncoFusion, Grad Fair and Commencement. They consistently support the various cultural celebrations and provide over \$10,000 in student scholarship.

For Alumni Outreach and Recognition, alumni participation in the Professor for a Day Program is contingent on number of faculty willing to host an alumnus/a in their classroom. Liaisons from each college work with faculty, alumni, and the office of Alumni Affairs to coordinate visits. A luncheon is held in conjunction with this event for faculty, alumni the liaisons, deans and student alumni association members. Within the Distinguished Alumni Awards event, Directors of Development and/or Deans work within their respective college or school in the selection of an honoree. The event brings together faculty, administration and alumni.

The Special Events program enables various colleges and departments to pool their resources and appeal to larger audiences, saving time and money while building partnerships. Presenting events that solicit the engagement of a broad range of the campus community; including student clubs, staff members, faculty and special interest groups as volunteers for various events while also promoting our division's mission and goals which ultimately serve to support the campus community and the university's future growth.

Special Projects naturally engage a broad range of the campus community; including student clubs, staff members, faculty and special interest groups as volunteers or participants, providing a central place for various *special circumstance* situations to be coordinated or reviewed for further consideration as a project.

Licensing of Facilities/ Events & Filming program enables various colleges and departments to offer their areas/venues for lease while providing the opportunity for exposure and additional income.

Since much of Governmental Relations - Policy Influence involves the advocacy dimensions of university and system-wide mandates, it is frequently the case that policy influence engages students and alumni, faculty, staff, and University supporters. In virtually all dimensions of Resource Acquisition, deriving resources from governmental entities is a function of having compelling and feasible projects to fund. Identification of fundable projects, development of proposals, and modification of requests become a long-term process that often extends across several years. While the governmental affairs office becomes the point of contact in many such endeavors, the essential involvement of deans and department chairs in the process is inevitable. While student involvement is not always present or appropriate, this aspect of campus collaboration frequently presents itself as an added dimension to what is being done by faculty and administration.

In External Communications and Relations, publications are a reflection of the university: what is happening, who's doing what, etc. They are written about the collaborations happening across the campus and we work hand-in-hand to tell the stories and share it to our publics. The Internal Communications and Relations enjoy a successful reputation by our campus community. They are the result of collaboration, as we cannot inform our campus if we do not receive input and information from many.

Media Communications Management is about uniting faculty/staff and university excellence with the media. This partnership is essential in order to gather story ideas and background information that is useful to the media. A lack of collaboration will hinder our media program and hurt our media relationships.

The Visual Identity and Branding program engages the entire campus community because all entities are encouraged to use it consistently.

Development Data and Programming engages the campus through committees designed to improve the user experience with the data itself. The BroncoData project with its various committees is a means by which this program engages all users data collaboratively. This also includes other programmers in different divisions. This is done intentionally to create data opportunities for customers of Advancement data.

IT Maintenance and Support engages the campus through committees designed improve the user experience with IT itself. The *Techgroup* is a committee of campus IT professionals who meet to discuss best practices and best ways to ensure minimal downtime of various IT equipment. This is a collaborative effort to gain economies of scale as well as partnerships with other IT professionals, especially those who house.

Partners in Education serves as an advocacy group in support of the teaching profession through collaboration between schools, families, and local communities. The board seeks counsel, advice, and coordination with the deans of Education, Science, and Letters Arts & Social Sciences regarding all PIE projects. The National Development Council (NDC) will collaborate across the university by providing the high-level of expertise and influence of NDC members to all areas of the university. Members of NDC will be called upon throughout the year by the presidents, vice presidents, deans and other senior administrators.

The University Educational Trust (UET) board consists of one faculty representative nominated by the Academic Senate and one student representative nominated by the Associated Students, Inc. These members serve on the board to provide enhanced communication and collaboration between the UET and their respective constituencies. Fund-raising events such as Founders' Celebration have engaged the entire campus community. In the President's Council, scholarship awards are designated to each and every college as well as two general scholarships to recognized outstanding student achievement. Faculty are involved in preparing recommendation letters as well as participating on the scholarship selection committee with community representatives.

The Annual Fund focuses on college and unit priorities, engaging academic and administrative leadership in identifying key opportunities and projects that will best resonate with the philanthropic spirit of our alumni and friends. From calling programs, to direct mail and donor stewardship, students are engaged in the process and create the enthusiasm which continues to attract supportive alumni.

Every college and administrative or support unit that participates in community relations, outreach and resource acquisition collaborates with Gift Processing. Continuous communication and collaboration with Gift Processing occurs when a gift designated to a specific unit or college is received, deposited and acknowledged. The gift processing department engages with ASI, the Foundation, and University Educational Trust to ensure that gifts received through these auxiliary programs are properly recorded and acknowledged

## **VI How does this program address staff requirements and their other responsibilities?**

In Development Programs, collaborative activities such as DOD meetings, Prospect Management meetings, and valued added consultations provide a strong base of peer and professional support for program staff in meeting their responsibilities. In addition to collaborative efforts within the University Advancement Division and Development Programs, staff is encouraged to keep centered on the best practices and peer learning opportunities within the CSU, Council for Advancement and Support of Education, Association of Fundraising Professionals, and others. Each development program officer and their staff is annually encouraged and supported to enhance skills and training

There is a limited team within VPUA Administrative Operations, including the vice president, administration and budget manager, executive assistant and administrative support. Nonetheless, extended education opportunities are extended to each of them in enhance their skill sets.

The significance of the SAA, Bronco Mentoring and the BroncoStampede is reflected by the need of a dedicated staff member (Assistant Director for Alumni Affairs) has been hired to recruit mentors through direct mail campaigns, employer visits, career fairs, etc. This individual is also responsible for 50% of the oversight for the BroncoStampede (the other 50% through Student Affairs) and serves as the advisor to the Student Alumni Association, assisting with recruitment, providing training, attending district and international conferences, etc.

The Director of Alumni Affairs spends approximately 75% of her time overseeing the activities, events, programs, membership campaigns, committees, etc. related to the Alumni Association and chapter program.

For Alumni Outreach and Recognition, the alumni director oversees all events with assistance from the Administrative Analyst (in regard to budget) and Administrative Coordinator (logistics).

Special Events and Special Projects provide a stimulating and aggressive work environment whereby staff are able to demonstrate their skills and ability to excel in many areas. Licensing of Facilities/ Events & Filming creates the need for staff organizational and methodical skills while providing a valuable service to the university

This program also develops interpersonal relationships with all areas of the campus community.

Governmental affairs (Governmental Relations - Policy Influence and Resource Acquisition) is pretty much a one-person operation, with the director organizing other University staff (from the President on down) to engage in the various aspects of what is required to obtain the desired resources. If the question involves staff needs in the various projects for which this office seeks resources, the answer is that it depends on the demands of the project – sometimes funding includes personnel costs and support, but not in every case.

Within External Communications and Relations and Internal Communications and Relations, The director assigns and edits stories, a senior writer is responsible for writing a main story plus a few others; the photographer is responsible for taking appropriate shots and the designer is responsible for the look and layout of the publication. Publications are a collaborative effort.

Media Communications Management is the main job responsibilities of the senior media specialist, who devotes nearly her full-time duties to managing the program, with input and direction from the AVP.

Development Data and Programming has two career-level full-time programmers to provide data to data users. Their responsibilities entail data management as well as data mining of existing data for clarity and cleanness parity checks. This also applies to IT Maintenance and Support has one career-level full-time Information Technology Consultant and one expert level full-time Information Technology Consultant to provide technology assistant to users. Their responsibilities pertain to IT support and consultation on software and hardware upgrades and acquisitions, as well as web servers, equipment used in the course of Advancement work.

Within Partners in Education, board members are responsible for various project assignments. University Advancement provides administrative support for board meetings, assistance with campus contacts, and other requests as needed. For the National Development Council (NDC), activities and membership requirements will be addressed through the vice president of university advancement office.

For the University Educational Trust (UET) and the President's Council, University Advancement provides administrative support for the President's Council in the form of membership renewals, scholarship administration, and event coordination.

The Annual Fund holds weekly meetings with staff to address any shift in responsibilities or added requirements that may occur. These weekly meeting are used to discuss ways to increase morale, better coach callers, or discuss issues or questions that may arise. Each staff member is given a caller manual when hired. The manual contains valuable information regarding personal policies in place, raise criteria, performance review criteria, attendance expectations, and methods into help increase caller performance. When a

student is promoted to the management team they are given a training session along with a manual that lays out specific responsibilities and expectations.

The Gift Processing program is focused on keeping an accurate donor gift entry database and reporting. It is a customer service oriented program which involves a high degree of communication with the various college staff members to answer any questions regarding gifts, deposit accounts, and/or donor information. Staff is trained in current Division, Campus, and CSU procedures and best practices. Awareness of IRS guidelines and rulings are also shared with staff to educate and promote a positive understanding of our responsibility to our constituent alumni and donors.

## **VII How does this program recognize and reward?**

In Development Programs, development staff are recognized and rewarded on a number of variables including teamwork, effective and conscientious stewardship, number of prospect contacts, number of well-crafted solicitations (whether or not they were successful), imaginative identification strategies, and creative cultivation strategies and approaches. Specific reward is given to those who are mindful of, and productive in advancing the various phases on the development cycle while adhering to institutional priorities and values.

All recruitments, reclassifications, in-range increases, service awards and professional development are coordinated through VPUA Administrative Operations, as well as funding allocations for operations and special projects. The division also bestows an Annual Award of Excellence to a member of the division, as well as a member of another division who has collaborated with the division, to recognize and show appreciation for all their efforts.

At the SAA's annual Induction Ceremony, students are presented with a polo shirt, alumni pin, etc. Members are invited to all alumni outreach events, eligible to receive scholarships through the Alumni Scholars Program, and able to attend district and national conferences. Active members are presented with an honor chord prior to commencement. With BroncoStampede, members receive a paid stipend (quarterly) for their service and are presented with a blazer and polo shirt. The mentors are invited to attend the Alumni Association's Annual Meeting at Kellogg House Pomona (June 14). Upon checking in, they will be recognized with a mentor ribbon and during the program will be presented with a certificate.

An important component of the Alumni Association is the Annual Meeting (held in June) for recognition. Incoming directors are recognized and outgoing directors are honored. Chapter leaders and scholarship recipients are also recognized and honored at this event.

In Alumni Outreach and Recognition events, alumni guest professors (Professor for the Day ) are presented with small gifts, commemorating their experience. Faculty members are also presented with a small token of appreciation, thanking them for hosting our alumni. Within the Distinguished Alumni Awards event, each honoree is presented with an award at

the Annual Distinguished Alumni Awards event (April 27). Their bio is printed in a program, they are featured on our website and Poly@lumni and their name is printed on a plaque outside of the office of Alumni Affairs

The Special Events, Special Projects and Licensing of Facilities/ Events & Filming programs are currently evaluating ways to recognize staff achievement for excellence. In the past year, the special event coordinator was recognized with a division award for her commitment and job performance.

As mentioned above, Governmental affairs (Governmental Relations - Policy Influence and Resource Acquisition) is a one-person operation. Through excellent work, the position has benefited from increase responsibility and has been able to elevate his career.

The External Communications and Relations and Internal Communications and Relations, programs have won over 60 national/regional awards for its publications. The Media Communications Management professional has also been recognized for outstanding work in her field.

Via Development Data and Programming and IT Maintenance and Support staff have been recognized via various divisional opportunities, including staff achievement awards, retreats, breakfasts.

Within Partners in Education, outstanding student teachers are recognized through scholarship awards. Board members are recognized for their achievements in their communities. The National Development Council (NDC) has not formally met so their outcomes will be available next year.

Each year, the President's Council recognizes 24 outstanding students by providing \$60,000 in scholarship awards. University Educational Trust (UET) fundraising events such as Founders' Celebration have provided revenue to the university in excess of \$1.8 million.

Student Callers in the Annual Fund are rewarded and recognized for the performance through the use of shift awards. Each night the callers who performed well are given a shift award. Announcements are made in shift opening and all co-workers provide strong peer recognition for the caller. We also require that all callers acknowledge those who secure pledges on the floor and this leads to an increase in shift morale. We provide bonuses for callers who consistently achieve a high level of success. The bonuses are given out monthly for pledges over \$100, credit card gifts over \$25 and matching gifts over \$25. For those who may need additional coaching from the student management team or from the Phonathon Coordinator, their demonstrated improvement on performance is given direct acknowledgement and is rewarded by administrative staff.

Gift Processing does spot acknowledgements for observed success. There are annual performance reviews and in-range progressions for increased responsibilities.