

**SUNY Potsdam  
Administrative Unit Assessment Plan**

**Administrative Unit:** Advancement

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**Mission Statement:** The SUNY Potsdam Office of College Advancement, in collaboration with the Potsdam College Foundation, Inc., helps to secure financial resources to strengthen the Potsdam experience and to ensure a transformational education for each student. By facilitating the philanthropic goals of alumni and friends of SUNY Potsdam, we seek to direct the stewardship of interest, time, energy and financial resources in order to promote the academic excellence of the College, and the success of our students.

Goals	Desired Outcomes/Objectives	Assessment Methods and Targets/Measures
<p>1. Development: Solicit alumni, parents, friends, corporations, and foundations for gifts to clearly defined institutional priorities to meet overall dollar and donor goals.</p>	<p>A. Identify and research Major Gift prospects to feed fundraising pipeline            B. Solicit major gift prospects, including individuals, corporations and foundations            C. Acquire, retain and increase Annual Fund for Potsdam donors to provide unrestricted funds for use by campus to meet its greatest needs.            D. Secure Planned Gift commitments to help ensure long-term funding revenue.            E. Coordinate activities with the Potsdam College Foundation, Inc. to include all endowment management and fundraising operations.</p>	<p>1.A.1. Review of unassigned prospects with wealth screening capacities over \$1M and others as identified through a variety of methods as having potential large gift capacities; 100% to be screened through research within 30 days of identification.            1.B.1. Track solicitation dates and amounts; raise defined annual goal, which during campaign includes cash and pledges (see attached fiscal year plan for projected gifts).            1.C.1. Use data analytics results to track goals which are defined annually; raise defined annual goal (see attached Fiscal Year plan for projected Annual Fund gifts).            1.D.1. Track solicitation dates and amounts; target 10+ new planned gift commitments annually.            1.E.1. Review of all written policies and procedures annually; 100% compliance with all gift acceptance policies and endowment management processes of the Foundation and IRS.</p>

<p>2. Alumni Relations: Build and maintain strong relationships with alumni and friends to increase engagement opportunities</p>	<p>A. Provide opportunities and oversee activities of the Potsdam Alumni Association and related alumni groups to further alumni engagement with the college.</p> <p>B. Conduct local and regional events that allow alumni/friends to remain connected with the college and each other.</p> <p>C. Provide communications and information to alumni/friends regarding college happenings.</p>	<p>2.A.1. Track all volunteer activities including board membership; 100% of activities are documented.</p> <p>2.B.1. Track attendance/participation at alumni events; 100% of engagement is documented. (Additional report pending that will show correlation between engagement levels and increases in giving.)</p> <p>2.C.1. Ensure that electronic newsletters, alumni magazines and other communications adhere to defined production schedules; 100% adherence to schedule.</p>
<p>3. Donor Relations/Stewardship: Ensure appropriate acknowledgement and management of gifts to inspire continued and increased giving</p>	<p>A. Implement and manage annual acknowledgement process for all gifts at all levels.</p> <p>B. Oversee on-going management of endowed gifts (scholarships and program funds) consistent with policies set by the Potsdam College Foundation.</p> <p>C. Conduct special events that recognize and steward donor relationships.</p> <p>D. Produce annual reports and communications to targeted groups of donors.</p>	<p>3.A.1. Monitor production of tax receipts; gifts to be receipted within 5 days.</p> <p>3.B.1. Monthly communication with accountholders and bi-annual comprehensive review; 100% compliance with donor intention.</p> <p>3.C.1. Track attendance/participation at events; 100% of qualifying donors to be invited to events; 100% of participation to be documented.</p> <p>3.D.1. Ensure that communications adhere to defined production schedules; 100% adherence to schedule.</p>
<p>4. Advancement Services: Maintain all alumni and donor data for use in fundraising and alumni/friend relations activities</p>	<p>A. Enter and maintain data for all constituents within Banner, accurately capturing all contact and engagement data</p> <p>B. Compile data for use in solicitation and alumni engagement activities.</p> <p>C. Create and produce reports that track alumni and donor activity.</p> <p>D. Produce all external alumni and donor reports as required by SUNY and industry organizations.</p>	<p>4.A.1. Review requests daily; update records within 30 days of receiving data.</p> <p>4.B.1. Review data requests and assess necessary response; full all reasonable requests within a timely manner based upon priorities of office.</p> <p>4.C.1. Create monthly reports; 100% compliance with reporting expectations.</p> <p>4.D.1. Monitor requests for external reports; 100% compliance with report deadlines.</p>
<p>5. Campaign: Oversee a comprehensive campaign process that provides an opportunity to enhance fundraising efforts in order to meet specific identified priorities</p>	<p>A. Produce, maintain and manage campaign work plan based upon defined timelines that drive all gift policies/procedures, fundraising and marketing activities.</p> <p>B. Work with campus to identify funding priorities.</p>	<p>5.A.1. Regular monitoring of plans and procedures in concert with Foundation Board; 100% adherence to plans; (see also attached campaign gift reports with goals and results).</p> <p>5.B.1. Review defined priorities and track fundraising goals; achieve 100% of priority goals.</p>