

**SUNY Potsdam  
Administrative Unit  
Assessment Summary Form**

**Administrative Unit:** *Advancement*

**Unit Contact Name:** *David Davin*

**Date:** *August 1, 2023*

**Phone:** *315-267-2174*

**Email Address:** *davindr@potsgdam.edu*

**Assessment Year:** *2022-2023*

**PURPOSE**

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

**SECTION 1: ASSESSMENT PLAN FOLLOW-UP**

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made.

**Selected Goal**

Pursue growth on various fronts, including; growth in Foundation funds and fundraising, alumni and other constituent volunteers, community and affinity connections, and recruitment/retention for the College.

**Desired Outcomes/Objectives**

- 1a. Increase cash-in fundraising (cash in-the-door per year) to \$3.1M for FY22-23
- 1b. Increase documented gift agreements fundraising (documented multiyear pledges per year) to \$4M
- 1c. Grow overall endowment to over \$45M
- 1d. Increase endowment support of unrestricted support to college
- 1e. Evaluate unrestricted “reserve” support for vital interest of the college (financial stability; retention and enrollment)
- 1f. Partner with alumni and volunteers to increase enrollment and retention

**Related Targets/Measures**

1a1. Method = foundation business office accounting to provide FY-end “cash-in” report; Target = \$3.1 million+ in “cash-in.”  
RESULT: Not Achieved; “cash-in” ended the year down to \$2.6M – we did not reach this goal due to largely external factors

1b1. Method = advancement services office to provide FY-end “pledges received” report; Target = \$4 million+ in pledges for the next 5 years  
RESULT: Not Achieved; We reached approx.. \$2M in pledges received, underperforming our goal.

1c1. Method = FY end audit; Target = overall endowment balance at \$45 million+  
RESULT: Achieved; endowment is over \$45M.

1d1. Method = foundation business office accounting to provide multi-year analysis of unrestricted support to college from endowment; Target = Increase in total unrestricted support from endowment  
RESULT: Achieved; endowment support to unrestricted was up.

1d2. Method = survey college president and president’s council about unrestricted support; Target = Response from survey indicates sufficient support  
RESULT: survey not conducted; will conduct.

1e1. Method = minutes from foundation committee and board meetings; Target = robust discussion, ideation, and execution of actions to take steps to utilizing unrestricted “reserve” funds, as evidenced in meeting minutes  
RESULT: Achieved; a \$1M retirement incentive was approved from these funds.

1f1. Method = document engagements where alumni/volunteers support enrollment/retention efforts; Target = five (5) or more substantial engagements (such as, phonathons to potential students; letter-writing campaigns to potential students; in-kind donation of marketing work; etc.)  
RESULT: Achieved; alumni volunteers participated in phonathons, letter-writing outreach, and in-person event organizing at well over 5 events.

1f2. Method = measure number of potential students reached through alumni/volunteer efforts; Target = 1,000+ potential students reached  
RESULT: Achieved, well over 1000 students were reached.

**Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.**

**WE made progress, as can be seen above, but came short on two important goals; overall cash-in and documented pledge activity. With fundraising activity picking up within our development office, we hope that increased activity will buoy both of these metrics in the next FY.**

**Based on the assessment data and information shared above, what planned actions were or will be taken as a result?**

**Increased assessment and accountability of development officers. Work is currently underway with our CRM to do just that.**

## **SECTION 2: ADDITIONAL ASSESSMENT ACTIVITY**

I've continually monitored our unrestricted endowment gift and did a deep analysis of how to achieve the desired result when it looked like we might come up short on our goal. As a result, we were able to achieve our result by uncovering additional revenue sources from the endowment.