

SUNY Potsdam

Administrative Unit Assessment Report and Improvements

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	Results	Planned Improvements Based on Assessment Results ¹
1. Development: Solicit alumni, parents, friends, corporations, and foundations for gifts to clearly defined institutional priorities to meet overall dollar and donor goals.	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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. 1.C.1. Use data analytics results to track goals 	<p>Fundraising continued after the completion of the last campaign, primarily for endowment, including 6- and 7-figure gifts. We continued to meet and exceed annual fundraising goals, despite circumstances out of our control. Progress was severely limited due to lack of staff, budget resources and insufficient research capabilities. Departments became siloed and a unified mission and goals were</p>	<p>Increase size of travel fundraising staff; replace outdated customer relations management technology; improve donor research capabilities through technology like LinkedIn; reorganize department structures; increase emphasis on annual, unrestricted, and deferred giving; create fundraising marketing program; expand metrics for evaluation; involve College president in active fundraising; expand annual fund into social media</p>

¹ Student complaints and resulting program improvements must be included here.

		<p>which are defined annually; raise defined annual goal.</p> <p>1.D.1. Track solicitation dates and amounts; target 10+ new planned gift commitments annually.</p> <p>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>	lacking.	
2. Alumni Relations: Build and maintain strong relationships with alumni and friends to increase engagement opportunities	<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.</p> <p>2.C.1. Ensure that electronic newsletters, alumni magazines and other communications adhere to defined production schedules; 100% adherence to schedule.</p>	The Alumni Relations program moved forward, engaging alumni and tracking activities as limited program resources allowed. More alumni were engaged, leading to increasing volunteer opportunities, and moving prospects into the giving cycle.	Stabilize positions with time fully dedicated to alumni activities; increase program resources for events and engagement; expand into virtual and social media engagement; upgrade customer relations management capabilities; define metrics for program evaluation; connect program more closely to annual giving program
3. Donor Relations/Stewardship: Ensure appropriate acknowledgement and management of gifts to inspire continued and increased giving	<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</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</p>	The donor relations/stewardship program was very successful managing an increasing number of endowed funds and producing special events as limited resources permitted. Annual gift acknowledgements and donor impact	Increase staff and fully dedicate time to relationship/stewardship activities; increase funding for events, donor reports and individualized donor recognition; new platform dedicated to tracking endowed funds and reporting; upgrade customer relations management capabilities

	communications to targeted groups of donors.	attendance/participation at events; 100% of qualifying donors to be invited to events; 100% of participation to be documented. 3.D.1. Ensure that communications adhere to defined production schedules; 100% adherence to schedule.	reports kept donors engaged and moved relationships forward.	
4. Advancement Services: Maintain all alumni and donor data for use in fundraising and alumni/friend relations activities	A. Enter and maintain data for all constituents within Banner, accurately capturing all contact and engagement data B. Compile data for use in solicitation and alumni engagement activities. C. Create and produce reports that track alumni and donor activity. D. Produce all external alumni and donor reports as required by SUNY and industry organizations.	4.A.1. Review requests daily; update records within 30 days of receiving data. 4.B.1. Review data requests and assess necessary response; full all reasonable requests within a timely manner based upon priorities of office. 4.C.1. Create monthly reports; 100% compliance with reporting expectations. 4.D.1. Monitor requests for external reports; 100% compliance with report deadlines.	The advancement service area performed well in maintaining and updating alumni and donor data, primarily on a reactive basis to information. An antiquated customer relations management platform hampered efforts to respond to alumni office and fundraising needs.	Install new customer relations management platform; align department more closely with gift planning department; begin using data analytics tools to identify donor prospects; conduct proactive prospect research; screen data on a regular basis
5. Campaign: Oversee a comprehensive campaign process that provides an opportunity to enhance fundraising efforts in order to meet specific identified priorities	A. Produce, maintain and manage campaign work plan based upon defined timelines that drive all gift policies/procedures, fundraising and marketing activities. B. Work with campus to identify funding priorities.	5.A.1. Regular monitoring of plans and procedures in concert with Foundation Board; 100% adherence to plans. 5.B.1. Review defined priorities and track fundraising goals; achieve 100% of priority goals.	The "Take The Lead" fundraising campaign was completed very successfully in 2016, surpassing the original goal with a final total of \$32.5 million. Unfortunately, lack of program resources after the campaign stifled efforts to maintain and grow the alumni relations and fundraising programs. However, a work plan for the next campaign	Implement improvements as noted to prepare for the next fundraising campaign scheduled to start a quiet phase in 2022

			has been developed to guide early preparation efforts including infrastructure improvements, guideline revisions, priority identification and consultant selection.	
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