

University of Louisiana at Lafayette

Detailed Assessment Report 2015-2016 Development

As of: 11/18/2016 11:01 AM CENTRAL

(Includes those Action Plans with Budget Amounts marked *One-Time, Recurring, No Request.*)

Mission / Purpose

To provide opportunities for students by actively engaging constituents who can provide funding for initiatives. Current initiatives include a \$4.5 million scholarship campaign and a \$2 million museum operating fund campaign.

My name is misspelled in this document: Darleen Lugenbuhl is the correct spelling.

Other Outcomes/Objectives, with Any Associations and Related Measures, Targets, Findings, and Action Plans

O/O 1: Staff Increase

Increase Development staff from three to five by hiring two additional fund raisers.

Related Measures

M 1: Publicize & Hire New Positions

Advertise openings in the development office and hire 3 new FTEs including the Executive Director of Development, Director of Annual Giving and new Director of Development (Liberal Arts, Science and Education colleges).

Source of Evidence: Administrative measure - other

Target:

Advertise in three local sources and four national sources.

Finding (2015-2016) - Target: Met

New Executive Director of Development hired in November 2016.

New Director of Development hired in Fall 2016 for Liberal Arts, Science and Education colleges.

New Director of Annual Giving hired in Fall 2016.

O/O 2: Donor Cultivation

The backbone of a successful fundraising operation focuses on effective execution of the donor cultivation process where development officer activities and goals can be mapped.

This is often referred to as the development or donor cultivation cycle. The process has four phases: Prospect Identification, Cultivation, Solicitation and Stewardship.

Development officers will be measured on the number of times they interact with a donor/prospect as it relates to these 4 phases in the donor cycle.

Related Measures

M 4: Total number of Contact Reports - Face-to-Face Meetings

Total number of face-to-face visits with donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship).

Face-to-face visits will be tracked in Millennium by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show

activity towards goal.

Source of Evidence: Activity volume

Target:

400 face-to-face meetings

Finding (2015-2016) - Target: Met

Total Number of Contact Reports or Face-to-Face Meetings with Donors and Prospects: 419

M 5: Total number of Contact Reports - Other Contacts

Total number of phone calls, emails or events attended with donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship). These types of interactions are called "Other Contacts" will be tracked in Millennium by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal.

Source of Evidence: Activity volume

Target:

300 Other Contacts in FY15/16

Finding (2015-2016) - Target: Met

Total Number of Other Contacts - 363

O/O 3: Fundraising Activity

Secure private funds (unrestricted and restricted) from alumni, friends, corporations and foundations that will assist the university, colleges and units in achieving their goals.

Related Measures

M 2: Annual Fundraising Production Goal

Annual Fundraising Production includes all philanthropic cash gifts, bequests, outstanding pledges, gifts in kind, and planned gift expectancies received by donors during the fiscal year period. Reports are pulled each quarter from Millennium to show progress towards goal.

Source of Evidence: Existing data

Target:

Bring in \$15,000,000 in Private Funds to the University.

Connected Document

[10-Year Summary of Fundraising](#)

Finding (2015-2016) - Target: Met

Total gifts and pledges for the year 2015-2016 equals \$15,010,874.57. This includes gifts and pledges from Alumni, Friends of the University, Corporations and Foundations and major investments through the silent phase of the Athletic Campaign.

M 6: Establish New Annual Giving Program

Establish a new Annual Giving Program, which will include a Fall Phonathon for the University Annual Fund, a Spring Phonathon for College/Unit solicitations, and two Direct Mail programs (Deans Circle & Annual Fund Appeal) to raise unrestricted support for units across campus. Annual Giving is the basis for all fundraising efforts,

helping to identify major gift donors for larger donations to the university.

Source of Evidence: Activity volume

Target:

Execute 2 Phonathons and 2 Direct Mail Campaigns

Finding (2015-2016) - Target: Met

Completed 2 Phonathons and 2 Direct Mail Campaigns - 1 each in Fall in Spring. Reports will be created to analyze results of each. Some results are listed below:

Phonathon Fall

Completed Calls – 13,001

Number of Contacts – 7,017

Donors – 1,704

Average Pledge or Gift - \$63.26

Phonathon Spring

Completed Calls – 12,063

Number of Contacts – 6,881

Donors – 1,882

Average Pledge or Gift - \$82.88

Executed a Direct Mail program for College and Deans Circle Mailing for 5 colleges

Related Action Plans (by Established cycle, then alpha):

Data Enhancements Required

Data enhancements are needed in order to grow the Annual Giving (and Major Gift) program. Development has started conversations with Advancement Services and the UL Lafayette Foundation to define and build out the data analytics and reporting required to build out this part of the Office of Development. Overall the purchase of a data reporting tool is needed to add on to Banner to make this improvement as well as staff training.

Established in Cycle: 2015-2016

Implementation Status: In-Progress

Priority: High

Relationships (Measure | Outcome/Objective):

Measure: Establish New Annual Giving Program |

Outcome/Objective: Fundraising Activity

Responsible Person/Group: Advancement Services, UL Lafayette Foundation, Development

Additional Resources: Additional staffing for record management, data

enhancement planning, data analytics and reporting may be needed.

Budget Amount Requested: \$40,000.00 (recurring)

O/O 4: Alumni Participation Rate

What was the number of undergraduate alumni donors for your institution? Alumni donors are alumni with undergraduate degrees from your institution who make one or more tax-deductible gifts from either themselves or their legal spouse/partner for either current operations or capital expenses during the specified fiscal year). Exclude all soft-credit only contributions – only report on IRS reportable gifts. This number is reported to US News and World Report to include in annual university rankings.

Related Measures

M 3: Alumni Participation Rate

Increase or Maintain Alumni Participation Rate each fiscal year. Donor data is tracked in Millennium each year as gifts come in. In June of every year, the Director of Institutional Research requests a report from the Advancement office to send in a report to US News and World report for the prior fiscal year. The Development Office also monitors this number annually using the same report from Millennium.

Source of Evidence: Existing data

Target:

Goal: 5500 alumni donors (overall increase or maintain number from prior year).

Finding (2015-2016) - Target: Met

Number of undergraduate alumni donors in 2015-2016: 8,545

I'd like to work to find out why there was such a major jump between FY15 and FY16. It may be due to the new Annual Giving program (phonathon, mail and email solicitations) as well as the new RCAF membership program role out requiring donations to purchase athletic tickets.

Analysis Questions and Analysis Answers

How were assessment results shared and evaluated within the unit?

Where we are to achieving annual goals in Development are shared in everyone month team meeting as well as every quarter at the UL Lafayette Foundation board meeting. On August 1, 2016, the Executive Director of Development shared final results with all Deans and Units heads in a meeting. University Advancement Team was provided the final results in the August 5, 2016 VP meeting.

Identify which action plans [created in prior cycle(s)] were implemented in this current cycle. For each of these implemented plans, were there any measurable or perceivable effects? How, if at all, did the findings appear to be affected by the implemented action plan?

There were no active action plans created in prior cycles to implement.

What has the unit learned from the current assessment cycle? What is working well, and what is working less well in achieving desired outcomes?

A major item we learned through the implementation of the new Annual Giving program and planning process for Major Gift Officer goals for FY17 is we need access to better data and reporting tools. We are having trouble with segmenting data for our annual

giving program and reporting on where the funds raised are going (i.e. to what units and how much?). We are also having a hard time identified new Major Gift prospects and having accurate contact information for new prospects. We need to improve in this area or our efforts to increase fundraising year over year will be hindered.