

2017-2018 Assessment Cycle VPUA_Development

Mission (due 12/4/17)

University Mission

The University of Louisiana at Lafayette offers an exceptional education informed by diverse worldviews grounded in tradition, heritage, and culture. We develop leaders and innovators who advance knowledge, cultivate aesthetic sensibility, and improve the human condition.

University Values

We strive to create a community of leaders and innovators in an environment that fosters a desire to advance and disseminate knowledge. We support the mission of the university by actualizing our core values of equity, integrity, intellectual curiosity, creativity, tradition, transparency, respect, collaboration, pluralism, and sustainability.

University Vision

We strive to be included in the top 25% of our peer institutions by 2020, improving our national and international status and recognition.

College / VP and Program / Department Mission

Mission of College or VP-area

Provide the mission for the College or VP-area in the space provided. If none is available, write "None Available in 2017-2018."

The University Advancement division supports the University of Louisiana at Lafayette by enhancing its image, keeping alumni involved, maintaining accurate information on alumni, donors, and friends of the University, raising necessary funds for professorships, scholarships and important programs, and encouraging a close relationship between the University and the community.

Mission of Program / Department

Provide the program / department mission in the space provided. The mission statement should concisely define the purpose, functions, and key constituents. If none is available, write "None Available in 2017-2018."

The Office of Development advances the mission of the University of Louisiana at Lafayette by facilitating private philanthropic support. From establishing scholarships to funding advancements in education and research, donors make a significant impact on our students, faculty, staff, and community.

Attachment (optional)

Upload any documents which support the program / department assessment process.

Assessment Plan (due 12/4/17)

Assessment Plan (Goals / Objectives, Assessment Measures and Criteria for Success)

Assessment List

Goal/Objective	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.(Imported)											
Legends	OO - Outcome/Objective (administrative units);											
Standards/Outcomes												
Assessment Measures	<table border="1"> <thead> <tr> <th>Assessment Measure</th> <th>Criterion</th> <th>Attachments</th> </tr> </thead> <tbody> <tr> <td>Direct - Activity Volume (Other)</td> <td>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/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 1,000 face-to-face meetings in FY17/18</td> <td></td> </tr> <tr> <td>Direct - Activity Volume (Other)</td> <td>Total number of proposals to donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship). Proposals will be tracked in Millennium/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 120 proposals in FY17/18</td> <td></td> </tr> </tbody> </table>			Assessment Measure	Criterion	Attachments	Direct - Activity Volume (Other)	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/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 1,000 face-to-face meetings in FY17/18		Direct - Activity Volume (Other)	Total number of proposals to donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship). Proposals will be tracked in Millennium/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 120 proposals in FY17/18	
	Assessment Measure	Criterion	Attachments									
	Direct - Activity Volume (Other)	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/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 1,000 face-to-face meetings in FY17/18										
	Direct - Activity Volume (Other)	Total number of proposals to donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship). Proposals will be tracked in Millennium/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 120 proposals in FY17/18										

Goal/Objective	Secure private funds (unrestricted and restricted) from alumni, friends, corporations and foundations that will assist the university, colleges and units in achieving their goals.(Imported)								
Legends	OO - Outcome/Objective (administrative units);								
Standards/Outcomes									
Assessment Measures	<table border="1"> <thead> <tr> <th>Assessment Measure</th> <th>Criterion</th> <th>Attachments</th> </tr> </thead> <tbody> <tr> <td>Direct - Existing Data (Other)</td> <td>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/Banner to show progress towards goal. Bring in \$25,000,000 in Private Funds to the University.</td> <td></td> </tr> </tbody> </table>			Assessment Measure	Criterion	Attachments	Direct - Existing Data (Other)	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/Banner to show progress towards goal. Bring in \$25,000,000 in Private Funds to the University.	
	Assessment Measure	Criterion	Attachments						
	Direct - Existing Data (Other)	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/Banner to show progress towards goal. Bring in \$25,000,000 in Private Funds to the University.							

Goal/Objective	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.(Imported)		
Legends	OO - Outcome/Objective (administrative units);		
Standards/Outcomes			
Assessment Measures			
	Assessment Measure	Criterion	Attachments
	Direct - Existing Data (Other)	Increase 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/Banner.	

Program / Department Assessment Narrative

The primary purpose of assessment is to use data to inform decisions and improve programs (student learning) and departments (operations); this is an on-going process of defining goals and expectations, collecting results, analyzing data, comparing current and past results and initiatives, and making decisions based on these reflections. In the space below, describe the program's or department's overall plan for improving student learning and/or operations (the "assessment plan"). Consider the following:

- 1) What strategies exist to assess the outcomes?
- 2) What does the program/department expect to achieve with the goals and objectives identified above?
- 3) How might prior or current initiatives (improvements) influence the anticipated outcomes this year?
- 4) What is the plan for using data to improve student learning and/or operations?
- 5) How will data be shared within the Program/Department (and, where appropriate, the College/VP-area)?

Assessment Process

- 1) Development is working with Advancement Services in hopes of creating reporting tools that will help us both make more informed business decisions and assess outcomes. Today, no reporting exists of this nature.
- 2) Increased private philanthropic revenue to fund university priorities.
- 3) New Annual Giving initiatives (phonathon, direct mail, email, etc.) last year and this year should help improve the the number of alumni giving back to the institution. Data management and analyses play a major role in these efforts, which has been a challenge for Development in FY17 and FY18 to date.
- 4) Data is a major challenge for the Office of Development. Current fiscal year as well as future fiscal year fundraising success is highly dependent on cleaning old data, acquiring new data, and performing sophisticated data analyses to make informed business decisions. Without improvements in data, Development will not be able improve fundraising or meet stated goals. Data related operations are housed under a separate department from Development. Advancement Services is responsible for data management under the VP for Advancement.
- 5) After Advancement Services cleans the data, reports can be created and distributed on a daily, weekly or monthly schedule to Development employees ans well as Leadership. We hope that by the start of FY19 that can be

accomplished.

Results & Improvements (due 9/15/18)

Assessment List Findings for the Assessment Measure level for 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.(Imported)

Goal/Objective	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.(Imported)				
Legends	OO - Outcome/Objective (administrative units);				
Standards/Outcomes					
Assessment Measures	Assessment Measure		Criterion		
	Direct - Activity Volume (Other)	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/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 1,000 face-to-face meetings in FY17/18			
	Direct - Activity Volume (Other)	Total number of proposals to donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship). Proposals will be tracked in Millennium/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 120 proposals in FY17/18			
Assessment Findings	Assessment Measure	Criterion	Summary	Attachments of the Assessments	Improvement Narratives
	Direct - Activity Volume (Other)	Has the criterion 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/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 1,000 face-to-face meetings in FY17/18 been met yet?			
	Direct - Activity Volume (Other)	Has the criterion Total number of proposals to donors/prospects as they relate to the donor cultivation cycle (Prospect Identification, Cultivation, Solicitation, or Stewardship). Proposals will be tracked in Millennium/Banner by the development officer. Reports are pulled by the Executive Director of Development on a monthly bases to show activity towards goal. 120 proposals in FY17/18 been met yet?			

Assessment List Findings for the Assessment Measure level for Secure private funds (unrestricted and restricted) from alumni, friends, corporations and foundations that will assist the university, colleges and units in achieving their goals.(Imported)

Goal/Objective	Secure private funds (unrestricted and restricted) from alumni, friends, corporations and foundations that will assist the university, colleges and units in achieving their goals.(Imported)	
Legends	OO - Outcome/Objective (administrative units);	
Standards/Outcomes		
Assessment Measures	Assessment Measure	Criterion
	Direct - Existing Data (Other)	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/Banner to show progress towards goal. Bring in \$25,000,000 in Private Funds to the University.

Assessment Findings					
	Assessment Measure	Criterion	Summary	Attachments of the Assessments	Improvement Narratives
	Direct - Existing Data (Other)	Has the criterion 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/Banner to show progress towards goal. Bring in \$25,000,000 in Private Funds to the University. been met yet?			

Assessment List Findings for the Assessment Measure level for 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.(Imported)

Goal/Objective	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.(Imported)	
Legends	OO - Outcome/Objective (administrative units);	
Standards/Outcomes		
Assessment Measures		
	Assessment Measure	Criterion
	Direct - Existing Data (Other)	Increase 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/Banner.

Assessment Findings					
	Assessment Measure	Criterion	Summary	Attachments of the Assessments	Improvement Narratives
	Direct - Existing Data (Other)	Has the criterion Increase 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/Banner. been met yet?			

Reflection (Due 9/15/18)