

Emerging Trends: Fresh Approaches to Address Common Challenges

**Annual Member Meeting
Development Learning Collaborative**

June 12, 2012

Agenda

- **Northeastern University: *Catalyst Project***
 - Joseph J. Donnelly, Jr. Vice President & Campaign Director
 - Erin Martinovich, Director, Northeastern Fund
 - Valerie Paquette, Office of Alumni Relations
- **University of Oregon: *Prospect Identification Pool***
 - Paul Elstone, Assistant Vice President, Schools and College Development
- **Auburn University: *Data Driven Gift Officer Goals***
 - Karen McCauley, Interim Associate Vice President for Central Development and Operations
- **Texas A&M Foundation: *Leveraging Strategic Planning for Accelerated Campaign Priority Setting***
 - James J. Palincsar, Senior Vice President for Development
- **Relevant Eduventures Resources**

Catalyst Project:

Improving young alumni giving opportunities through innovative funding priorities generated and championed by current students



Northeastern



Catalyst

Northeastern is full of passionate and entrepreneurial students making an impact on the university community and beyond. Our innovative Catalyst program is a new opportunity for you to invest in specific student projects that are both inspirational and transformative.

Explore our website today to discover projects that need your support. **northeastern.edu/catalyst**




The Northeastern Fund

Be the Difference


About

- Applies an online crowdfunding model to the Northeastern Fund operations.
- Donors contribute gifts directly to student organizations and academic programs on a project based level.
- Aims to engage young alumni with social and innovative priorities, reach new segments, and educate students about philanthropy.



The Northeastern Fund
Be the Difference
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Browse Projects
Browse through projects on the Catalyst website to see the broad range of exciting work being done by Northeastern students.

Make a Gift
Choose your favorites and click on the "Support" button to make your gift. Gifts can be made in any amount starting at \$1.

See Results
Check back often to see your dollars in action. Updates on all funded projects will be posted on the project page.


Current Projects
Below is a listing of all our currently fundable Catalyst projects. Browse through and find the project that means the most to you, click on the title or image for more information or simply select the "Support" button to make your gift immediately.



South Africa Field Study Trip | *Social Enterprise Institute*
Help us fundraise for our service projects with Nonceba, Niall Mellon, Red Cross, and Harvest for Hope.

99.00% funded
\$25 remaining
31 days left

Support



Village Technology & Entrepreneurship Center | *Youth Action Africa*
Help us empower a rural African village with access to computers, information and a fertile environment to start and grow businesses.

18.82% funded
\$2760 remaining
27 days left

Support

Don't See a Project You Like?
We're always taking in new applications from student groups and organizations all over campus, so be sure to check back often for new opportunities.
If you would like to be notified when new projects are posted, follow us on Twitter (@heyJackNU) or like us on Facebook.

About

- Student project applications are reviewed by members of the Alumni Relations and the Northeastern Fund team.
- Selected groups are provided with a multimedia online platform to raise funds towards their project goal.
- Students are ultimately responsible for promoting their own project and driving donors to their site.
- Gifts to campaigns that do not reach their goal in the allotted time are directed to a general Catalyst fund.



TIPS FOR A SUCCESSFUL FUNDRAISER

1. Tell Your Story

Alumni donors will respond to your passion along with the ability to relate to your Northeastern experience. When compiling your web profile try to answer the following questions: What is unique about your project? What impact will it have on Northeastern, the greater community, or the world? How is it innovative? How does this personally enhance your Northeastern experience?

2. Be Creative

Sell your ideas to prospective donors through engaging video and photos. The sky is the limit with your video pitch. However, it does not necessarily need to involve complicated editing or spectacular footage – just honest and convincing testimony about your organization, why your project is important, and how prospective donors can help. The goal is to provide donors with a personal connection to you so let your personality and passion shine! Your efforts will also provide users with an enjoyable online experience, resulting in more visits and more donations.

3. Set Obtainable Goals

We want to guarantee that the money contributed will result in a successful project so this program is based on an all-or-nothing funding model. Set a reasonable budget that will provide enough money to fund your project but do not overreach. If you exceed your goal, your group will retain all the funds earned to enhance your current project or apply to future projects. Larger or ongoing projects can be funded in stages so don't hesitate to ask us for help in determining a reasonable goal.

4. Self-Promote

It's up to you to build momentum for your project. We'll do our part to spread the word to the alumni community but in order to be successful you must utilize your own networks to drive prospective donors to your project site. You can reach out to past members of your organization, pass out flyers on campus, and utilize social networking tools. Be sure to have a plan in place to spread the word to your family, professional contacts, and former and current classmates.

5. Timely Updates and Sincere Acknowledgements

The sustainability of the platform and the success of future student projects rely on your commitment to the program. When your project is funded your group will provide us with a sincere thank you note that will be sent on your behalf to the donors. About a month after completing your fundraiser, you'll begin to send us monthly updates on your process which will be posted to the site, culminating in your completed project. We recommend that your completed project update includes either photos or video. Timely delivery of these pieces is of the utmost importance because if donors can see the direct impact of their gifts they are more likely to give again.

6. Think About Incentives

Do you have any ideas for additional ways to incentivize or acknowledge your donors? Perhaps you could offer an invite to your next networking event or an organization T-shirt for a larger donation. This portion is optional but could result in an even more successful fundraiser.

CONTACT

For questions about the program or application please contact: Valerie Paquette, x7290, v.paquette@neu.edu






Results

Since launch in mid-March:

- 9 projects have been accepted
- 6 projects have been fully funded
- 2 projects are in progress
- 1 project has failed to hit goal

Total Donors: 132


Total Funds Raised: \$16,663

	<p><u>Water For El Carrizalito</u> <i>Engineers Without Borders</i></p> <p>EWB-NEU believes clean and accessible water is a basic human right for all. We seek your support to help us provide water to El Carrizalito, Honduras.</p> <p>100.00% funded \$0 remaining</p> <p>Funded</p>
	<p><u>Dominican Republic Field Study Service Learning</u> <i>Social Enterprise Institute</i></p> <p>Help us implement our service projects with Esperanza, Heifer International, and the Nuestras Pequeñas Hermanas orphanage in the Dominican Republic.</p> <p>100.00% funded \$0 remaining</p> <p>Funded</p>
	<p><u>NU BAJA Goes to Oregon</u> <i>NU BAJA</i></p> <p>Help Northeastern Baja put their student designed and fabricated custom car to the test against other colleges in offroad competition in Oregon.</p> <p>100.00% funded \$0 remaining</p> <p>Funded</p>
	<p><u>Net Impact Forum for Student Social Innovation</u> <i>Net Impact</i></p> <p>Support next generation of social entrepreneurs! Give to the Net Impact Forum for Student Social Innovation, Nov. 17, 2012 at the Microsoft NERC Center.</p> <p>100.00% funded \$0 remaining</p> <p>Funded</p>
	<p><u>Water For Ebunda</u> <i>Engineers Without Borders</i></p> <p>EWB-NEU believes clean and accessible water is a basic human right for all. We seek your support to help us provide water to Ebunda, Uganda.</p> <p>100.00% funded \$0 remaining</p> <p>Funded</p>

Next Steps

- Introduce project updates to ensure accountability to donors and drive repeat traffic
- Explore different sized projects beyond the typical project limits
- Explore how projects could be used as part of a direct appeal campaign to certain segments
- Promote student/alumni connections through Catalyst showcase events
- Attract a larger pool of applicants through fall campus promotions

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NUBAJA Goes to Oregon!

Students take engineering experience

100.00% funded
\$0 remaining

Funded

Follow Us

Northeastern BajaSAE
NUBaja

NUBaja Made it to Wisconsin alright. Weather is looking to be a lot nicer this time than the last race!
17 hours ago · reply · retweet · favorite

NUBaja Next stop Wisconsin!
yesterday · reply · retweet · favorite

NUBaja One week until we leave for the last race of the year! Hoping to finish strong!
6 days ago · reply · retweet · favorite

NUBaja Looks like we have 70 points to make up in Wisconsin!
fb.me/1YzTRDZuy
10 days ago · reply · retweet · favorite

NUBaja I posted 135 photos on Facebook in the album "BAJA SAE Oregon 2012" fb.me/1OfqRzAMG

Join the conversation

For updates on the team's progress, like us on Facebook:

NU Motorsports
Like 196

UPDATE: Our team just finished a competition in Auburn, Alabama and took home 2nd place in the endurance race and 4th overall out of a total of 100 teams! We are very excited for our upcoming competition in Oregon, but we need your help to get there. Please support our project today!

Each year Northeastern Baja SAE designs, builds, and races a prototype all-terrain vehicle to compete in international competitions. The competitions are intended to simulate the real-world engineering, design, marketing, and business challenges of bringing a vehicle to mass market. Our team is entirely student run from the design calculations to team management and gives students the opportunity to gain quality hands-on engineering experience. This experience has helped members gain valuable experience to be better prepared for the professional world.

After placing in the top 30% at all competitions last year, including a 3rd place finish in land maneuverability, we are returning in 2012 with improved suspension and steering designs to compete for a better finish. We will be participating in all three North American competitions including one near Portland, Oregon. Please help us raise the travel money required to compete in the Oregon competition.

Our Goal

Our goal is to raise \$2500 to pay for gas and travel expenses to transport for our team of 8 students and this year's all-terrain vehicle 3000 miles across the country. Without your support we will be unable to showcase our work and represent Northeastern in the Oregon competition. Thank you!

Thank You for Your Support!



Catalyst

Questions?

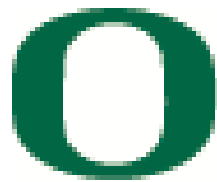


The Northeastern Fund

Be the Difference

Dynamic Prospect Management:

Flexible referral system that reduces bureaucracy and territorial behavior for improved identification and qualification of new prospects

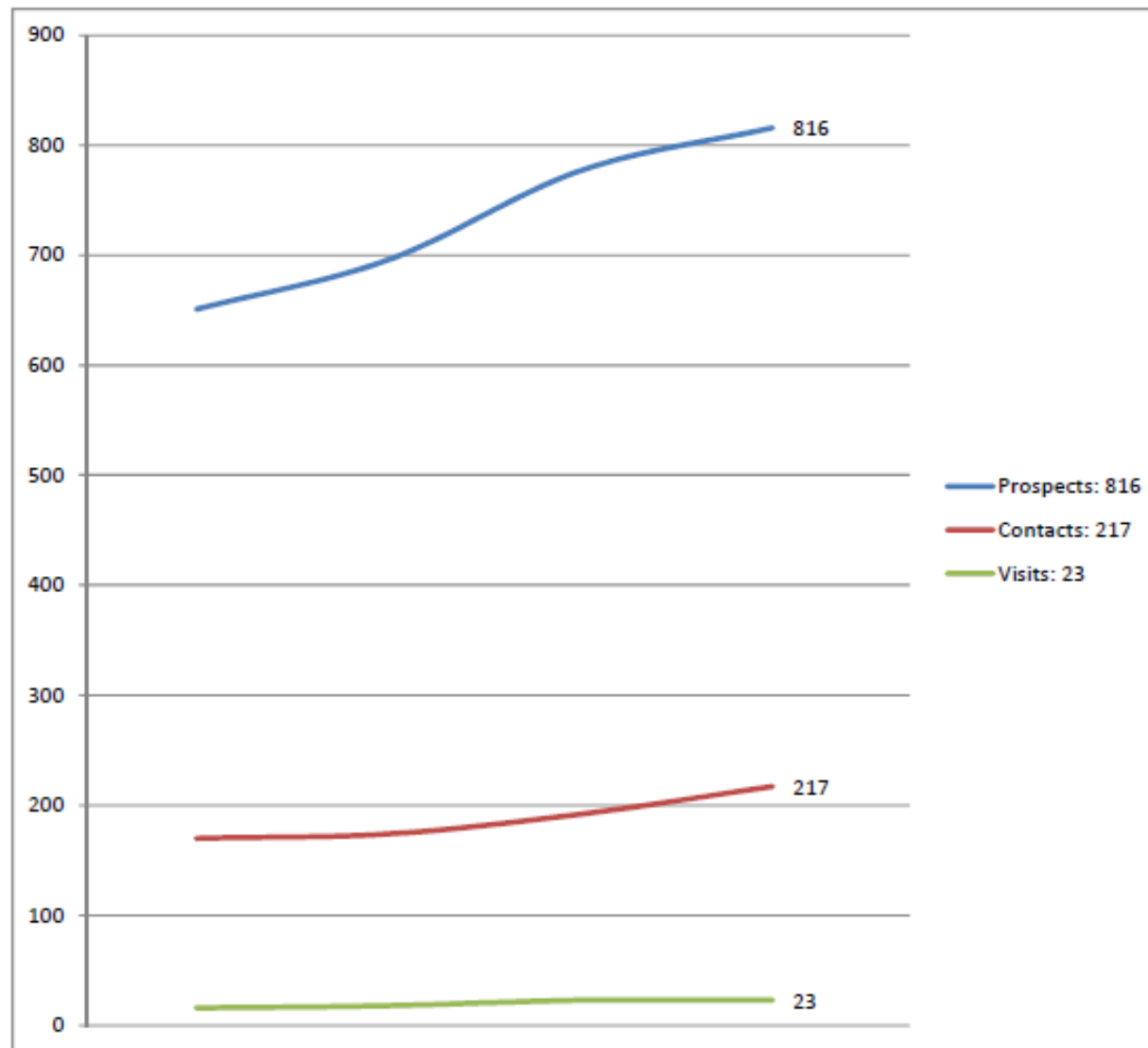


UNIVERSITY OF OREGON

Background

- Development officers' portfolios were becoming stagnate and potentially valuable prospects weren't being contacted or visited
- Need to build pipeline for upcoming campaign
- Increased research activity to identify new prospects
- Needed a less territorial way to work with prospects that matched a donor's variety of interest beyond one particular unit
- Hired 15 new development officers

Driving Activity to Revitalize the Pipeline



Prospect Referral (Task)

Barbara [REDACTED] (Prospect#)
 Prospect Type Major Gift (Major Prospect)

Task	New Prospect		
Status	Open	Scheduled	May 14, 2012
Priority		Completed	
		Original	
Description	This prospect was identified through the March 2012 <u>WealthEngine</u> screening. Her home is valued at \$1.6M, plus she owns property in [REDACTED], OR. Her husband (<u>dec'd</u> 2009) was a UO grad dentist, real estate developer, and founder of [REDACTED]. She's a College of Education grad who has donated exclusively to UO Libraries since 2003, and may be of interest to Lisa Manotti, Kelly Menachemson, and Kat Walsch.		
Responsible			
Assignment	Office		
Contact Rpt			
	<input type="checkbox"/> Strategy	Recur Month	
Frequency		Recur Week	
Purpose		Recur Day	
Source	Ms. Anne F. McGinley #655779		
Unit	Library		

Monthly Referral Report

Prospect Name	Entity ID	Task Type	Date	Description	Contacted after Assignment by	Evaluations	Type	City	State	Degree
New/Qualified Discovery Prospects Date Range: 02/01/2012 - 02/01/2012 Task: NP Unit:										
Charles D. & Deborah	000	New Prospect	02/01/2012	Prospect identified via WE electronic screening, 10/2011. Referred to Karen Shaw (Student Affairs) for daughter's activity. Money with ties to Hawaii. See additional info in Research Reports. PULD thinks may be closer to \$500K splits w/ prospect's family members.		\$1,000,000 - \$1,999,999	WE Validated - Prospect		CA	
Christophe	000	New Prospect	02/01/2012	This prospect was identified through the March 2012 WealthEngine screening. He owns _____ with a combined value of \$3.8 million. His businesses are involved in _____ technology. A northern Californian who supports the parents fund and library, he may be of interest to Karen Shaw, Student Affairs; Lisa Manotti, Libraries; and Kat Walsch, Regional DO.	Ms. Lisa A. Manotti - Contacted for Appointment	\$1,000,000 - \$1,999,999	WE Validated - Prospect		CA	

Description

This prospect was identified through the March 2012 WealthEngine screening. He owns _____ with a combined value of \$3.8 million. His businesses are involved in _____ technology. A northern Californian who support the parents fund and library, he may be of interest to Karen Shaw, Student Affairs; Lisa Manotti, Libraries; and Kat Walsch, Regional DO.

Contacted after Assignment by

Ms. Lisa A. Manotti – Contacted for Appointment

Evaluations

\$1,000,000 - \$1,999,999

Next Steps

- Increase visit activity with newly identified prospects
- Determine how to utilize the new process for campaign success
- Continue to refine the referral process to make sure the right prospects are being seen

Interactive Goal Setting Tool:

Interactive tool combining national and institutional performance data to generate individualized gift officer goals for increased accountability



AUBURN
UNIVERSITY

Background

- Auburn continues to make strides in professionalizing fundraising operations with a focus in the coming year on increased gift officer productivity
- Staff have varying responsibilities and support many different units of the institution with vastly different prospect pools
- To generate buy-in from gift officers it is important that goals be data driven; based on a combination of industry norms and adjusted for specific elements of fundraising at Auburn
- Partnered with Eduventures to create an interactive tool that unlocks national gift officer benchmarks

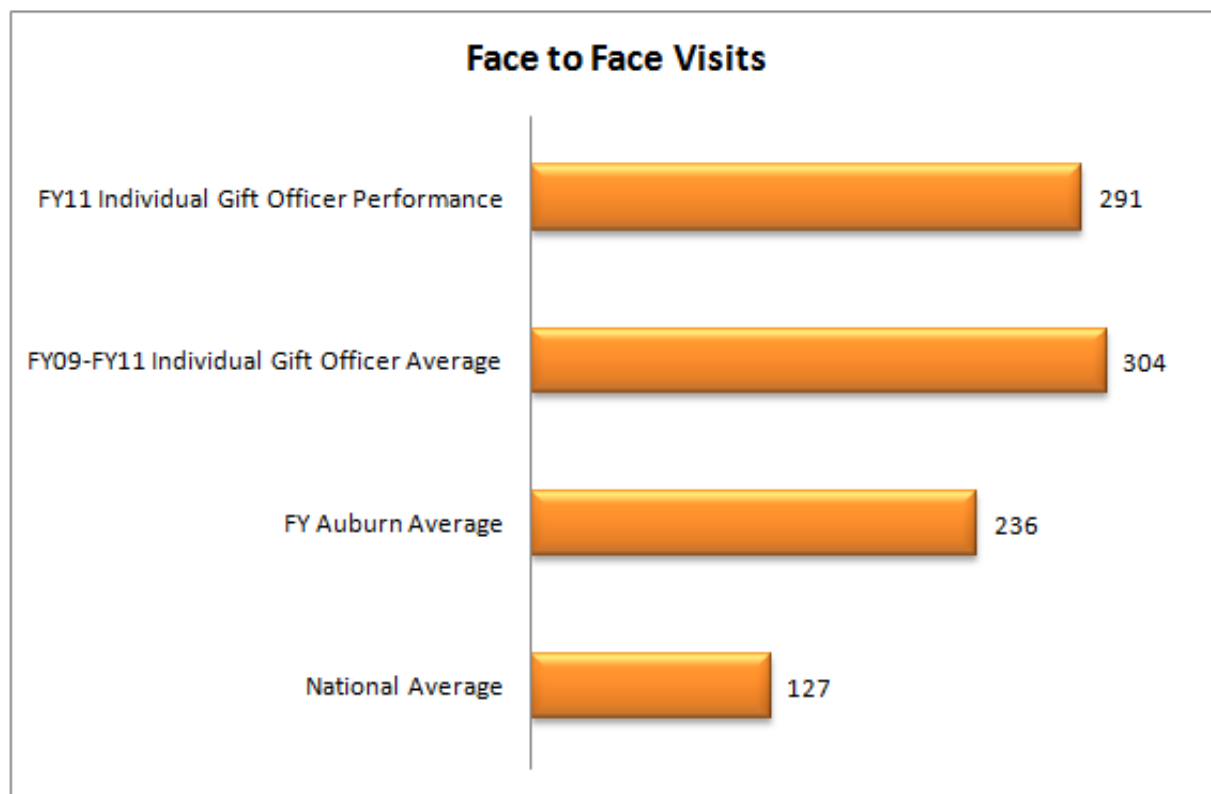
Goal Setting Data Inputs

Past Productivity	FY11 Ind. Results	FY10 Ind. Results	FY09 Ind. Results	Individual 3-Year Average	FY11 Inst. Average Overall	% Individual Is Ahead/ Behind Inst. Overall Average	Nat. Avg	% Individual Is Ahead/ Behind Nat. Avg
Face to Face Visits Goal	240	240	240	240	235	2%	154	56%
Face to Face Visits Actual	291	334	287	304	236	23%	127	129%
Percent of Visit Goal Achieved	121%	139%	120%	127%	100%		82%	
Number of Prospects Visited	116	133	94	114	80		66	

Prospect Rating and Stage Considerations

	Qualification	Active Cultivation or Solicitation	Stewardship	Predicted to Close by End of FY	Planned Solicitation Value
Not Rated	39				
\$25K or Less		20	50	7	\$175,000
\$25K-\$99K		10	24	3	\$300,000
\$100K-\$1M		10	20	4	\$4,000,000
\$1M+		4	4	2	\$2,000,000
Total	39	44	98	16	\$6,475,000

Graphs and Discussion Questions for Key Metrics



Percent Gift Officer Is Ahead/Behind Auburn Overall Average

23%

Percent Gift Officer Is Ahead/Behind National Average

129%

Discussion Questions

Consider the answers to these questions and the "Visit Planning Worksheet" to determine face to face visit goals.

- Is the gift officer above/below/on target? What led to this in FY11?
- Are there other characteristics that would influence the gift officer being above/below Auburn's or the national average?

FYXX Face to Face Visit Goal: _____

Gift Officer Activity Planning

	Total Prospects	x Visits Per Prospect	x Goal of Percentage Visited	= Number of Visits	Number of Prospects Visited	Percent Unique Visits
Qualification	39	1	50%	20	20	100%
Cultivation (no solicitation expected this year)	28	1.5	75%	32	21	67%
Cultivation (solicitation planned this year)	16	2.5	100%	40	16	40%
Stewardship	98	1	50%	49	49	100%
TOTAL	181	--	--	140	106	75%

Next Steps

- Roll out the new goal-setting process to managers and gift officers
- Make adjustments to the tool based on feedback after initial launch
- Continue to collect performance data and assess which metrics drive productivity at Auburn

Accelerated Campaign Priority Setting:

Leveraging institutional strategic plans and key stakeholders to develop inspiring donor-centric campaign themes in one day



SPIRIT AND MIND®

Background

- Preparing to launch the University's third comprehensive campaign
- Need to move away from a laundry list of funding projects and move to a donor-centric model focused on themes and areas of excellence
- Need to focus on aspirations rather than needs
- University has gone through a series of strategic planning processes over the past decade



Vision 2020

[Vision 2020 Mid-Term Review Report](#)

[The Twelve Imperatives](#)

[Visioning Process Reports](#)

[In Pursuit of the Vision](#)

[Academic Master Plan](#)

[Advisory Council](#)

[College and Division
Five-Year Plans](#)

[Peer Institutions](#)

[Related Links](#)

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The Twelve Imperatives

The process of Vision 2020 produced hundreds of ideas supporting our goal. Almost all of these suggestions have merit, and most earn acknowledgment in the body of this report. The precepts, focused goals, and measures can be summarized in twelve overarching ideas. We call these the twelve imperatives.

(from the Vision 2020: Creating a Culture of Excellence Report)



1. Elevate Our Faculty and Their Teaching, Research, and Scholarship

The world today is knowledge-based and constantly changing. In such a world, the quality research university is "a creator, organizer, preserver, transmitter, and applier of knowledge." The foundation of these functions is an excellent faculty in adequate numbers. We need to increase substantially the size of our faculty (perhaps by half), and we must attract and retain many more top scholars, teachers, and researchers. We will have to review and strengthen hiring and tenure policies, enhance compensation, focus our scholarship, and transform our administrative culture. We cannot achieve our goal without a nationally recognized faculty with a passion for teaching and an academic environment that values and rewards innovation, great ideas, and the search for the truth.

2. Strengthen Our Graduate Programs

We must have a shift in our thinking about the role of graduate education to attain the level of excellence we desire. A substantially expanded graduate studies effort is critical to our academic aspirations and to our effectiveness as a great research university. Outstanding professors attract superior graduate students and, in many instances, the money to help support their research. But these professors by themselves will not be enough. We must create a dynamic, exciting, discovery-driven intellectual environment that will draw superior graduate students, comparable to those in the nation's best graduate programs.

3. Enhance the Undergraduate Academic Experience

The core of Texas A&M University must be a residential, learner-centered community that attracts excellent students and provides quality learning and mentoring experiences. We must better prepare learners for lives of discovery, innovation, leadership, and citizenship by better inculcation of writing, thinking, and self-expression skills. Texas A&M University is proud of its history of

Campaign Priorities Think Tank

- Think tank model launched in early 2012 securing participants and date for all-day workshop on theme development
- President, Provost, 3 Deans, 2 University/Academic Leaders, and 3 Alumni Leaders serving as members of the think tank
- One all-day planning session held end of March 2012 with a trained facilitator and VP level note takers
- Prior to the one-day session, members reviewed the extensive reporting that had been created from past university strategic planning initiatives

Theme Development Workshop Agenda

- Welcome and Introductions
- Campaign Planning Process
- Academic Planning Process
- National Perspective/Themes
- Concepts of Themes
- Theme Development
- Wrap up/Action Item Review

Timeline

- Recruit workshop attendees in **February**
- Conduct workshop on theme development in **March**
- Draft 5 to 6 campaign themes **April/May/June**
- Prepare a discussion draft for the Deans to help move the University closer to establishing campaign themes
- Seek feedback from Deans in **June/July**
- Begin testing themes with a larger audience in **August**
- Begin promoting themes and prepare to launch campaign silent phase in **January 2013**

EDUVENTURES RESOURCES

Relevant Resources Available to Members

- [Aligning Fundraising Efforts for a New Generation of Donors: Research Brief](#)
- [Sharpening Prospect Research Metrics and Understanding ROI](#)
- [A Guide to Setting Gift Officer Goals for Managers](#)
- [Generating Big Ideas](#)
- [Testing Feasibility While Deepening Donor Relationships](#)



EDUVENTURES

For more information about this session, please contact:

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