PROJECT OPTION – UNIVERSITY OF HARD-KNOCKS FUND RAISING DRIVE

Overview

The Development Office of the University of Hard-Knocks seeks to obtain donations for its Fund Raising Drive from donors that include graduating seniors, alumni, parents, faculty, administrators, staff, corporations and friends of the university. The fund collects over $2 million annually. The Fund Raising Driver Director wants to create a database to help with raising of funds and tracking the donations.

Basic Operations

1. Funds are raised during each academic year which extends from September 1 to August 31. Each fall, all potential donors (approximately 50,000) to the Fund Raising Drive receive a personalized letter from the Director. The letter includes a reply envelope and form on which the donor can fill in the amount s/he is pledging to contribute for the year and the method of payment. Payment can be sent as a single check in the envelope. A donor can choose deferred payments over a period of a year, or s/he can provide a credit card number to pay in a single lump sum. Often, the employer of the donor (or the donor's spouse) has a program to match the gift to the university and the donor provides the contact information on the envelope. As soon as the pledge is received, an acknowledgement letter is sent thanking the donor. The Director is responsible for following up with the employer to collect the matching gift, which is paid in a single lump sum by the corporation.

2. Several fundraising events are held during the year – fall gala, holiday dinner dance, spring auction, etc.

3. Each class year has a class coordinator who contacts members of his/her graduating class. The class coordinator sends an additional letter to ask for larger donations from reunion classes, those who are marking an important graduation anniversary – 5 years, 10 years, etc – before the reunion celebration weekend.

4. Each spring there is a phonothon during which current students and volunteers call other potential donors to solicit pledges. All alumni who have not contributed by the end of May receive calls from their class coordinator requesting them for a donation. If the class coordinator to make this contact, the Director or a volunteer makes the phone contact instead.

5. The donations are categorized by (1) group they are from, (2) by the class year of the donor (if applicable) and (3) by size. There are five donor circles categorized by the amount of the gift – President's Circle for gifts over $50,000; Platinum Circle for gifts over $25,000, etc. Gifts of $100 or less are not listed as belonging to a circle. An annual report listing all donors by category, year and donor circle is published and mailed to all actual and potential donors during the summer. The report does not list the actual amount contributed by each donor.

Information Needs

Currently, the Director has a mailing list on a word processor that is used to generate labels and letters to potential donors. The Director would like to be able to personalize each letter by adding a line about the amount of money the donor contributed the previous year. A spreadsheet is used to keep track of pledges and donations. Large pledges from individual donors are ordinarily paid in monthly installments rather than in one payment, but currently there is no way to keep track of these payments. When a database is developed, the Director would like to be able to send reminders if payments are over a month overdue.

An Annual Fund Raising Gift Form is sent with all letters soliciting funds, with blanks for the donor to fill in the applicable information, as follows:

Donor Name, Donor Address, Category (check list indicating senior, alumnus/alumna, parent, administrator, etc.), Graduation Year, Date of Pledge/Gift, Amount Pledged, Amount Enclosed, Payment Method, Number of Payments Chosen, Credit Card Number, Matching Corporation Name, Matching Corporation Address, Name of Spouse (if matching gift is from the spouse's employer).

When pledges are received by class representatives or during the phonothon, the same information is collected on similar forms.

There are six reports needed.

1. ***Annual Report to Donors*** – this report was described in paragraph 5 of the Basic Operations section above. It lists names only, not amounts. The names have to be categorized as indicated. The report also has summaries, including the total amount raised from all sources, the total for each class, the percent participation for each class, the total for each category, the grand total for each donor circle, and the class total for each donor circle. It is an important fundraising tool for the following year's drive, since it is mailed to each potential donor.
2. ***Monthly Report*** – an internal report that the Director uses to evaluate the progress of the fundraising for the year to date. It gives the totals and percentages of the pledges and gifts received for the current month in all categories.
3. ***Payments Due Report*** – monthly report listing the pledge payments that were due that month but were not received. It would list the donor's name and address, the amount due, the date due, the amount of the pledge, the amount received so far, and the date of the previous payment, if any.
4. ***Event Report*** – report showing who attends each of the fundraising events, and what pledges and gifts were received from the attendees.
5. ***Class Representative Contact List*** – list of classmates to be contacted – name, address, landline telephone number, cell phone number, last year's donation information, and this year's donation information. This is given to each class representative.
6. ***Phonothon Volunteer Contact List*** – each volunteer caller is given a list with information (name, landline telephone number, cell phone numberm, address, category, year (if applicable), and last year's donation information) about potential donors to call.