ADVANCEMENT
BUDGET
PRESENTATION
For Budget & Resource Committee

April 9, 2015
Mike Andriatch, VP for Advancement & President of the Brockport Foundation
Updated totals …

- Comprehensive Campaign was at $21,848,457 as of 6/30/2014
- As of March 31, Campaign is at $25,621,773
- Campaign notes:
  - Gifts, pledges and bequests of $3,773,316 with 4th Qtr remaining
  - 17,388 total Campaign gifts (including pledges and bequests)
  - 11% alumni participation rate (over course of Campaign)
  - $1,318.93 average alumni gift (over course of Campaign)
  - 34% F/S giving rate
  - $1,473.53 average overall gift (including pledges and planned)
## Campaign Progress

as of March 31, 2015

<table>
<thead>
<tr>
<th>Constituency</th>
<th>Bequests</th>
<th>Pledges</th>
<th>Gifts</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>$6,231,919</td>
<td>$1,019,484</td>
<td>$3,996,492</td>
<td>$11,247,894</td>
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<tr>
<td>Emeriti/Retirees</td>
<td>$3,915,000</td>
<td>$80,292</td>
<td>$1,075,284</td>
<td>$5,070,576</td>
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<tr>
<td>Faculty/Staff</td>
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<td>Parents</td>
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<td>$160,251</td>
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<td>Students</td>
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<td>$365,722</td>
<td>$365,722</td>
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<td>Friends</td>
<td>$289,836</td>
<td>$188,784</td>
<td>$805,578</td>
<td>$1,284,198</td>
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<td>Foundations</td>
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<td>$89,000</td>
<td>$738,956</td>
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<td>Corporations</td>
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<td>$41,750</td>
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<tr>
<td>Other</td>
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<td>Totals</td>
<td>$10,877,756</td>
<td>$1,552,449</td>
<td>$13,191,568</td>
<td>$25,621,773</td>
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</tbody>
</table>
1. 2015-16 Priorities as they relate to …

- Advancement & the Strategic Plan
  - Successfully complete Comprehensive Campaign and its concluding report
  - Improve data retention and acquisition
  - Improve scholarship office operation
  - Enhance foundational efforts in communications, annual fund and leadership ($500-$4,999) giving
  - Enhance alumni relationships through programming, events and communications
1. 2015-16 Priorities as they relate to …

- Areas of Strategic Investment (1 of 3)
  - On-line only *Kaleidoscope*
  - Annual fund/phonathon opportunity
  - Increase sponsorship dollars for everything between minor events (small alumni functions) and major dinners (Benefactors and Scholars)
  - Move from Reunion AND Homecoming model to:
    - 50-year Reunion program at Commencement
    - Summer Reunion for a major group (’70s, OSAD, etc.)
    - Homecoming for all reunion classes, affinity groups, etc.
1. 2015-16 Priorities as they relate to …

• Areas of Strategic Investment (2 of 3)
  – Post-campaign fund-raising initiatives:
    • Continue to “invest” and engage in students and GOLD
    • Look at School-based priorities for moving forward
    • Increase unrestricted income!
    • Solicit recipients of Extraordinary Scholarships from 1997 through 2010
    • Use better data to reach parents of current students
    • One “Day of Giving” per year (spring 2016)
1. 2015-16 Priorities as they relate to …

- Areas of Strategic Investment (3 of 3)
  - Post-campaign fund-raising initiatives:
    - One “crowdfunding” initiative per year
    - More emeriti solicitations
    - Build strong stewardship program (to thank Campaign donors)
    - Major focus on planned giving through Hartwell Society
    - Test case (in 2016-17?) with school-based development officer
1. 2015-16 Priorities as they relate to …

• Assessment
  – Currently in research mode to determine school priorities
  – Complete Campaign report (end of Sept. 2015)
  – Another clean audit
  – Stewardship reports out in Oct. 2015
  – Data retention and acquisition
  – Scholarship Office processes and communication
2. Use of Resources

- Faculty & Staff FTE:
  - Pre-Campaign (back to 2009-10): 20.0
  - Dec. 31, 2014: 22.5 (pre-R. Johnston retirement)
  - Current level: 21.0 in all of Advancement
    - Recently lost Annual Fund Coordinator to get to 21.0
    - Lose Major Gift Officer (MGO) in June and will not replace
    - Will not be replacing AVP position
    - Former VP currently working part-time through July 2015
    - One additional frozen position (MGO)
2. Use of Resources

- Faculty & Staff FTE:
  - Future needs
    - Add Scholarship Coordinator (requested; $40-50K)
    - Keep former VP in PT role through Dec. 31, 2015 (~$54K)
    - Add MGO (frozen line) in 2016-17 (split between Advancement and Academic Affairs) to be housed in School of Business Administration & Economics (SOBAE), reporting to VP of Advancement and Dean of SOBAE ($60-80K)
    - Add MGO in 2017-18 ($60-80K)
2. Use of Resources

- Use of Priority Needs Funds
  - Permanent
  - None
2. Use of Resources

- Use of Priority Needs Funds
  - Temporary
    - Development Writer at $50K; contract through June 2016; need to move to permanent line; manages entire *Kaleidoscope* process as well as all other writing for Division
    - Annual Fund Coordinator at $39K; transfer money from OTPS to contract to hire outside firm to manage phonathon for 2015-16; includes data acquisition; our students remain as callers
    - $18K for phone system; no longer requested
    - $30K for Campaign consultant; scheduled for one more year; requesting only $7,500
2. Use of Resources

- **State Balance Rollover**
  - 2010-11 \( \$617,096 \) *
  - 2011-12 \$510,289
  - 2012-13 \$339,605 #
  - 2013-14 \$87,323
  - **2014-15** \$81,307

* Includes institutional investment in Campaign

# Campaign kickoff year: On- and off-campus launch events, Campaign video, website, additional travel, case statements
2. Use of Resources

- Division/Area re-deployment of existing resources
  - Similar to Fall report
    - Move Development Writer to permanent line (critical communication need)
    - One year contract for phonathon operation
    - Scholarship Office changes
    - Move printed docs to on-line ($70K in savings)
    - One less Foundation Board meeting off-site
    - Combined Foundation/Alumni Association Board meeting
2. Use of Resources

- Investment Priorities (submitted to Budget Office)
  - Scholarship Position
    - Major need for institution: communication, donor and departmental stewardship
    - While improved, current model hurting our research and data retention and acquisition (backlog; staff pulled from those roles)
    - Need two full-time people on data (on-line gifts, major data requests and reports, iModules management, moves management, dashboards, among many others)
    - If approved … Put new position within Advancement Services; allow current staff to move back to previous role
2. Use of Resources

- Expansion of Existing Activities
  - More alumni engagement activities (funded by sponsorships)
  - Focused major gift prospect pools (necessitated by much smaller staff)
  - Significantly improved event follow-up
  - Research-based stewardship plan
  - Targeted, personalized mailings/solicitations
  - Assessments of EVERY event (cost, value, need)
Thank you!
Questions?