ADVANCEMENT REPORT
For Budget & Resource Committee

April 14, 2016
Mike Andriatch, VP for Advancement & President, Brockport Foundation
Good News Stories

Distinguished Brockport Alumnus Makes Major Gift to College

$1.25 million gift will support Brockport students and faculty

BROCKPORT, NY—One of the nation’s leaders in the field of information security and public policy has committed to providing a variety of financial support to The College at Brockport. This gift by Dr. Eugene H. Spafford ’79 provides for both student and faculty support along with an annual lecture. The total amount of the gift will eventually exceed $1.25 million.
Charitable donations to Nazareth College increased 6.7 percent in the 2014-15 school year, boosted by fundraising for a new institute that gives undergraduates clinical experience in physical, occupational, speech, art and music therapies.

The $458,000 increase — from $6.87 million to $7.33 million — was reported in the annual Voluntary Support for Education survey released last week by the Council for Aid to Education.

The survey also showed giving increased 21.4 percent at The College at Brockport from $3.37 million to $4.1 million while charitable donations declined at the University of Rochester, the Rochester Institute of Technology and Hobart and William Smith Colleges.

The College at Brockport concluded a fundraising campaign last June with donations surpassing the goal by $1 million, according to Michael Andriatch, vice president for advancement. "A few six-figure gifts, including an estate gift and a large anonymous gift, came in during the final fiscal year to put us over the top," Andriatch said in a statement.
Leap for Brockport!

Donors Committed: 752
Dollars Raised: $103,578.50

From noon on Feb. 29 to noon on March 1 was an incredible 24 hours for The College at Brockport. Together we met, then exceeded, the two challenges put before us. Thank you to everyone who made this possible! Through your generosity, we've made a powerful statement about what the Brockport community can do together.
And much more news …

• President Macpherson in front of alumni
• NYC excursion/partnership with Academic Affairs, Career Services
• Sad passing of Frances Moroney Whited on New Year’s Eve
• Alumni Showcase Day last week
• ’70s Reunion on campus this summer
Other Highlights

• **112.8% INCREASE** in value of scholarships and awards since start of Campaign
• **47% INCREASE** in endowment since start of Campaign
• **59** planned gifts confirmed, totaling (in current dollars) **$7,291,211**, since 2010-11 (future dollars)
• **11.0% DROP** in salaries (including Campaign lines) from last year to this year
• **2.5% DROP** in permanent salaries from last year to this year
And more good news …

- **319% INCREASE** (to 1,048) in number of scholarship applications since advent of Academic Works (2011)
- **152% INCREASE** (to 630) in completed scholarship applications in same time period
- Endowment at **$10.3 million** (as of 3/31/16)
- Total Foundation assets (including $1 million+ in pledges) of just under **$14 million**
Not all is rosy …

• **21.7% DROP** in number of alumni donors from second year (2011-12) of Campaign to last year (national trend; continuing this year)

• **689% INCREASE** in number of on-line gifts since start of Campaign (good that people are using this method; bad in terms of bank fees per transaction)

• **PCI Compliance** (closing of lock box process; all of those gifts, >1,500, now managed on campus)
Impending issues/considerations

• Campaign is past us!

• Additional funds last several years:
  – $80K per year for Campaign Director (not replaced)
  – $50K per year for Development Writer (not replaced)
  – $30K per year for Annual Fund assistant (runs out July 31; won’t be replaced)
  – $18K per year for Phonathon automation (shutting down phonathon after this spring)
  – $30K per year for Campaign Consultant
Impending issues/considerations

- State and institutional budget issues in terms of investment (short and long-term)
- Campaign investments were temporary
- Continued outreach and engagement need to be resourced
- We have been fiscally frugal in 2015-16!
Impending issues/considerations

• Need to give our team the tools needed to succeed: technology, calling programs; using rollover to do so
• Best use of Gift Officers: not cold calling!
• Sponsorships for alumni events; fewer freebies
• Supporting departmental alumni outreach
• Development and Alumni liaisons
• Phonathon cuts/changes
Next

• Expectations for Division remain rightfully HIGH
• Participation and alignment with new Strategic Planning process; community engagement
• Already identified institutional priorities, such as scholarships, research, international programs
• Reviewing and revising our own Mission, Vision this summer to align clearly with Strategic Plans
• Winter Gala
• Summer UG Research
Areas of Strategic Investment

• Recently filled open Gift Officer position through internal search that found Nicole Dumbleton (Associate Director of Annual Fund); will need to back-fill Nicole’s position

• Scholarship Coordinator funded through temp service; would like to move to state line

• Potential of shared line with College Communications (have no designated Advancement Communication person; major void currently)
Areas of Strategic Investment

• Continue part-time Gift Officer position (former VP)
• Graduway (Foundation expense):
  – Will support engagement work and assist with Departments, Career Services
• EverTrue/Giving Tree software (state rollover):
  – Tool for gift officers in terms of research, analysis of donors
• Calling Program (Foundation expense):
  – Engagement among leadership, staff with alumni, emeriti
Areas of Strategic Investment

• Increased travel expenses:
  – Second year of new President; targeted visits with donor prospects and Board members after group engagement sessions this past year
  – Significantly more engagement opportunities through new Calling program
  – As Alumni partnerships grow (internally and externally), need for more visits/events
Future Divisional Needs

• As strategically planned initiatives take root, the need for more leadership and major gift officers/feet on the street will increase

• Gift officers in Schools (start with Business Administration & Economics) as a pilot (in 2017-18); joint initiative with Provost/Academic Affairs after first year with new Dean
Staffing Story

• Current levels
  – At 19.5 in 2016-17; high of 23 during Campaign
  – Major losses are on the Development side
  – Solid staffing levels in terms of back room operations (Advancement Services, Finance) and Alumni Engagement
  – Scholarship operation on solid ground

• Future needs (hiring plans for 2016-17)
  – Need more Gift Officers! Next Campaign …
Current Position Management

- Savings/losses considerable for size of team
  - Rox/Mike (2.0) down to only 1.5
  - Not filling Campaign positions
  - Resourced scholarships (one staff to team of 4-5) impacts external
  - Loss of Gift Officers impacts liaison work with departments
  - Makes fiscal sense, does not allow for continuity of program
Response to President’s Task Force

• Significant
  – Staffing previously mentioned
  – Cutting phonathon (ROI not there)
  – Cutting off-site Foundation meetings to one per year; evaluating staffing needs for each
  – Cutting back “social events” (not fiscally sound)
  – Sustainable practices for future
  – As we set goals for next Campaign, what are major priorities (as opposed to only enhancers)?
Questions?