

**Southern Miss**

**Annual Fund**

**Strategic Planning**

**Report for FY12**

**March 3, 2011**

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# Annual Giving at Comparable Institutions

Institutions in the Study: Texas A&M University – Kingsville, Troy University, University of Memphis, University of North Carolina Wilmington, and University of South Alabama

* Surveys were sent to 16 institutions of higher education deemed as comparable by looking at a variety of criteria including: age, student population, alumni base, and endowment. All of the above institutions are public. The five institutions listed above responded.
* The institutions in the study range in age from 48 years to 124 years, the average being 84 years.
* The institutions in the study range in the size of their alumni base from 42,000 to 130,000, with the average being around 75,000.
* Therefore, Southern Miss is on the high end of this pool of institutions, having a larger than average alumni base and being slightly older.
* Care was taken to not pick institutions with marquee degree programs (Law, Medical, Engineering, etc.) that might skew the results. The only program of that sort is the Medical School at USA and the respondent was kind enough to break out their fundraising results so that medical fundraising could be disregarded.

Annual Giving Averages (All results are reported for most recently completed FY.)

* Dollars raised: $599,532.84 (TAMUK was removed so as to not skew the results too high.)
* Gifts Obtained: 4,853
* Participation Rate: 12.36%
* Phone generates $136,746.60 and 1,573 pledges/gifts
* Direct mail generates $78,004.67 and 508 pledges/gifts
* E-solicitation generated $72,643 and 634 gifts. Though 3 out of the 5 schools do regular e-solicitations only one reported the dollars and pledges generated. It is worth noting the amount that this school reported, as this is a very low cost method of fundraising.

Southern Miss Annual Fund

* Dollars raised: $105,309.56 ($494,223.28 below average, performing at 17.6% of peer schools)
* Gifts Obtained: 1,403 (3,450 below average, performing at 28.9% of peer schools)
* Participation Rate: 1.55% (Based on having 90,000 alumni of record.)
* Phone generates $80,574.56 and 1,193 pledges/gifts (#5 out of the 6 schools examined)
* Direct mail generates $24,735 and 210 pledges/gifts (lowest among all 6 schools examined)
* Southern Miss in FY10 undertook no e-solicitations.
* Southern Miss does not have a parent giving program or student or senior class giving program.
* Southern Miss solicits and has gifts on record from friends, faculty, staff, retirees, corporations and foundations but not solicit them in any organized or segmented manner for the Annual Fund.

Annual Giving Programs

4 out of the 5 schools are engaging in the following programs: faculty and staff giving campaigns, social media, soliciting friends of the university, and high end annual giving recognition societies

3 out of the 5 school are engaging in: using email to steward donors, events, young alumni campaigns, student philanthropy education, senior class giving campaigns and special recognition or societies for first time donors and consecutive year donors.

2 out of the 5 schools are engaging in: high end annual personal visits, actively soliciting corporations and foundations for annual fund gifts and parent giving programs

Faculty/Staff/Retiree giving campaigns generate an average of $243,609.75 and 1,386 gifts.

Parent solicitation programs raise an average of $267,750 at these institutions and generate an average of 1,958 gifts.

Senior class giving programs get an average of 64 students (range is 29-200) to make their first gift to their alma mater and raise an average of $5,089.95.

Soliciting friends of the university (non-alumni) generates an average of $775,020.57 and 1,608 gifts.

A concerted effort to generate annual giving funds from corporations and foundations generates an average of $1,078,538.99 and 381 gifts.

Only one university reported the amount that they generate from events and it was $30,000. Only one university reported the amount that they generate from high end annual personal visits and it was $25,000.

The other items listed above but with no average results mentioned engage alumni and support the functions of the Annual Fund. These include the use of social media, high end annual giving societies, stewardship emails, young alumni campaigns, student philanthropy education, and recognition for 1st time donors and consecutive year donors.

Conclusions and Recommendations

The University of Southern Mississippi and the Southern Miss Annual Fund has a great deal of potential – potential to raise more money, involve more donors and expand our constituency base.

Based on my analysis, if the Annual Fund could bring our fundraising performance up to the average among comparable institutions and add e-solicitations as a component of the program, we could be raising$287,394 from 2,714 gifts. If we implement the stewardship and involvement items above, I believe this is a reasonable goal for the next 2-3 years.

If we were to expand into other constituencies over the next 5 years, we could be raising $2,657,403. Even if we perform at 50% of the average among the comparable institutions studied, we would still be at over $1.3 million. These programs take time to build up to get to this level, so adding them soon and then building a constituency base and some brand recognition will be key.

**Culture of Philanthropy**

Here are some elements of a positive culture of philanthropy, as defined by The Dini Partners in a report to Midwestern State University:

1. *Consistent fundraising results;*
2. *Broad involvement of volunteers and staff in the identification, evaluation, cultivation, solicitation, and stewarding of donors;*
3. *Language that clearly and unequivocally expresses fundraising as a positive, integral value;*
4. *Clear understanding that fundraising is one of the most important roles for leaders – both administrative and volunteer;*
5. *Institutional fundraising goals that are “owned” by both staff and volunteers;*
6. *A vocabulary which highlights the nobility of giving and the basic human dignity of those solicited; and*
7. *Expressions of fun, humor, and excitement surrounding the fundraising enterprise.*

The culture of philanthropy is weak at Southern Miss for a variety of reasons. It will be my recommendation later in this report that to create a stronger culture of philanthropy on this campus we must implement a faculty and staff fundraising campaign in FY12.

Similarly, exposing our students and young alumni to the need for annual support and making that case in a fun and exciting way will be central to the recommendations of this report. Creating a culture of philanthropy and familiarity with the fundraising enterprise among our most recent alumni and our future alumni is imperative.

**The Annual Fund**

The 2011-2012 Southern Miss Annual Fund will focus on eight areas of emphasis including five campaigns:

1. Southern Miss Annual Fund: campaign in fall 2011 including phone, email and mail which will solicit for the Southern Miss Fund as a general university appeal
2. College Campaign: campaign in spring 2012 including phone, email and mail which will solicit for each of the five college for unrestricted unit support
3. Data Integrity and Enrichment: Comprehensive research plan to support the mail and phone campaigns as well as a few targeted projects to promote data enrichment for the benefit of the entire Foundation
4. The GOLD (Graduates of the Last Decade) Campaign: a campaign launched in the summertime to engage and involve young alumni from the last ten years
5. The Campus Campaign: participation driven campus campaign to get as many faculty and staff to make a gift as possible
6. Class of 2012 mini-campaign: first foray into student giving with a few inexpensive methods including a postcard, email, and welcome booths on campus
7. Parents mini-campaign: data collection and sending out two cultivation e-newsletters tailored to parents with soft asks and links to online giving opportunities
8. Stewardship and Fulfillment: Focused on donor responsiveness and special recognition of milestones (1st gift, 3 years+ consecutive support, or $500+ annual giving), special emphasis on showing through video what the gifts go to support and how they make a difference
* Identification:
	+ Research
	+ Segmentation
	+ Expanding Constituencies
* Engagement:
	+ Young Alumni
	+ Students
	+ Faculty & Staff
	+ 1st Time Donors
	+ Friends of the University
	+ Consecutive Year Donors
	+ High Level Annual
* Campaigns/Case-building:
	+ Southern Miss Annual Fund
	+ Young Alumni
	+ College Campaign
	+ Faculty & Staff
	+ Class of 2012 mini-campaign
	+ Parents mini-campaign
* Solicitation:
	+ Phone
	+ Direct Mail
	+ Email
	+ Other Methods
* Fulfillment:
	+ 30, 60, 90 Day Reminder Cycles
* Stewardship:
	+ Thank you cycles
	+ Quarterly college stewardship
	+ Special stewardship groups

**Goals**

Below is the breakout of the projected dollars and donors raised through the programs that are proposed in this strategic plan.

Southern Miss Annual Fund: $183,128.80

College Campaign: $147,592.00

Campus Campaign: $40,625

Class of 2012: $1,000

Parents Fund: $12,500

TOTAL for FY12: $384,845.80

Southern Miss Annual Fund: 2,386

College Campaign: 1,856

Campus Campaign: 325

Class of 2012: 100

Parents Fund: 100

TOTAL for FY12: 4,767

Another important goal is cost/dollar raised and dollars to acquire a donor. These will ensure a strong return on investment and make the annual fund healthy for the long-term. Based on my projections and budget, our overall cost per dollar raised will be $0.48 and that should decline over time, as we have to expend fewer resources on acquisition and data integrity and can focus more on stewardship and retention. This statistic is useful not just for monitoring the success and ROI of individual projects, but you can see from a wholistic perspective where you are investing more resources for the long-term health of the program.

For instance, here is the breakdown of cost/dollar raised as projected for FY12:

|  |  |  |
| --- | --- | --- |
| Campaign | Cost/Dollar Raised | Cost/donor |
| Southern Miss Annual Fund | $0.42 | $31.85 |
| College Campaign | $0.51 | $40.68 |
| Campus Campaign | $0.12 | $14.77 |
| Class of 2012 | $2.00 | $20.00 |
| Parents' Fund | $0.34 | $42.50 |
|   | $0.46 | $31.25 |

So, we can see from this chart that the hardest dollar to raise will be from the students. However, we can also see that it is much cheaper to acquire that donor now and then steward them properly and keep them rather than waiting to acquire them after they graduate when it much more expensive to acquire them. The faculty and staff campaign will be our best return on investment, followed closely by the parents. We have the most work to do with the general alumni population and we should be able to set some good benchmarks this year in those areas and as our data integrity improves (lowering our research costs and improving our contact rates) our cost per donor and cost per dollar raised will diminish in those areas.

**Case for Support**

The philanthropic appeal for the University of Southern Mississippi should emphasize the need to maintain the highest quality educational experience possible for all students. It should underscore the differences that can be achieved with the generous and consistent support of alumni and friends who provide gifts to the annual fund campaign. Also, it should address the University’s decision to choose this time in its history to initiate a formal, organized annual fund campaign. Finally, it should focus on the fact that gifts may be designated for support of a variety of areas on campus.

Incorporating personal testimonials of the difference Southern Miss has made in individual lives and why those persons have chosen to support the University is recommended. Each of the individual campaigns undertaken by the Annual Fund should have its own particular appeal but draw from the central case for the Southern Miss Annual Fund. The language from the case statement will be used in all fundraising materials including phone scripts, mail pieces, letters, website, email, videos, or other giving literature.

**Southern Miss Annual Fund and the College Campaign**

**General University appeal**

Most universities are now doing a tandem yearly ask cycle in the annual fund. This usually manifest as a general appeal for university support in the fall followed by a college/school/unit based appeal in the spring (or vice versa). I propose designating the fall for the general university appeal, called the southern miss annual fund.

**Segmentation**

**Fall 2011 – Southern Miss Annual Fund**

* Alumni: Current & recent donors to the Foundation
	+ Current equals = gift in FY11
	+ Recent equals = gift in FY10, FY09, FY08, FY07, or FY06 (last five fiscal years)
		- Pull out a special group for Honors College
		- Pull out a special group for Libraries
* Friends: Current & recent donors to the Foundation who are non-alumni
	+ Current equals = gift in FY11
		- Sub-segment by area of last gift: for example Dixie Darlings, Symphony, Library, etc.
	+ Recent equals = gift in FY10, FY09, FY08, FY07, or FY06 (last five fiscal years)
		- Sub-segment by area of last gift: for example Dixie Darlings, Symphony, Library, etc.
		- Pull out a special group for Honors College
		- Pull out a special group for Libraries
* Alumni: All non-donors and lapsed donors to the Foundation
	+ Non-donor = no gift to the Foundation ever
		- Sub-segment by graduation year
		- Pull out a special group for Honors College
		- Pull out a special group for Libraries
	+ Lapsed donor equals = has a gift on file but it is not since before FY06

**Spring 2012 – College Campaign**

* {Insert Particular College}Alumni: Current & recent donors to the Foundation
	+ Current equals = gift in FY11 and/or gift in Fall
	+ Recent equals = gift in FY10, FY09, FY08, FY07, or FY06 (last five fiscal years)
* {Insert Particular College}Alumni: All non-donors and lapsed donors to the Foundation
	+ Non-donor = no gift to the Foundation ever
		- Sub-segment by graduation year
		- Consider breakout groups for specific large units (Accounting, English, Chemistry, Music, etc)
	+ Lapsed donor equals = has a gift on file but it is not since before FY06
		- Sub-segment by graduation year
		- Consider breakout groups for specific large units (Accounting, English, Chemistry, Music, etc)

Here are a few examples of how this strategy would play out (from the donor’s perspective) depending on which group you are in:

Alumni current donor or recent donor:

August –September: phone call for general university appeal

Late October (assuming no positive response to phone call): direct mail

November: (assuming no positive response to direct mail): e-solicitation follow up

December (assuming no positive response to all of the above): calendar year end appeal

(If they do have a positive response, they will enter the stewardship cycle, details to follow)

February - March: phone call on behalf of the college (whether they gave or not to the fall appeal)

April: (assuming no positive response to phone call): e-solicitation

May: (assuming no positive response to e-sol): fiscal year end college appeal

Friend donor:

August –September: phone call for general university and referencing their area of interest

Late October (assuming no positive response to phone call): direct mail

November: (assuming no positive response to direct mail): e-solicitation follow up

December (assuming no positive response to all of the above): calendar year end appeal

(If they do have a positive response, they will enter the stewardship cycle, details to follow)

No spring solicitation.

Alumni non-donor or lapsed donor:

Late August: direct mail to priority non-donor groups

September (assuming no positive response to direct mail): e-solicitation follow up

October - November: (assuming no positive response to any of the above): phone call for general university appeal

December (assuming no positive response to all of the above): calendar year end appeal

(If they do have a positive response, they will enter the stewardship cycle, details to follow)

February: e-solicitation for colleges to all non-donors/lapsed donors

April: (assuming no positive response to phone call and first e-solicitation): e-solicitation to non-respondents

May: (assuming no positive response to any of the above): fiscal year end college appeal

**Annual fund stewardship and Fulfillment Plan**

Life Cycle of a Pledge

* Pledge is made over the phone or set up through some other means
* Pledge acknowledge goes out (1 day later) Emphasizing 30 day due date or whatever was agreed upon at the time the pledge was set up
* 30 days from pledge date: Reminder #1 goes out – Friendly letter signed by Jessica & e-reminder with link to giving site
* 60 days from pledge date: Reminder #2 goes out – Postcard with basic, non-customized text and the URL of the website and a form email goes out with giving link
* 90 days from pledge date: Reminder #3 goes out – Overdue bill style note with similar email
* 120 days from pledge date: Reminder phone call (if it happens to match up with Stockade’s reminder calls, great. If not, Jessica will make calls or student workers in the Foundation can be trained to do them) Focus should be on getting fulfillment of the pledge on a credit/debit card

Once the pledge becomes a gift:

* Within 1 week of gift: Thank you postcard & email goes out – Jessica with student worker help
* Within 1 month of gift: Thank you call takes place – Jessica, students or Stockade
* I would also like to see each college take some responsibility for thanking pledges, perhaps we get them a list quarterly and they must commit to having Dean’s office staff or departmental staff contact them through at least email and phone.
* Email Stewardship videos from students saying thank you twice per year (fall and spring) Post videos on Foundation website as well. Send a postcard with the URL to anyone without an email on file. Through that URL make them create a log-in and register with an email to capture it.

Special Cycles: First time donors

* + Come up with a first time donor packet. Include information about what the Southern Miss Fund and other funds on campus support, perhaps with a story of a student who benefited. Perhaps one seriously inexpensive premium, like a car decal or luggage tag. This should go out within 1 week of the gift.
	+ In addition to this, all language on the thank you postcard, calls and emails in the stewardship cycle should include some recognition that this is the first time they have made a gift. Welcome to our family of donors language.

Special Cycles: Southern Society ($500+)

* + Phone call within one week from Jessica, plus all other regular stewardship
	+ Phone call from Dean or department chair quarterly if gift was to a specific unit
	+ Certificate and special packet sent out within one week inducting them into the Southern Society and informing them of the meaning of the Southern Society and benefits. Include information about what the annual gifts support, perhaps with a story of a student who benefited. Perhaps one seriously inexpensive premium, like a car decal or luggage tag.
	+ Post names to the USM Foundation website semi-annually

STEWARDSHIP FULFILLMENT TIMELINES FOR STAFF

Daily: Pledge Acknowledgements go out from Stockade

Weekly:

* Pull list of gifts for that week
* Send all TY postcards and emails
* Send 1st time donor packets
* Call all $500+ gifts
* Send out all Southern Society Welcome packs

Monthly:

* Pull all outstanding pledges and send all 30, 60, 90 day mail and email sends
* Do 120 day fulfillment/reminder calls
* Thank you calls to all non 1st time or Southern Society donors

Quarterly:

* Get TY data to appropriate colleges and units for their Thank you components
* Deans and Chairs call Southern Society members and thank them when appropriate

Semi Annually (fall and Spring):

* Produce a Stewardship video with Student saying Thank you and talking about how support has made a difference in their education
* Post online and send via email
* Send postcard to those without email addresses on the donor list with the registration based URL to see video and capture email address
* Post Southern Society names to Foundation website

**Database Integrity and Enrichment**

**Annual Fund FY12 Timeline**

**Fiscal Year 2011-2012**

**Campaigns/Areas of Emphasis**

1. Southern Miss Annual Fund (general university appeal)
2. College Campaign for unit unrestricted funds
3. Stewardship and fulfillment infrastructure
4. Young Alumni Campaign
5. Faculty and Staff campaign
6. Class of 2012 Senior mini-campaign
7. Parent mini-campaign
8. Data integrity and enrichment

**May 2011**

1. Determine preliminary 2011-2012 Annual Fund Goal;
2. Ascertain the type of weekly, monthly, quarterly, and year-end reports needed to evaluate annual fund progress and success.
3. Host first USM Foundation Graduation tent
4. Work with Dean’s Office to implement a Student Demographic Info Sheet that must be filled out prior to the student’s application for graduation is accepted (starting with August graduation)
5. Work with HR to implement faculty staff giving info in new hire packets
6. Send a welcome letter to early acceptance parent and get the Parent data sheet filled out
7. Create first time donor packets, consecutive year donor packets, and high-end Gateway Club donor packets

**June 2011**

1. Send out Fiscal Year End (FYE) pledge reminders to all outstanding pledges
2. Send out a stewardship letter and/or video with President Saunders featured
3. Confirm gift receipting process via payroll deduction, automatic bank draft, and credit cards.
4. Send off research to Blackbaud’s Address Finder
5. Send data off to Wireless ID research (Anchor)
6. Finalize segmentation for phonathon and direct mail
7. Prepare materials for first direct mail solicitations and select direct mail vendor (General University appeal)
8. Launch Business card raffle, overlapping with young alumni campaign, with email and postcard

**July 2011**

1. Send prospects that were not identified as wireless to Blackbaud’s Phone Finder
2. Send off research to Blackbaud’s Email Finder
3. Launch Young Alumni campaign – postcards, Facebook, email (non-solicitation)
4. Identify potential Faculty Staff campaign volunteer leaders and send a personal thank you note and/or email
5. Prepare a list of FY11 Faculty/Staff donors
6. Attend summer orientation sessions and cultivate parents
7. Visit admissions with D.O.s to identify parent major gift prospects
8. Submit data request for phonathon and mailing lists
9. Begin running weekly and monthly fulfillment and stewardship processes
10. Begin sending 1st time, consecutive year and high-end donor packets

**August 2011**

1. Send off any bad numbers from last year’s phonathon to Advanced research (if we did not find new data from the most recent Blackbaud research)
2. Commence Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff
3. Prepare Class of 2012 Campaign
4. Run final FY11 fulfillment numbers
5. Present FY11 final report to Advancement staff and select administrators
6. Send data to Stockade and begin phonathon calls to Donors
7. Host an Annual Fund Open House with Deans and select senior administrators
8. Get as many Advancement/Foundation staff as possible to assist with move-in day
9. Begin thank you visits to high level faculty and staff annual fund donors
10. Late August: Mail appeal signed by President and Annual Fund Chair Aubrey Lucas to the following prospect segments: \*

Outsource: 1. Non-donor alumni (not alumni members)

* Bulk-rate postage sent from the mail house, live stamp, non-profit rate.
1. Non-donor Alumni past and current Members
* Bulk-rate postage sent from the mail house, live stamp, non-profit rate.
* Joint appeal educating on differences but pitching for both

In-House: 1. Honor Club,

* Non-Donors & Lapsed
* First-class postage, live signatures, and personal salutations.

**September 2011**

1. Phonathon continues work with current and recent donors
2. Send results of the Advanced Research to be called
3. E-solicitation follow-up to the Non-Donor and Lapsed DM appeals
4. Send postcards to senior class members along with e-solicitation for Class of 2012 campaign, Launch Facebook page.
5. Conduct personal, face-to-face solicitation visits with all University Advancement staff
6. Load Freshman parents into Raiser’s Edge if possible
7. Send a postcard linking parents to a website where they can download and submit a PDF Parent data form. This will get us information on any non-Freshman parents and give us an idea if any should be researched and assigned as major gift prospects
8. Send out first round of quarterly stewardship packets to the Dean’s staff
9. Attend Family Day (if there is one) and begin cultivation of parents
10. Continue thank you visits to faculty and staff annual fund donors
11. Launch monthly fulfillment/reminders processes

**October 2011**

* + - 1. Calling donors through the phonathon ceases (should be at 75% completion)
			2. Calling begins for non-donors and lapsed including VIP (make sure those who gave through the mail have been removed)
			3. Late October: Mail appeal signed by President and Annual Fund Chair Aubrey Lucas to the following prospect segments: (Remove those who gave through phonathon)
				1. Outsource: Alumni donors

First-class postage, live signatures, and personal salutations;

Specific gift request incorporated into letter.

* + - * 1. In-House: Honor Club, Always Southern Miss and Gateway Club Donors

First-class postage, live signatures, and personal salutations.

* + - 1. Incorporate Southern Miss Annual Fund at Homecoming;
				1. Announce Annual Fund Goal and provide pledge cards at Homecoming registration.
				2. Host a tent in the District with hot dogs and hamburgers
			2. Host some sort of small booth on campus for the Class of 2012 campaign that plays off of mid-terms. Give out Red Bulls or other energy drinks so that student come to talk to us about the campaign
			3. Participate in Graduation Fair.
			4. Commence Annual Fund Spotlight piece in weekly campus e-mail bulletins to faculty and staff,
			5. Conduct College Campaign meetings with Deans and senior faculty to strategize cultivation and solicitation plans for units in the spring
			6. Send personal invitations to be Faculty Staff campaign volunteers
			7. Create parents webpage

**November 2011**

1. E-solicitation follow-up to any current and recent donors who have not yet given through the DM and phone appeals
2. Calling continues for non-donors and lapsed including VIP (make sure those who gave through the mail have been removed)
3. Create an e-newsletter for Parents with a soft sell about the launching of a Parents Fund on campus. See if Student Affairs would like to partner with us to make a hard copy to send out as well. Links to Annual Giving special parents page.
4. Get confirmed commitment from Faculty staff volunteers
5. Produce Stewardship video which will launch in December

**December 2011**

1. Send out Calendar Year End postcard appeal to non-responding alumni & friend prospects (early December)
2. Send out CYE e-solicitation to non-responding alumni & friend prospects (Late December)
3. Send out postcards driving donors to our stewardship video (early December)
4. Send out thank you email driving donors to our stewardship video (early December)
5. Send out holiday card to all fall donors
6. Send out quarterly stewardship packets to the Dean’s staff
7. Prepare DM and phonathon content for spring college campaigns
8. Submit data requests for DM and phone lists for spring for colleges

**January 2012**

1. Complete statistical review of calendar year
	* Track statistics of donors and source of response method: direct mail, website, phone
	* Calculate all costs per dollar raised
	* Report calendar year-end annual fund results to University Advancement team
2. Host a welcome back booth on campus with free cokes, Have information about the Senior Class gift campaign
3. Plan launch of faculty staff campaign, follow up with volunteers
4. Prepare giving packets for fac/staff campaign

**February 2012**

1. Host an ice cream social kickoff for the faculty staff campaign, give a presentation on what is in the giving packet and how to utilize it, Give out mini-Payday candy bars for volunteers to keep in their offices along with Payroll Deduct forms
2. One week later, send out a video email message from Dr. Saunders about the importance of participating
3. Create a faculty staff giving page with information about giving and update it monthly with departmental participation percentages.
4. Monthly updates on faculty staff email loop on participation levels – maintain a fac/staff giving webpage where all department results will be posted
5. Send e-solicitation follow up for the senior class gift campaign
6. Drop e-solicitations for colleges to non-donors
7. Begin calling for 2nd ask and soft refusal from donors for college campaign
8. Send off bad phone numbers from fall calling campaign to Advanced Research

**March 2012**

1. Send out mail piece for colleges to the non-donors who did not respond to e-appeal and others in that category without emails on file
2. Continue calling for 2nd ask and soft refusal donors
3. Send results of the Advanced Research to be called
4. Co-host an event with the Legacy and student affairs around Founder’s Day to conclude the Senior Gift campaign and wrap it up
5. Monthly updates on faculty staff email loop on participation levels – maintain a fac/staff giving webpage where all department results will be posted
6. Recognize 100% participation units with a pie or cake. (100% participation is either “A piece of cake” or “Easy as Pie”)
7. Request monthly annual fund update reports from Database Administrator and evaluate progress;
8. Participate in Graduation Fair.
9. Send out quarterly stewardship packets to the Dean’s staff
10. Create an e-newsletter for Parents with a soft sell about the launching of a Parents Fund on campus. See if Student Affairs would like to partner with us to make a hard copy to send out as well. Links to Annual Giving special parents page.

**April 2012**

1. Calling should be complete for 2nd ask donors and soft refusals donors
2. Send e-solicitation to non-contact and no pledge 2nd ask and soft refusal donors
3. Begin calling all non contact non-donors and soft refusal non-donors for colleges if they did not respond to email or mail campaign (Be sure to remove those)
4. Monthly updates on faculty staff email loop on participation levels – maintain a fac/staff giving webpage where all department results will be posted
5. Recognize 100% participation units with a pie or cake. (100% participation is either “A piece of cake” or “Easy as Pie”)
6. Send personal emails to hold-out faculty staff non-donors
7. Attend Honors Banquet and/or Awards Day for units/colleges for cultivation opportunities;
8. Host 1st Annual Gateway Club black tie event

**May 2012**

1. Determine preliminary 2011-2012 Annual Fund Goal;
2. Host first USM Foundation Graduation tent
3. Send College Campaign End-of-Fiscal Year appeal to those who have not responded from previous mailings, also send corresponding email at the same time This will include non contact non-donors and soft refusal non-donors who have not yet received a mailing (save on costs).
4. Wrap up faculty staff campaign with another video email/blog posts from Dr. Saunders and recognize 100% participation units.
5. Determine fall Phonathon & DM segmentation and request lists.
6. Conduct an audit of research and data integrity practices
7. Check in with HR to make sure faculty staff giving info is still new hire packets, update info sheet to include results of the first campaign and 100% departments
8. Send a welcome letter to early acceptance parent and get the Parent data sheet filled out
9. Conduct a stewardship and fulfillment infrastructure audit. Update materials as necessary.
10. Finalize fall phonathon and direct mail segmentation
11. Produce Stewardship video which will launch in June

**June 2012**

1. Send off research to Blackbaud’s Address Finder
2. Send data off to Wireless ID research (Anchor)
3. Send out postcards driving donors to our stewardship video
4. Send out thank you email driving donors to our stewardship video
5. Prepare materials for first direct mail solicitations and select direct mail vendor (General University appeal)
6. Send out Fiscal Year End (FYE) pledge reminders to all outstanding pledges
7. Identify prospects and set goals for high end annual visits
8. Recruit Parent Fund volunteers
9. Send out quarterly stewardship packets to the Dean’s staff
10. Launch Business card raffle campaign in coordination with Young Alumni campaign
11. Host 1st annual Always Southern Miss event (less formal, more fun than GC event)

**July 2012**

1. Mail stewardship letter requesting biographical information to select alumni
2. Attend Freshman orientation sessions and cultivate first-year parents
3. Submit data requests for phonathon and direct mail for fall
4. Begin high end annual visits
5. Visit admissions with D.O.s to identify parent major gift prospects
6. Send prospects not identified as wireless to Blackbaud’s phone finder
7. Send prospects to Blackbaud’s email finder

**August 2012**

1. Produce final FY12 fulfillment reports
2. Host an Annual Fund Open House with Deans and select senior administrators;
3. Present FY12 Annual Fund Report to Advancement staff and select administrators
4. Send off bad numbers from spring phonathon (that do not get new results through normal research) to Advanced research