



2006-2007 Unit Action Plan

Division:

University Advancement and Marketing

College/Unit:

Advancement

Department:

Advancement

Significant Areas of Success:

We need to create a Learning Centered University.

- Trained Major Gift Officers (MGO) in key areas of cultivation, solicitation and closing. Three key components encompass the orientation and strengthening of an advancement team: institutional knowledge, development principles and operations and constituency data. MGO staff attended the off-site training sessions along with CASE seminars, Association on Governing Boards workshop, prospect research conferences, The Big Ten Fundraising Institute and training in PG Calc to support gift annuity agreements. Bentz Whaley Flessner, UA & M fundraising consultants, provided 11 webinars covering best practices in the advancement field.
- Provided off-site training to administrative assistant staff who support MGO's.
- Streamlined and documented policies and procedures for MGO team to include a major gift mission statement, advancement glossary, travel procedures, event protocol, President's home events and roadbooks.
- Standardized the gift documentation process through the use of Letter of Intention and Declaration of Intention process.
- Assessed the effectiveness and efficiency of the major gift program. Sustained the focus and energy on the central mission that fundraising is key and is accomplished by defining the scope and nature of each MGO's workload, determining the amount and quality of interactions that major gift staff should pursue with prospects, establishing how many successful solicitations each officer should achieve within a given period, and setting fundraising goals.
- Created a plan for action to assist MGO's in meeting their goals of 175 face-to-face visits and a minimum of 20 solicitations per year.



- Developed a qualifying process to establish individuals to serve on the President's "Commission on the Future." The creation of a blue-ribbon task force is necessary if Ferris is to secure the philanthropic support of the enormity needed to advance its vision for greater leadership and service in the coming decades. The Commission is composed of key decision-makers and individuals of influence who have distinguished themselves by their accomplishments and their community service. The initial meeting will be held on November 3, 2006, and the "unveiling" of the Commission will be at the Ferris Foundation Benefit on November 3, 2006.

We must work together and become an engaged campus.

- Hired assistant vice president for advancement to oversee major gift activities.
- Hired a full-time administrative assistant to the executive director of the Ferris Foundation. This position assists with the day-to-day functions and the formulation of overall Foundation objectives, policies, plans and procedures by serving as a liaison between the Executive Director of the Ferris Foundation, the Foundation Board of Directors and University administrators.
- Strengthened the prospect management operation by overhauling prospect research strategy meetings and created policies and procedures for research and prospect management. The process was initiated by reviewing the use of the prospect module in Millennium, developing procedures for moves management, and realigning protocol for primary and secondary prospect management programs. Recording and sharing the University's prospect and donor history is paramount and central to the advancement team.
- Realigned staff to support the major gift operation. The manager of prospect research was advanced to assistant director of prospect research and relationship management; the adult-part time administrative assistant position was moved to full-time temporary; upgraded athletic advancement position to associate athletic director for advancement; refocused major gift officer away from Kendall Foundation to focus solely on major gift donors on behalf of Kendall College of Art and Design.
- Expanded the number of endowments from seven in FY05 to 19 in FY06, as of 2/15/06. This is an increase of 171%.
- Increased major gifts (\$10,000-\$99,999) to \$1,108,851.23, as of 2/15/06. This is an increase of 65% over FY05 total of \$670,875.61.



- Closed four planned gifts totaling \$1,920,000 as of 2/15/06. With the addition of a new gift vehicle (gift annuity program) utilizing Fifth Third as the administrator, the first annuity has been established.
- Increased, with the support of Alumni Relations, Ferris Foundation Board of Directors, and the campus community, the number of attendees (400) and sponsorships (\$97,500) by 30% for the 2005 Ferris Foundation for Excellence Benefit.
- Doubled the number of personal visits by the MGO team (309 visits as of 2/15/06).
- Established a series of donor events hosted by President and Patsy Eisler at their home.
- Conducted in conjunction with the Construction Technology and Management department, the Michigan Construction Hall of Fame Distinguished Constructor Award event representing the Associated Builders and Contractors, Associated General Contractors of America, Construction Association of Michigan, Michigan Infrastructure and Transportation Association, Michigan Association of Home Builders and Ferris State University's Construction Technology and Management department. The ceremony also marked the unveiling of the Hall of Fame's commemorative display in the Granger Center.
- Supported, with the leadership of the Athletics Department, the Athletic Hall of Fame. Ten athletes spanning six decades including a veteran coach were included in the 2005 class.
- Established the Lunch and Learn program to educate the campus community on planned giving options. The purpose of the seminars are to help the Ferris community achieve important financial and estate planning goals and to act as an on-campus resource.
- Hosted Canadian Lakes community event, "An Evening of Music," featuring the Ferris State University Community Summer Band. More than 500 people attended.
- Documentation begun on scholarship and endowment reporting process including gift closure, financial aid, application, awarding and stewardship process.



Ongoing or Proposed Significant Activities:

We need to create a Learning Centered University.

- Continue to establish policies and procedures for MGO's to include Presidential protocol, travel procedures and gift acceptance policies.
- Maintain on-going professional development for the MGO Team.
- Continue to monitor and assess performance expectations. Every MGO will be required to document 175 face-to-face visits during FY06-07.
- Review and analyze the prospect management report, prospect management general guidelines, rating codes and contact report forms. Tracking solicitations and closes along with coding top 20 prospects will be on-going.
- Continue to design mechanisms for engaging deans in the development process.
- Institute University and Advancement educational component into Summer University '06.
- Establish an advancement book club, endorsed by the President, for members of the President's Council, Deans, major gift officers and advancement office.

We must work together and become an engaged campus.

- Continue to lay the foundation for establishing and implementing the President's "Commission on the Future" in preparation for their initial meeting on November 3, 2006. The resulting programs and initiatives from the Commission will form the basis of Ferris' philanthropic agenda, the rationale for its campaign and the justification for its dollar goal. This agenda will be reviewed and prioritized by President Eisler and his leadership team. President Eisler will then share the prioritized fundraising agenda with the Board of Trustees and the Foundation Board of Directors and charge the Foundation with developing a campaign plan under the direction of University Advancement and Marketing.
- Continue internal audit of staff in preparation for the capital campaign. (1) **Director of major and planned gifts.** With 25,000 major gift prospects and 16,000 planned gift opportunities, the hiring of a director of major gifts and planned giving is essential. This position will assist the advancement office with meeting the needs of the colleges for Tier 1 prospects. (2) **Coordinator of special events.** For a major gifts program to reach its potential, staff time must be focused solely on the cultivation and solicitation of



major gift prospects. The staff is currently devoting too much time in donor based events, taking away from cultivation, solicitation and stewardship. Hire a FTE events coordinator to cover athletic box coordination, the Foundation for Excellence Benefit, dinners at the President's home, cultural events with the President, donor recognition societies, the Evening of Appreciation Foundation event, coordinate high level donor lunches/dinners on and off campus, and assist in Hall of Fames. (3) **Manager of scholarships.** Establish the position of scholarship manager to provide stewardship for all privately funded scholarships. This would include monitoring and facilitating the entire process beginning gift closure, through application and award, and the entire stewardship process.

- Expand S&E to support the major gift operations. The current base budget is inadequate to sustain the present pace of development activities that support the goals and objectives of the Advancement Team.
- Position the MGO team to continue successful fundraising efforts by establishing personal goals of 175 face-to-face visits per year.
- Continue documentation of scholarship and endowment reporting process to include gift closure, financial aid, application, awards and stewardship process.
- Expand and grow the prospect management processes and systems. Verify and test Millennium information in conjunction with Advancement Services to validate significance of cleansing the entire database.
- Work with the president, the vice president for University Advancement and Marketing and the Ferris Foundation to plan and prepare for the capital campaign. First, develop and review the strategic plan and commit to them in writing. This exercise will clarify the organization's mission, timeframe and budget for the campaign. Internal rating and a feasibility study will produce a table of needed gifts that clarifies various giving levels and the number of donors and prospects required at each level to reach the campaign goal.
- Continue to provide and facilitate development opportunities for the Michigan College of Optometry building and the Foundation's mini-campaign to support the Jim Crow Museum and need-based scholarships.
- Support the acquisition and strategies to add and engage parents as a constituency at the University. The power of parent programs is the deeply personal interest parents have in their children's lives, followed by the propensity for participation, the desire for positive reinforcement and their willingness to give back. The philanthropic implications are boundless and the institution really cannot afford not to inform and involve parents.



2006-2007 Unit Action Plan

Division:

Advancement & Marketing

College/Unit:

Department: Alumni Relations, Annual Giving and Advancement Services

Significant Areas of Success:

We must work together and become an engaged campus.

Alumni Relations

- Conducted new and successful alumni events in Traverse City, MI, Chicago, IL, Denver, CO, and Phoenix, AZ, welcoming more than 400 first-time participants.
- Facilitated, in partnership with the Office of the President and Academic Affairs, the 2005 Presidential Bus Tour, which welcomed more than 600 alumni and friends at 9 locations throughout Michigan (does not include meetings with community college partners).
- Connected with more than 15,000 alumni and friends, many through collaborative initiatives in partnership with other campus departments.
- Facilitated, with the support of the Ferris Foundation and in collaboration with the entire campus community, the most attended (400 guests or 30% increase), and most sponsored (\$97,500 or 30% increase) Ferris Foundation for Excellence Benefit.

Annual Giving

- Increased cash gifts to Ferris totaling \$2,493,700.09, as of 2/8/06. This is an increase of 13% as compared to FY05. The number of donors giving to Ferris has also increased 19%.
- Increased cash giving response specifically to the Fall Annual Fund Appeal by 64% or \$44,801.80 as compared to the FY05 Fall Annual Fund appeal, \$28,034.00.
- Fall telemarketing realized 1,391 pledges, totaling \$71,911.94. As of 2/15/06, 1,312 pledges were fulfilled totaling \$79,690.08 or 111%.

Advancement Services

- Converted all of Kendall College of Art and Design's constituent contact data (more than 3,000 records) to our Millennium system. Efforts are underway to significantly improve the accuracy of 65% of those records.
- Improved the accuracy of all 140,000+ constituent contact data in the Millennium system by 2.28% to 81.88% accurate for primary contact information. This is significant considering that 24% or more than 31,000 records have been updated this FY.



- Changed the chart of accounts in the Millennium system to interface more directly with the new Banner FOAP system. This includes adjusting account information on all of the endowed scholarships to the Banner FOAP to allow for greater automation and efficiency with the implementation of an online scholarship awarding system for the endowed scholarships.
- Added identifying attributes, with the assistance of Student Leadership and Activities, to the data records of nearly 10,000 alumni regarding their membership/participation with various fraternities/sororities while attending Ferris. This data greatly assists our advancement operation as we continue to research and evaluate our graduates as donor prospects.

Ongoing or Proposed Significant Activities:

We must work together and become an engaged campus.

- Increase the Alumni Relations, Annual Giving and Advancement Services S&E General Fund.

We have expanded our staff by 40% over the last five years. As a result our basic S&E expenses have nearly doubled. At our current levels, we annually have less than \$.60 per alum to conduct Alumni Relations, and less than \$2.00 per alum to conduct annual giving solicitations. Even with significant efforts to expand collaboration and improve efficiency we are still experiencing significant challenges that must be addressed, including:

- Increases in postage, travel and entertainment costs.
 - Consistent growth of our constituency base of 2-3% or approximately 1,800-2,400 new alumni each year, increasing the costs for everything we do.
 - A growing strategy to integrate greater segmentation with our annual fund appeals.
 - An aggressive telemarketing strategy to acquire new donors.
 - Immediately expand our user seat license for the Millennium system – adding ten users to accommodate the growing numbers of staff working with alumni and advancement initiatives.
 - Engage a service provider to research our alumni contact and business contact data to strengthen the Millennium system, including improving our contact data accuracy to 90%, our e-mail accuracy to 50%.
- New Full-time Position – Assistant Director, Parent Relations and Young Alumni Programs

We need to engage our parents to help us continue to enhance retention, provide greater annual fund support, expand our pool of major gift prospects and to connect us with their business, industry and public service networks. This position would be responsible



for collaborating with various departments of Student Affairs and to coordinate

- Parents Advisory Council
 - Parents Weekend
 - Parents Newsletter (each semester)
 - Parents Annual Fund Appeal (each semester)
 - Transition of parents contact data from Banner to Millennium
 - Activities designed to assist graduates (10 years or less) with networking, University involvement (speaking at campus events)
 - Supervise the Student Alumni Gold Club
- New Full-time Position – Advancement Communications Specialist

Significant expansion and enhancement of our solicitations and invitations to our alumni and friends has created a large influx of interest and support. Response to this interest and support must be done in a timely, efficient and professional manner. Event materials must be produced in pace with scheduling more activities. Gift acknowledgment letters should be written, signed and mailed out within 48 hours of a gift being made. Our current staff capacity and workload priorities are unable to meet such standards which ultimately could stall our advancement with our constituents. This position would be responsible for writing various alumni and advancement materials, including but not limited to

- Annual Fund Fall and Spring Appeals
- Special advancement projects' case materials
- Event invitations
- Ferris Foundation, Bulldog Bytes and Reflections newsletter stories
- Gift acknowledgement letters for donations \$500 and above (approx. 750 per year).

This position would also work collaboratively with University Marketing and Communications to support other University writing projects.

- Increase Our Giving Goals

Raise total cash gifts of \$4,000,000.00 in FY07 (excluding extraordinary gifts and in-kind gifts). This represents an increase of nearly 5% from our FY06 goal.

- Database Cleansing

We need to engage a consultant or service, in collaboration with University Advancement, to examine all of our constituent data (140,000+ records) to research

- Home, business and e-mail contact information
- Personal and professional affiliations and interests
- Prospect evaluation and qualification



This information is critical to evaluating potential annual giving and major gifts goals and corresponding strategies for our staff to engage our constituents and reach those goals.

- Campus Open House

As recommended by the University-Wide Taskforce on Student Engagement, we will work collaboratively with the division of General Counsel and Governmental Relations and the Office of Student Leadership and Activities to continue planning a campus open house activity for community members. As suggested previously, we believe this event could expand on the current, successful spring event, Ferris Fest. We propose a model that would include

- Demonstrations/workshops or exploratory opportunities hosted in/by every college, athletics and selected campus departments from 10 a.m. to 4 p.m.
- A concert and activities on the quad from 2 p.m. – 6 p.m., with a major act performing at 4 p.m.
- We would invite our regional alumni population as well as advertise to all community members to participate, especially marketing to families. Guests arriving will receive a program outlining the activities for the day.

This would be a true opportunity to showcase all of Ferris while demonstrating our interest in serving the community as a greater resource.

- Conduct New/Ongoing Events

- Presidential Bus Tour (ongoing & new) – 17 visits in four days (June 5-8). Continuing our focus on our community college partnerships, industry/business visits and alumni luncheons and dinners.
- Traverse City Cherry Festival Outings (ongoing & new) – Last year we conducted a very successful dinner program (175 participants) corresponding with the final evening/fireworks of the National Cherry Festival. This year we will add a golf outing the day before hosting our dinner activity. Our hope is to attract another 100 or more alumni participants from the area, who may or may not be able or interested in dinner/fireworks.
- Out of State Functions (ongoing & new) – Last year we conducted successful programs in Denver, CO, Phoenix/Scottsdale, AZ, Orlando and Sarasota, FL. We will continue with events in Arizona and Florida, potentially adding receptions in other communities where concentrations of alumni reside. We will also collaborate with the Athletic Department to consider planning alumni receptions in conjunction with our hockey, football and basketball teams' out of state schedules.

- Continue Planning the Construction of the Alumni Welcome Center



A concept report detailing plans for an Alumni Welcome Center was submitted to President Eisler and VP Duffett for greater discussion this past summer. Highlights included exceptional reception/event spaces, quality meeting spaces for the Ferris Foundation and Alumni Association Board of Directors, workspace to accommodate all of alumni and advancement staff including an anticipated personnel growth of 25%, and a calling center allowing for our annual fund telemarketing to be conducted on our campus using our own students and staff to facilitate the calling.

- Launch the Endowed Scholarship Online Awarding System

This program, which we delayed last year because of our campus-wide transition to Banner, will help us empower all campus members responsible for awarding endowed scholarships to do so in a well informed, timely and efficient manner. If successful, we hope to apply the same model to annually fund scholarships in the near future.



2006-2007 Unit Action Plan

Division:

University Advancement and Marketing

College/Unit: Marketing and Communications

Department: Marketing and Communications

Significant Areas of Success:

Working Together/Engaged Campus

Marketing

- Collaborated with Admissions to produce recruiting materials that contributed to enrollment growth over the past six years, including record high summer, fall and spring enrollments.
- Produced first advancement video featuring donors, scholarship recipients and faculty used as a cultivation tool at the Foundation Benefit and shown during donor visits nationwide.
- Created first alumni video shown at alumni events nationwide to promote interest and involvement in the Ferris State University Alumni Association and to help fundraising efforts.
- Remained in the forefront of electronic recruiting communications with the addition of “Week in Pictures,” videos and the distribution of a mini-CD linking 30,000 prospective students to our recruitment Web sites.
- Responded to planning recommendation for integrated marketing program by developing, educating and assisting the University community with new graphic identity standards and guidelines to more effectively communicate the strengths of Ferris State University and to create more consistency in how we present the University to our audiences.
- Launched a coordinated, statewide marketing campaign to create greater visibility for Ferris State University through public and commercial radio, transit, outdoor, newspaper/magazine and Internet advertising.
- Collaborated with Athletics Advancement to improve the design and content of fundraising and promotional materials.



- Improved the production process for advancement and alumni marketing communications leading to the development of the first fundraising direct mail piece that targeted alumni by college.
- Improved communication between University Advancement & Marketing, the Purchasing Department and Licensing Resource Group leading to a 15 percent increase in revenue from the sale of products with licensed Ferris logos and ensuring the integrity and quality production of Ferris licensed products by licensed vendors.

News Services

Working Together/Engaged Campus

- Responded to *FYI* survey results by improving the newsletter's overall design and content through the addition of more photos, want ads and new employees.
- Continued to improve operations and processes through the addition of student help and the development of news distribution and media inquiry logs to track stories completed/placed and how many media requests were met.
- Generated positive media coverage of University initiatives such as new Transfer Student and Military Veterans scholarships, Instructional Resource Center renovation, Jim Crow Museum traveling exhibit and fundraising campaign, Hurricane Katrina relief efforts and record enrollments.
- Focused on relationship-building with media through phone calls, e-mail, personal visits, informal pitches and timely response to information requests.
- Strengthened crisis communications expertise through participation in Emergency Management Team meetings and exercises.

Web Content

Working Together/Engaged Campus

- Redesigned the Ferris Web site to align with graphic standards and improve navigation.
- Created an all-inclusive campus calendar that is highly visible on the Ferris homepage.
- Improved the searchability of Ferris and its academic programs on the Google search engine.
- Developed user-friendly Web Content Management system for college Web pages.



Ongoing or proposed significant activities:

Marketing

Working Together/Engaged Campus

- Continue comprehensive statewide marketing campaign to increase awareness of Ferris State University through a variety of advertising mediums and coordination with other University marketing entities.
- Continue to educate the University community about new graphic standards and identity system through ongoing meetings, the *FYI* faculty/staff newsletter, University-Wide Notices, Graphic Standards Web site, Summer University workshops, new employee orientation and Convocation; establish an internal recognition/reward program for “best marketing practices”; and conduct an annual audit of University communications to monitor progress toward strengthening identity.
- Utilize marketing consultants Pace & Partners of Lansing to conduct a telephone survey of 900 Ferris State University constituents in Grand Rapids, Lansing and Detroit to determine attitudes and general awareness of Ferris – the data from which will be used to determine the future success of Ferris’ marketing program.
- Conduct more cold student prospect market research by visiting high school feeder and non-feeder schools to test messaging and design concepts of existing and new recruitment materials to determine more effective means of reaching target audience and contributing to enrollment growth.
- Support a planning task force recommendation to improve transfer student admissions by acquiring funding for newspaper, outdoor and radio advertising and improved marketing communication materials.
- Respond to increasing competition for prospective students and flat enrollment predictions by acquiring funding to create additional student recruitment materials that are targeted to high school sophomores, high school seniors and prospective students’ parents.
- Develop and implement marketing campaign for planned giving program and other advancement initiatives.
- Support advancement and alumni cultivation activities and student recruitment by acquiring funding to produce two additional advancement videos and a recruitment video for 2006-2007; to provide ongoing support for special event video requests; and to establish a materials and overtime budget to support existing staff and freelance staff needs.



- Address funding challenges associated with the production of *Crimson & Gold* alumni magazine that include declining base budget support and an increase in paper, postage, mailing, freelance graphic design and travel costs.
- Collaborate with the Alumni office to coordinate the work of the Advancement communications specialist (new position recommended) with the existing communications specialist in Marketing and Communications to ensure operational efficiency and effectiveness.
- Seek permanent funding to support a part-time adult (graphic designer) for summers – a position which has proven to be successful in assisting the full-time graphic designer in meeting an increasing number of marketing communication projects that have been difficult to complete by student employees who aren't as readily available in the summer.
- Collaborate with Athletics to acquire permanent funding for a continuing part-time adult photographer who can contribute to a significant increase in the coverage of many University events, particularly weekend and evening athletic activities, and provide maintenance of a comprehensive cataloging and archiving system for photos. This additional support in the past has allowed the full-time University photographer to more effectively focus on supporting recruitment, advancement, alumni and University-wide photo needs.
- Enhance the preservation of Ferris State University history by acquiring adequate computer hardware that will store thousands of Ferris photographs and enable the University community to utilize a software search system to easily find photos for their publication or other needs.

News Services

- Review and improve existing Crisis Communication plan to clarify roles, responsibilities and processes; to identify available resources; and to anticipate and prepare for crisis scenarios, such as inclement weather communication protocol.
- Collaborate with Academic Affairs and Web Content staff to develop a Web-based faculty experts guide for responding to media inquiries, recognizing faculty achievements and educating campus about breadth of faculty experience.
- Continue to evaluate the effectiveness, value and priority of the *FYI* faculty/staff newsletter in overall publicity plan.
- Continue to educate the University community about News Services and improve collaboration with departments to identify attained grants that can be publicized as well as other potential news and feature stories that have regional, statewide and national impact.



- Schedule personal visits with print, radio and television media in northern Michigan, Grand Rapids, Lansing, Detroit and other areas of the state where Ferris needs to increase visibility.
- Continue to improve News Services processes, measures of success and student staffing levels.
- Place greater emphasis on pitching Ferris' position on "hot topics" in higher education and in identifying trade/specialty publications to place stories about Ferris' signature programs such as Rubber Technology and Plastics Engineering.

Web Content

Working Together/Engaged Campus

- Encourage administrative offices on campus to migrate internal Web content and processes from the main Web site (ferris.edu) to the Banner system. Also encourage Admissions, Honors, Career Quest and other areas on campus that are registering students and prospects through the main Web site to migrate their processes to the Banner system.
- Assign the web technical manager in Information Services & Technology to Marketing and Communications to meet increasing pressures to provide technical support to user groups on campus and freeing up the web content manager to focus on his key responsibilities. By working together, this two-member Web team will be better able to provide desktop support and training to users who are authoring their own pages; to ensure that Web pages across divisions are kept current and adhere to graphic standards; and to establish a tracking system that can measure the effectiveness, traffic and usage patterns for ferris.edu and its dozens of sub-domains.
- Work with consultants Peak Positions of Traverse City to develop a tracking system to measure Web site visits and demographics and on taking the internal Google search feature to the highest level (newest version) possible.
- Continue to evaluate the effectiveness of the Ferris Web site by hiring an external consultant to review the content, design and navigation of the top level pages of ferris.edu and make recommendations for improvement. The consultant could also evaluate our network infrastructure as it relates to the delivery of Web content to the Internet. Seek further feedback from user groups by conducting focus groups with Ferris e-marketing and visual design students and high school students.