



2008-2009 Unit Action Plan

Division: University Advancement and Marketing

College/Unit: _____

Department: Advancement

Significant Areas of Success:

- Developed a comprehensive constituent based/regional based fundraising program covering all colleges on campus as well as 11 defined regions through the addition of 5 major gift staff within COE, COB, COAHS, COAS, FSU-GR, and replaced Athletics, COT, and Planned Giving due to staff turnover. Revised KCAD Major Gift Position to build current infrastructure and manage gift documentation procedures.
- Upgraded Research Assistant position in order to expand the capacity of the prospect management program. Significantly enhanced prospect management strategy and developed top 100 prospect list under the direction of the Assistant Director of Prospect Research and Relationship Management.
- Hired new Stewardship Coordinator and fully developed stewardship position working with financial aid and departments on campus. Hosted donors in the President's suite in Football and Hockey through newly developed stewardship plan guidelines.
- Engaged planned giving prospects through new planned giving marketing strategy.
- Developed comprehensive major gift training with major gift and administrative assistant staff. Initiated 40+ hours of initial training covering the identification, cultivation, solicitation and stewardship process. Combined initial training with 50+ hours of follow up training.
- Launched off site training at CASE Conference for 10 major gift and 4 administrative staff emphasizing skill and team building.
- Established a formal mentoring program for all new UA&M employees with a three-month mentor/mentee relationship.
- Established goals and objectives for individual collegiate areas.
- Completed 185 personal visits to date.
- Increased major/planned gifts by 119% to \$1,751,247.



- The Ferris Foundation raised \$54,000 to support the Faculty/Staff Merit Grant program and the Foundation for Excellence Merit and Need Based Upperclassman Scholarships Endowment. The total gift value of the endowment is \$271,941 with a market value of \$387,785. All proposal submissions and committee review for the Faculty/Staff Merit Grant Program has gone electronic. The Ferris Foundation supported numerous program enhancements within UA&M.
- Submitted 5 proposals for the Jim Crow Museum Expansion project.
- Completed Naming Opportunities Revision process and submitted to the President for approval.
- Recruited and hired a diverse major gift officer team.



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Ongoing or Proposed Significant Activities:

- Develop a strategy to engage in a comprehensive capital campaign. Engage in internal readiness audit.
- Increase corporate and foundation philanthropic support through the hiring of a fully-trained Corporate and Foundation Relations Major Gift Officer.
- Fund full-time stewardship coordinator. Significant groundwork has been established and moving forward to support current operations and campaign activity is necessary.
- Increase number of support staff from 4 to 5 for major gift officers.
- Implement ongoing staff professional development program within Major Gifts including in- house and external opportunities as well as campaign training.
- Monitor and assess performance measures of major gift team through the completion of 2008 contacts.
- Increase major gift closure rates by individual.
- Seek closure of the Jim Crow Museum expansion project.
- Initiate communication strategy with Academic Deans to partner in planning for the upcoming comprehensive campaign.
- Develop a training strategy to increase Major Gift Officer knowledge in the key areas of prospect identification, solicitation and planned giving vehicles.
- Support the efforts of the Alumni Relations Office to identify and enhance major gift opportunities for diverse populations.



2008-2009 Unit Action Plan

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College/Unit: _____

Department: Alumni Relations and Advancement Operations

Significant Areas of Success:

- The FSU Alumni Association conducted more than 20 events which engaged 3,500+ alumni and friends in Michigan, Florida, Arizona and Illinois. These successes were highlighted by record turnout, 230+, for our 50th Annual Spring Reunion and a new partnership with Buffalo Wild Wings – owners/alumni Jeff and Brian Carmody to sponsor our FSU vs. GVSU tailgater which engaged 350+ alumni/friends.
- Worked collaboratively with FSU Athletics, Marketing/Communications and various members of the Big Rapids community to host alumnus Chris Kunitz and the Stanley Cup. The morning breakfast engaged 300+ and the arena rally engaged 1,600+, and significant media coverage was garnered for FSU.
- Assisted The Ferris Foundation with facilitating the 9th Annual Foundation for Excellence Benefit noting a 12% attendance increase to 530 guests and a 70% sponsorship increase to \$160,000+.
- Implemented a new platform for the Alumni Association Online Community Web site, www.ferrisalumni.org.
- Student Alumni Gold Club assumed responsibility for managing the Bulldog Mascot, including recruiting/hiring the students as mascot, marketing the Bulldog both on and off-campus and facilitating/supervising the Bulldog's appearances on-site.
- Overall cash gifts to Ferris have increased 1% as of 12/31/07, to \$2,588,286.
- The number of donors giving to Ferris has increased 15% as of 12/31/07, to 4,110.
- Alumni giving to Ferris through our fall direct mail appeal and online have increased 57% to \$91,962, and the number of alumni giving has increased 134% to 882.
- Alumni giving to Ferris via our telemarketing efforts in spring 2007 increased 47% to \$66,000 from spring 2006, and the number of alumni pledging increased 38% to 1,371, of which we fulfilled 102% of these pledges.
- Improved multiple operations, most notably reducing the number of steps necessary to create the quarterly financial reports for the Trustee and Foundation Board (17 reports to 7), and the graduate roll-over process with new software, reducing timeline to conduct this process by 3 weeks. This allows us the opportunity to start communicating with alumni about upcoming programs, annual fund materials much more quickly.



- Improved home/primary contact data in the Millennium system to an 89.02% accuracy. This is significant considering we made 20,779 address updates and an additional 114,289 updates noting changes in phone/cell phone, e-mail, employment, participation with alumni/advancement activities, gifts to FSU and other relationships to FSU.
- AlumniFinder Data Cleansing Project for The Ferris Foundation – Phase II
 - Target Data: 45,000 records consisting of:
 - 1) Graduates Only Prior to 1959 & 1990 - Current
 - 2) Excluded KCAD grads
 - 3) Excluded current prospects and donor society members
 - Batch “Scrubs”:
 - 1) Update contact data address, phone and death notices
 - 2) E-mail Append
 - 3) Wealth Scoring
 - 4) Work Location
 - Results:
 - 12,581 Address updates
 - 9,674 Phone # updates
 - 170 Death notices
 - 2,258 E-mail address updates
 - 8,000 (top 25%) Wealth Score updates
 - 14,671 Work Location updates



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Department: Alumni Relations and Advancement Operations

Ongoing or Proposed Significant Activities:

- **S&E Funding for Annual Giving Operations**

Continue and increase one-time funding additions for annual fund direct mail solicitations and telemarketing. With the additional one-time support granted last year, we were able to produce a 309% return on investment (ROI) for fall 2007 (\$29,768 returning \$91,962) and experienced 162% ROI on telemarketing for FY07 (\$80,000 returning \$130,000). With additional support, we intend to implement a personal solicitation program conducted by the director to help advance selected annual fund donors giving at \$250 or higher to increase their level of giving and better secure those commitments by encouraging multi-year pledges. We also intend to expand further our direct mail solicitations and telemarketing strategy. We will expand our daily data updates to include the Correct Call/Correct Zip/Obituary Service available through Sage Software/Millennium. And we must send our data management staff to additional, advanced training for Millennium and Crystal Reporting.

- **S&E for New Alumni Events**

Continue and increase one-time funding additions for new alumni events. With the additional one-time support granted last year, we were able to add the FSU vs. GVSU Tailgater, events in Tampa and Miami, Florida, Anaheim/LA area, California and Denver, Colorado – all areas with significant pockets of alumni/emeriti and friends. With additional support we hope to continue these events and others as well as make several programming additions to homecoming for alumni in fall 2008.

- **Alumni/Donor Constituent Marketing Research**

Continue one-time funding addition to conduct market research with alumni and donor base. With the additional one-time support granted last year, we were able to examine donor and non-engaged alumni perceptions of The Ferris Foundation and other fundraising materials, established a baseline annual fund analysis for direct mail and conducted a survey regarding homecoming programming. With continuing one-time support, we intend to engage a vendor to assist us with more specific analysis of our annual fund donor trends in order to increase retention and consecutive giving of our current donor base and increase overall response to our mailings/telemarketing efforts.



- **Online Community Web site**

Continue one-time funding to support the Alumni Online Community Web site. With the additional one-time support granted last year, we were able to completely overhaul the site, which currently engages more than 25,000 registered users, to better their expectations for online interaction with fellow alumni and FSU alumni programming and services. Work must continue this year to complete the overhaul and to conduct extensive marketing to alumni of the many new/enhanced services the site can offer/do for them to maximize the sites value for FSU and the FSU Alumni Association.
- **Matching Contributions Data Analysis**

We will engage a vendor that will “scrub” our alumni records to find those who currently work for or are retired from companies who match employee charitable contributions. With this data, we will specifically and specially solicit these alumni to both support FSU but also help them match that gift from their employer, either providing them with the forms or when using e-mail, the matching gift form link – doubling the financial impact the donor makes for Ferris. FY06 & FY07 we received an average of 100 matching donations valued at approximately \$20,000 annually, and FYTD 08, we have received 41 valued at \$8,500. Our goal is to increase this significantly.
- **Information Support Specialist (Upgrade to Full-time Continuing from Full-time Temporary)**

This position services the majority (61% or 70,000 updates) of data entry into the Millennium system. This position has also begun to relieve the workload of data reports requested from Millennium which have increased 30+% in recent years with the addition of advancement staff. The need for this position to make an impact on both these areas of data management continues to grow and remains critical to our success.
- **Goal for Cash Gifts Received in FY09**

Report total cash gifts received by Ferris of \$5,000,000 in FY09 (excluding in-kind gifts). This represents an increase 11% increase from our FY08 goal (\$4,500,000).
- **Coordinator of Parent Relations and Parents’ Fund (New Full-time Temporary 2-year)**

This position would be responsible for coordinating parent data into the Millennium system, organizing a Ferris Parents’ Advisory Board, conducting one parent/family related program on-campus each semester (fall/spring only) and conducting one direct mail solicitation to parents each semester.
- **Front Desk Supervisor (Part-time Continuing)**

Provide consistent, steady and professional presence at UA&M reception area. Provide clerical support for all Alumni and Advancement Operations administrative assistants. Supervise student employees.



- **Alumni Relations Event Coordinator (Full-time Temporary)**

This position would be responsible for working with alumni and our staff to plan and coordinate logistics for new alumni activities both on-campus and regionally. This is necessary with the expansion/demand for alumni programming regionally/out-of-state and to meet programming needs for expanding larger University venues that include homecoming and college/programmatic partnerships.



2008-2009 Unit Action Plan

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College/Unit: _____

Department: Marketing and Communications

Significant Areas of Success:

Marketing

- Built awareness of Ferris State University through increased exposure on billboards, public and commercial radio, print advertising, sponsorships and parade participation.
- Produced far-reaching, award-winning personalized student recruitment “search” piece and other one-of-a-kind recruitment materials that have positively impacted enrollment growth.
- Created well-received new print communications for prospective students and their parents.
- Developed high quality, targeted alumni and advancement publications that have contributed to private giving successes.
- Formed team of graphic designers from across the University to help strengthen graphic identify of Ferris State University.
- Identified a UA&M Diversity Committee to respond to University-wide initiatives.
- Collaborated with Admissions to ensure success of new Chicago student recruitment initiative and recommendations made by the President’s Blue Ribbon Task Force on Enrollment.
- Utilized in-house staff expertise to produce commercial quality video for The Ferris Foundation Benefit.
- Partnered with Ferris-Grand Rapids to provide photography support for advertising campaign and Kendall College of Art and Design for their award-winning viewbook.
- Expanded media distribution of “Ferris Sports Update” athletics coaches program to include more than one million Comcast Local viewers.
- Led the marketing and public relations activities for the 2008 Festival of the Arts.



Web Content

- Added a scrolling *Ferris Update* box for promoting current events.
- Upgraded and expanded the Content Management System for academic colleges, their programs and departments. The upgrade includes the capability to add multimedia content.
- Secured a temporary full-time Web Developer position to support the academic colleges, content management systems, Web page tracking, multimedia development and numerous other tasks.
- Partnered with Television and Digital Media Production to publish multimedia content on the Ferris home page that showcases student life and academic programs. In addition, a multimedia-driven Future Students site was created to give prospective students a real slice-of-life experience.
- Through cross-divisional funding from Student Affairs, continued search optimization efforts with Peak Positions to keep Ferris State's rankings high on the keyword search results for Google and major search engines.
- Added "Lift-Mobile" interface that allows users of handheld devices to receive a customized, text-view of Ferris Web pages. A text-only version of the entire Ferris Web site was continued for the visually impaired who use special text-reading software.
- Created a Festival of the Arts Web site that ties the University and the Big Rapids community together in a common initiative.
- Added tracking and analytical capability for Web pages through Google Analytics software.
- Continued successful home page elements (wheel, calendar, videos).
- Worked with Marketing and Advancement colleagues to launch official Ferris institutional Web site on the social networking sites Facebook and YouTube.
- Formed the Web Work Group which will develop a strategic plan to guide the future of Web development at Ferris State University, including directives for the placement of content for internal and external audiences on major Web pages under the FERRIS.EDU domain.
- Implemented RSS feed for Campus News and created a Sports Ticker on the Athletics home page to promote current events.
- Created multimedia e-mail messages for Alumni and Advancement.

News Services

- Collaborated with Academic Affairs and the College of Technology to arrange appearances for the national championship-winning Rube Goldberg team on the "Today Show" in New York City and "Jimmy Kimmel Live" in Los Angeles.



- Partnered with Alumni Relations and Athletics to coordinate statewide media coverage for Chris Kunitz' visit to Ferris State University with the Stanley Cup.
- Generated positive news coverage of University initiatives such as record enrollments, the Information Security and Intelligence degree and the contingency fee refund.
- Created the new *Points of Pride* quarterly print publication to celebrate the accomplishments of faculty, staff and students.
- Improved crisis communications by streamlining policies and procedures through participation on the Information Technology Communications Task Force.



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Department: Marketing and Communications

Ongoing or Proposed Significant Activities:

Marketing

- Continue to build the Ferris State University brand through a statewide marketing campaign.
- Collaborate cross-divisionally to develop an integrated marketing and recruitment plan based on the University's mission, vision and strategic plan.
- Continue partnering with Enrollment Services/Admissions to support ongoing/new student recruitment initiatives; to stay on the cutting edge of student recruitment; and to streamline student recruitment materials production processes.
- Encourage continued participation by University colleagues in integrated processes that coordinate the marketing work of the institution.
- Lead ongoing market research program to assess identity in the marketplace, query prospects and other stakeholders, test messages and measure progress against marketing goals.
- Engage in campaign communications readiness planning.
- Partner with Academic Affairs, College of Arts and Sciences' Department of Humanities, Study Abroad, Admissions and Television and Digital Media Production to produce a video and other student recruitment and marketing materials for the 2008 study abroad trip to Greece and Italy.
- Seek continuing base budget support for increasing printing and postage costs associated with the production of the *Crimson & Gold* alumni magazine.
- Retain external marketing agency to assist with statewide branding initiatives.
- Fund existing part-time Photographer to provide optimal level of photographic service support to University community.
- Fund new full-time Graphic Designer to meet growing divisional needs, particularly in Advancement with the addition of fund-raising staff and as part of a campaign readiness plan; and to more effectively serve other University clients who request high quality, integrated marketing communications.



- In collaboration with the College of Technology and Office of the Vice President for Academic Affairs, jointly fund new Marketing Specialist position to support marketing and public relations needs of the College of Technology. The placement of a marketer in COT will follow the model now used by the colleges and UA&M for major gift officers and will serve as a “pilot,” with its expansion to other colleges dependent upon successful outcomes.
- Continue collaboration with Athletics and Television and Digital Media Production to ensure continuous quality improvement of “Ferris Sports Update” and to identify more permanent funding and media distribution solutions.

Web Content

- Continue using upgraded and expanded Content Management Systems to re-design and improve the usability and appearance of college Web sites and other key areas.
- Coordinate training of staff across campus in the use of Dreamweaver with the Web Systems Administrator.
- Work with marketing personnel and Admissions to develop a new Virtual Tour.
- Submit a draft of a strategic plan for the Ferris Web site to the administration by the end of the Spring 2008 semester.
- Work with marketing and news to develop Web and print templates for *Points of Pride* and *C&G*.
- Develop a new site for archiving online videos in cooperation with Television and Digital Media Production.
- Renew outsourced contracts with Lift-Text and Lift-Mobile.
- Renew license for Google Mini search appliance and research and budget for any possible upgrades to the system.
- Serve as a resource to Academic Affairs for 2011 Accreditation (Data Committee).
- Continue to publish successful home page elements (wheel, calendar, videos).
- Offer Web page tracking as requested with Google Analytics software.
- Expand the Ferris presence on the social networking sites such as Facebook and YouTube.
- Support requests for multimedia content for Alumni and Advancement, including customized e-mails and the Foundation Benefit video.
- Continue to offer Web authoring and Web editing support across campus divisions and employ an enhanced Web Creator content management system where possible.
- Assist the News area with RSS feeds.
- Train decentralized users in the use of Content Management Systems and monitor accounts.
- Assume authoring control of Flash e-mail messages for Admissions to send to prospective students.



- Retain search optimization consultant to keep Ferris State University's rankings high in the keyword search results for Google and major search engines and to identify programs to target that are in need of increased enrollments.
- Fund existing full-time Web Developer and part-time Web Designer in order to continue to effectively maintain and improve Ferris' Web site.
- Increase Web Content base budget to support the equipment and professional development training needs of existing and new staff.
- Engage in discussions with Student Affairs, Media Production Services and Television and Digital Media Production to determine how University videography needs for student recruitment and other uses can be most effectively met with existing and/or new resources.
- Collaborate with University Archives and Record Management Program staff to obtain hardware to store and protect Ferris State University's photo history.

News Services

- Continue to improve crisis communications by supporting the recommendations of the Information Technology Communications Task Force and by participating in Emergency Response Team and other crisis communications training and seminars.
- Utilize University-Wide Notices to promote *Ferris in the News*, which mentions Ferris State University media placements locally, nationally and internationally.
- Develop *FYI Online* into the campus' primary resource for current news and events about Ferris State University faculty, staff and students.
- Streamline the News Services beat system by creating the Editorial Priorities Committee, a collaborative team of Marketing and Communications staff charged with cultivating and expanding cross-divisional relationships to identify stories that raise the awareness and academic reputation of Ferris State University.
- Expand internal and external communication methods by exploring best practices in the delivery of university news.

Unit-wide

- Implement UA&M Diversity Committee recommendations and partner with other divisions to achieve diversity initiatives that require marketing and communications support.
- Provide sufficient opportunities for staff professional development and cross-divisional training activities.
- Continue participation in divisional new staff mentoring program and also identify means for ensuring the success and ongoing professional growth of current employees.