



2007-2008 Unit Action Plan

Division: University Advancement and Marketing

College/Unit: University Advancement and Marketing

Department: Advancement

Significant Areas of Success:

We must work together and become an engaged campus.

- Initiated procedural manuals for prospect research and planned giving that are available on the UA&M shared drive.
- Developed major gift policies and procedures which will be available on the UA&M web site by the end of the fiscal year.
- Sent staff to 24 conference and workshops during 2006-2007. Trained major gift officers and administrative support staff to advance their knowledge base in areas such as capital campaigns, solicitations, engaging deans and board members in fundraising, advancement management and teamwork, development research, planned giving, and managing change. Professional development seminars were both internal and external.
- Initiated quota system to engage major gift officers at a more significant level and formalized the solicitation training and process to support the major gift team. All full time advancement officers will complete 30 annual solicitations and manage a 25% closure rate (industry standard).
- Completed a total of 491 personal visits to date.
- Raised \$818,824 in major gifts to date.
- Began manually tracking gift solicitations and closes for the first time in advancement history.
- Worked with the Ferris Foundation Board of Directors to learn how to manage the campaign process through two mini-campaign projects. The Jim Crow Museum campaign raised \$83,596 and encouraged new leadership both at the University and Foundation board level. The need-based scholarship campaign brought in \$409,775 and allowed a number of new donors to be engaged with the University. 50% of the gifts were personal commitments from the Ferris Foundation Board of Directors.
- Streamlined the Ferris Foundation Faculty/Staff Merit Grant program with enhanced marketing efforts resulting in a 65% increase in applications. Increased the maximum grant award from \$5,000 to \$7,500.



- Began visiting regional donors in the Florida and Arizona regions through major gift attendance at alumni events and personal visits with donors. The experience taught major gift officers to manage a prospect load in a specific region and to monitor return gifts as follow-up from regional travel.
- Defined official donor assignment strategy placing donors with primary managers based on staff role. For example, President Eisler should be placed in front of any donor with \$1 million or more capacity.
- Utilized data transfer from the Kendall College of Art and Design software to the Millennium system with training provided by advancement services.
- Supported and hosted the President's "Commission for the Future." The 77 member blue-ribbon task force was comprised of key decision-makers and individuals of influence who have distinguished themselves by their accomplishments and their community service. The group met on November 3, 2006, to engage in dialogue that will assist the University in advancing its vision for greater leadership and service in the coming decades. Commission for the Future representatives participated in the Ferris Foundation Gala that evening.
- Supported, with the leadership of the Athletics Department, the Athletic Hall of Fame. Nine new members were inducted bringing the total to 74. All participants have been assigned to the President or a major gift officer.
- Hosted 180 guests at the 4th Annual Michigan Construction Hall of Fame with a 45% increase in attendance and a 300% increase in sponsorship funding.
- Launched a volunteer donor-driven departmental annual fund within the College of Technology.
- Implemented procedures for the President's Box/Suite for football and hockey games. The procedures were developed to expand the scope of invitations and to increase attendance. At these venues, the President and major gift staff hosted 791 attendees.
- Assisted in completion of documentation on scholarship and endowment reporting process including gift closure, financial aid, application, awarding, and stewardship process. This document was submitted to President Eisler's Scholarship Task Force to assist them in establishing recommendations to ensure that scholarships are awarded effectively, marketed in a more comprehensive manner, and that donors are properly acknowledged by the scholarship recipients and the University.
- Established a football scholarship campaign with \$100,000 committed to date.
- Organized the track and field and cross country alumni reunion to be held in May 2007.
- Increased, with the support of the Ferris Foundation Board of Directors, the campus community, and Alumni Relations, the number of attendees (473 guests) at the Foundation for Excellence Gala realizing an increase of 18%.
- Worked with the Advancement Administrative Assistant Team to develop a mailroom and storage structure that created a better workflow that benefited the entire division.
- Initiated a University Advancement educational component into Summer University 2006.



Ongoing or Proposed Significant Activities:

We must work together and become an engaged campus.

- Continue to establish policies and procedures for MGO's to include capacity ratings for major gift prospects and their affinity for giving.
 - Maintain on-going professional development for the entire Advancement team.
 - Continue to monitor and assess performance expectations. Every MGO will be required to document 175 face-to-face visits during FY07-08.
 - Initiate a 33% solicitation closure rate in 2008-2009.
 - Establish a program that includes assigning advancement to specific regions in association with their primary constituency in order to more effectively manage the pool of major gift prospects.
 - Work with the President, Vice President for University Advancement and Marketing and The Ferris Foundation to plan and prepare for the capital campaign. Commit to the outcomes from the university's strategic plans and conduct feasibility study to clarify goals, timeframe and budget for the campaign.
 - Review and assess the prospect management report, rating codes, and contact reports. Tracking solicitations and closes, along with coding top 20 prospects will be on-going.
 - Formalize and offer training to departments and colleges for "Fundraising 101" at Ferris State University and Kendall College of Art and Design.
 - Create a manual on how to effectively support major gift officers.
 - Utilize Millennium in a more comprehensive manner through the advancement office to become more proactive in the methods to extract and track information.
 - Continue to provide and facilitate opportunities for the Jim Crow Museum through individual and foundation support.
 - Continue internal audit and readiness plan in preparation for the capital campaign.
1. Fund two full-time major gift officers. With 25,000 major gift prospects and 16,000 planned gift opportunities, the hiring of additional staff that can carry out the essential duties in each of these areas is essential. Duties will involve raising major gifts for campus constituencies that currently do not have a major gift officer.
 2. Fund full-time event and stewardship coordinator. Responsibility for facilitating advancement events to include Athletic Hall of Fame, Construction Hall of Fame, Ferris Foundation Benefit and a multitude of smaller donor driven specialty gatherings. In coordination with the scholarship office, ensure that donor stewardship is in place to facilitate proper acknowledgement from the scholarship recipients and donors.
 3. Hire full-time temporary administrative assistant to support the two additional major gift officers.



4. Expand S & E for additional members of the major gift officer team to include full-time temporary administrative assistant, 2 major gift officers, and event and stewardship coordinator.
5. Upgrade administrative assistant to prospect research assistant. Industry standards show a model that allocates a full-time person to research donor information and a full-time person to work on prospect management.



2007-2008 Unit Action Plan

Division: University Advancement and Marketing

College/Unit: University Advancement and Marketing

Department: Alumni Relations, Annual Giving and Advancement Services

Significant Areas of Success:

We must work together and become an engaged campus.

Alumni Relations:

- Hosted 14 major alumni events, engaging more than 1,700 participants.
- Partnered with other campus departments/colleges to support 20 other alumni activities which engaged more than 2,300 participants.
- Facilitated, with the Office of President, the 2006 Presidential Bus Tour which engaged more than 500 partners and alumni/friends participants at 15 locations statewide. We also facilitated the Presidential Alumni Caucus receptions, engaging 90 alumni in smaller focus group sessions at 5 locations statewide.
- Engaged more than 7,000 new registered users with the site in calendar year 2006. This is an increase of 483% (1,200 new users) from calendar year 2005. The site also facilitated 552 alumni to find one another, an increase of 121% (250 alumni finds) last calendar year. We increased our broadcast e-mails to alumni 54%, including the monthly Bulldog Bytes e-newsletters, two annual fund appeals, several dozen announcements and reminders.
- Assisted the Ferris Foundation in facilitating the most attended (473 guests or 18% increase) Ferris Foundation for Excellence Benefit.

Annual Giving:

- Increase of overall cash gifts to Ferris totaling \$3,152,049 as of 3/2/07. This is an increase of 24% as compared to FY06.
- Increase of in-kind gifts to Ferris totaling \$3,839,781 as of 3/2/07. This is an increase of 310% as compared to FY06.
- Support from our alumni (graduates and non-graduate attendees) has increased, totaling \$928,115. This is an increase of 55% as compared to FY06.
- Fall telemarketing realized 1,571 pledges or an increase of 13%, totaling \$91,122 or an increase of 27% as compared to fall telemarketing results for the previous fall. As of 3/2/07, 1,362 of these pledges were fulfilled totaling \$88,911 or 97%.



Advancement Services:

- Launched the endowed scholarships online awarding system.
- Improved accuracy for primary contact data in the Millennium system by 6.13% to 88.01%. This is significant considering that we made 54,477 address additions or updates and made another 128,594 record updates noting changes in employment, participation with alumni/advancement activities, gifts, written/email/phone correspondence and other relationships with FSU.
- Alumni Finder Project for The Ferris Foundation
 - Target Data: Graduates 1959-1989
60,523 alumni
 - Batch “Scrubs”:
 - 1) Update contact data address, phone, death info., etc.
 - 2) E-mail Append
 - 3) Wealth Scoring
 - 4) Work Location
 - Results:
 - 567 address updates
 - 236 deceased updates
 - 8,275 e-mail addresses
 - 17,000 wealth score updates
 - 24,314 work location updates

Ongoing or Proposed Significant Activities:

We must work together and become an engaged campus.

- S&E funding for Annual Giving operations
 1. Immediately expand our user seat license for the Millennium system adding ten users to accommodate the growing numbers of advancement staff, support staff and other campus personnel using the system.
 2. Increase S&E for annual fund telemarketing. Our current vendor and investment have produced a total 210% return (\$38k returning \$80k) in fall FY06 and returned 240% return (\$38k returning \$91k) this fall FY 07.
 3. Increase S&E for alumni relations and annual fund to accommodate significant increases in our overall alumni and friend constituency base, as well as postage, travel and entertainment costs to solicit via direct mail and conduct quality, successful alumni programming.



- Current Part Time Data Entry Position – upgrade to full-time
 1. Current database administrator workload for production of basic data reports (mailings, constituency analysis, etc.) has increased 30% in just this last year, with no back-up person to fill this role.
 2. Data entry tasks necessary to keep Millennium as current and relevant as possible continues to increase exponentially.

- Goal for Cash Gifts Received in FY08

Raise total cash gifts of \$4,200,000.00 in FY08 (excluding extraordinary gifts and in-kind gifts). This represents an increase of 5% from our FY07 goal.

- Constituent Marketing Research

In order to effectively and efficiently engage as many of our alumni and friends both programmatically and philanthropically, we must engage in significant market research of these constituencies. Efforts to do this in the past have been sporadic and limited, but the results were put to effective use. Consider that a comprehensive research plan would:

1. Illuminate expectations, interests and message effectiveness amongst our alumni and donor constituents.
 2. Drive more informed decisions and what/where alumni and donor activities should be conducted.
 3. Improve the scope and effectiveness of our print and online materials directed at alumni and donors.
 4. Guide us to make decisions regarding expansion and/or deletion of programs and services promoting our efficiency and accountability.
- Conduct New/Ongoing Alumni Activities

We will conduct numerous activities around Michigan and in selected areas nationwide to efficiently and effectively engage as many of our graduates with their alma mater. Highlights of our agenda include:

1. 5th & 6th annual Grad Fair
2. 51st annual Spring Reunion and Distinguished Alumni Awards Banquet
3. 17th annual Alumni Association Golf Outing
4. Grand Rapids/West Michigan Young Alumni Reception
5. 3rd annual Traverse City Alumni Dinner/Activities w/ Cherry Festival Parade and Fireworks Display
6. 3rd annual Chicago Alumni Reception



7. Homecoming
8. Expand our Florida Alumni/Emeriti activities to four/five regions
9. 3rd annual Phoenix/Scottsdale and 2nd annual Tucson Alumni/Emeriti Receptions

We will also continue to support and/or partner with the growing number of alumni constituent organizations, and FSU programs/colleges who will conduct alumni activities throughout the year.

- New Full-time Position – Advancement Stewardship and Events Coordinator
 1. Coordinate with our Major Gifts staff, the logistics and clerical tasks for all advancement events, i.e., Bulldog Athletic Hall of Fame Dinner, Michigan Construction Hall of Fame Dinner, small group and individual meetings/luncheons/dinners with current/prospective donors.
 2. Work closely with the Office of Student Financial Aid Scholarship Coordinator to ensure all donor-established scholarship aid available for expenditure is utilized (when possible and appropriate).
 3. Conduct scholarship donor stewardship activities including working to connect recipients and donors via appropriate and timely acknowledgement from the students to the donors for their awards, and potentially connecting the students and donors either individually or in group settings, to enhance the long-term relationship of both parties with Ferris.

- Database Cleansing

Continue to utilize an outside vendor, as with the Alumni Finder Project, to have all our alumni and other constituent records analyzed and updated for contact information, employment information, e-mail addresses, wealth score evaluation and other factors. The Alumni Finder Project only reviewed approximately 50% of our alumni data, and 35% of our overall constituent records. Such an investment will dramatically improve efficiency and effectiveness for the entire division.

- Online Community Website Overhaul

Seeking proposals from vendors to dramatically improve our Alumni Association online community website with these primary goals:

1. Update look and feel of site to more closely interact with ferris.edu.
2. Change/add user services to provide more of a “Facebook/MySpace” end user experience.



3. Allow for greater access and control of changes to site design, services and posted information from our staff here at Ferris.
- Continue Planning for Future Construction of the Alumni Welcome Center

A concept report was submitted in FY06. We believe this facility should continue to remain a long-term planning priority. Highlights from the proposal include:

1. Exceptional reception/event spaces.
2. Quality meeting spaces for the Ferris Foundation and Alumni Association boards, and alumni constituent organizations.
3. Office workspace to accommodate all of our current and growing alumni and advancement staff.
4. Calling center for annual fund telemarketing that would be staffed with our own students and personnel to facilitate alumni constituent contacts.



2007-2008 Unit Action Plan

Division: University Advancement and Marketing

College/Unit: University Advancement and Marketing

Department: Marketing and Communications

Significant Areas of Success:

We must work together and become an engaged campus.

Marketing

- Strengthened brand awareness and visibility of Ferris State University through statewide media placements that included a mix of outdoor, print, transit and radio advertising.
- Collaborated with Admissions to produce award-winning recruitment materials that measurably contributed to enrollment growth over the past eight years, including record summer, fall and spring enrollments in 2006-2007.
- Placed greater strategic focus on producing high-quality fund-raising, alumni and reputation-building communications.
- Re-designed the *Crimson & Gold* newsmagazine, enhanced interest in and contributions of information by alumni in the Class Notes section and produced a wider variety of articles, including service information and faculty profiles.

News Services/Media Relations

- Improved crisis communications by clarifying roles, responsibilities and processes for notifying internal and external audiences that classes are cancelled due to inclement weather.
- Enhanced the measurement of media relations activities by retaining news clipping services to better track story placements.
- Expanded awareness of Ferris' ongoing accomplishments by calling more attention to them on the Ferris homepage through improved content and videos about campus activities, people and programs.
- Generated positive news coverage of University initiatives such as record enrollments, the Interdisciplinary Resource Center ground breaking, the Political Engagement Project and Career Quest.



Web/Multi-Media/Photography

- Rebuilt the Ferris homepage to include multimedia content and refreshed copy, an all-inclusive campus calendar and Week in Pictures.
- Improved the internal search function of Ferris and its academic programs through the Google-Mini search appliance.
- Developed user-friendly Web Content Management system for college Web pages and departments.
- Established a consistent work flow and created a cross-divisional model for teamwork and efficiency. College personnel working together with Web Content include Bill Potter (University College), Michelle Johnston (COEHS), Reinhold Hill (Arts & Sciences), Dan deRegnier (Allied Health Sciences), Ron McKean (Technology), Rod Larson (Pharmacy), Amy Buse (Business) and Mark Swan (Optometry).
- Published a revised set of guidelines and institutional policies for the Ferris Web site.

Ongoing or Proposed Significant Activities

We must work together and become an engaged campus.

Marketing

- Collaborate cross-divisionally to update and implement the integrated marketing and recruitment plan.
- Provide needed market research and analysis which is vital in marketing our services and communication products and improves institutional decision-making.
- Continue to orchestrate an inclusive process to articulate the value of sustaining quality external communications through the use of consistent graphics and messaging.
- Create a marketing innovation fund to support entrepreneurial activity in the division and help foster a positive environment.
- Respond to the recruitment potential of reaching more than 100,000 Michigan high school students required to take the ACT college entrance exam by expanding direct mail tactics and other communications outreach to them and their parents.
- Continue the momentum of last year's statewide marketing campaign by retaining outside marketing and creative services to support ongoing advertising initiatives to raise awareness, visibility and loyalty to Ferris and to increase the number of students who enroll at the University.
- Address increasing paper, postage, mailing, freelance design service and general operational costs associated with the production of the *Crimson & Gold* newsmagazine distributed to more than 87,000 Ferris alumni, employees and friends.
- Explore creative solutions for expanding graphic design services to meet a growing demand for high-quality, integrated admissions, advancement, alumni, college and departmental marketing communications that help solidify the University's brand.



- Continue to employ a part-time photographer who now significantly increases photographic coverage of University events and athletics, contributes to a growing demand for videos for the Web and maintains a comprehensive cataloging and archiving system for photos.
- Preserve Ferris State University's photographic history by acquiring new computer hardware and software to store and search for thousands of University photographs.

News Services/Media Relations

- Continue to participate in Emergency Management Team table-top exercises and other proactive measures to improve crisis and issues management communications.
- Collaborate with Academic Affairs and the University community to further enhance the Faculty Experts Web site and to identify opportunities for publicizing outstanding academic programs; faculty research, honors and achievements; and academic/community engagement activities.
- Implement a campus beat system for identifying stories that address the needs of the state, raise the awareness and academic reputation of Ferris and support the University's strategic goals, Marketing Plan and legislative agenda.
- Cultivate and expand relationships with the news media in Northern, Western and Southeastern Michigan to better position us to provide stories, leads and visual resources to increase positive coverage of Ferris State University.
- Improve the Campus News Web site by exploring best practices in the delivery of campus news such as e-newsletters, on-line daily news journals, live video, etc.

Web/Multi-Media Services

- Work creatively as a cross-divisional team to edit and publish more multimedia content that showcases student life and academic programs.
- Improve the user interface for the Content Management Systems through software upgrades and feedback from departments.
- Develop a multimedia-driven Future Students site to give prospective students a real slice-of-life experience.
- Continue to work with search optimization consultant to keep Ferris State's rankings high in the keyword search results for Google and major search engines.
- Utilize a collaborative, strategic approach to maintaining, improving, evaluating and anticipating future resource needs to keep a dynamic, competitive Web presence.
- Roll-out "Lift-Mobile" interface, allowing users of handheld devices to receive a customized, text-view of the Ferris Web site.
- Determine the value of emerging technologies and applications such as text/instant messaging, podcasts, file sharing and portable/"always on" content to the constituents UA&M serves and how they should be incorporated in division activities.



- Implement a fully functional, proactive Web Content Development Team who can respond to the growing demand for Web Content services throughout the University by providing more individualized assistance to employees who will be better trained to keep departmental/divisional pages up-to-date, within graphic standards, easy to navigate and customer-focused.



2007-2008 Unit Action Plan

Division: University Advancement & Marketing

College/Unit: University Advancement & Marketing

Department: Vice President's Office

Significant Areas of Success:

- Assisted with fundraising for the annual Foundation for Excellence Benefit.
- Made and assisted with personal solicitations to individuals resulting in private support to the University.
- Participated in numerous alumni and advancement events.



Ongoing or Proposed Significant Activities:

- Continue to support development and refining of internal activities for Advancement area.
- Maintain and adjust organizational administration structure.
- Assist with the Ferris Foundation activities.
- Serve as the Executive Director of The Ferris Foundation.
- Develop and recommend strategy for capital campaign including needed resource allocation required for successful results.
- Continue to recruit employees who will have an affinity and passion for promoting and assisting with fundraising for Ferris State University.