Development

Development Assessment and Planning Report
Missouri Valley College

Year: FY11
Service Program: Development
Supervisor: Eric Sappington

I. Mission

The mission of the Development Office is to strive to increase Missouri Valley College's endowment and annual income in order to financially ensure a secure future for present and future generations of students. Staff members strive to cultivate relationships with all internal and external constituents in order to ensure continued financial stability of the Institution.

II. Goals

1. Identify friends/alumni with giving potential.
2. Maintain communication and build relationships with donors, serving as a link between donors and the college.
3. Increase donor participation to Missouri Valley College.
4. Match the philanthropic interests of donors with needs of the institution.

III. Service outcomes

1. Friends and alumni with giving potential are identified.
2. A positive image of Missouri Valley College and its constituents is maintained and promoted.
3. Donor participation to MVC is increased.
4. The philanthropic interests of donors are matched with the needs of the institution.
IV. Service delivery map

<table>
<thead>
<tr>
<th>Functions</th>
<th>Marketing</th>
<th>Media Relations</th>
<th>Alumni Relations</th>
<th>Development Database Management</th>
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</thead>
<tbody>
<tr>
<td>Donor giving potential identified</td>
<td>(X)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Positive image is maintained and promoted</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Donor participation increased</td>
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<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Donor interest matched with Institutions needs</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

V. Assessment tools

1. Service Outcome: Donor participation to MVC is increased.
   a. Reports detailing donor giving pulled from CampusAnyware database. (DIRECT)
2. Service Outcome: Friends and alumni with giving potential are identified.
   a. Reports showing first time donors as well as repeat donors pulled from CampusAnyware database. (DIRECT)

VI. Summary of findings

In response to the 2009 assessment, in fall 2010 the campus received a new database management system that allowed the Development office to record and process gifts more efficiently. The database system allows the Development office to run reports that can be used to assess donor participation.

In response to the lengthy time it took for gifts to be processed and receipted, the new database management system was implemented to ensure that all gifts are processed within 48 hours of their arrival into the office. The technology of the new system allows for this process to move efficiently with a small margin for error. This form of communication with the Institution’s donors helps maintain and promote a positive image.
The new database allows MVC to obtain more information from its donors than was available before. This will assist in matching the philanthropic interests of donors with the institutions needs. The new system includes an “interest” field, which will allow MVC to note the interests of the donor, therefore matching their interests for giving purposes. The database also allows the Development office to store information regarding planned giving, which is another helpful tool in identifying donors giving potential.

The system allows the Development office to run reports that show donor participation based on several different criteria, including, graduation year, region, interest, etc. These reports help the IA office target groups of donors more efficiently. The reports also allow MVC to track donations made to all campus accounts.

Social media campaigns to track down alumni are continually successful. There is still room for improvement in tracking down unknown alumni.

An emphasis in direct communication with top donors via a monthly newsletter has proved to be successful in keeping them connected with the Institution.

It is imperative to maintain and promote a good image of MVC with its constituents. Members of the Development office staff spend time traveling to visit top donors throughout the United States to maintain its image. As more and more donors are identified, MVC will spend more time and money traveling to visit alumni and friends.

A comparison report for the year-to-date through June 30 indicates that MVC received more unrestricted and restricted gifts in FY11 than FY10. Overall MVC’s donor giving was up from FY10.

VII. Level of achievement of goals

Direct assessment tools allow us to quantitatively measure the donor participation and total giving, and then compare it to previous years. A comparison report for the year-to-date through June 30 indicates that MVC received more unrestricted and restricted gifts in FY11 than FY10. Gifts made to the endowment for FY11 dropped significantly, and were at a five year low. See Chart 1. Restricted gifts were second highest in the past five years. Although the reports processed by the new database system are helpful, it should be noted that the new system was
only used for half (December-June) of FY11. Next year, the reports will reflect a more accurate picture of specific donor gifts.

The giving results of FY11 were better than expected.

**Chart 1**

![Chart 1](image)

**Chart 2**

![Chart 2](image)
There are factors to consider when comparing the total giving over several years. For example, Chart 2 shows that the giving for FY09 is over one million dollars less than the previous year. That is accurate, but it doesn’t show that MVC received its largest gift of just over one million dollars in FY08. In order to show the most accurate findings, variations such as these will be considered when comparing previous years and assisting other departments when building budgets, etc.

Understanding where donors are giving allows the Development office to focus its outreach. Below you can see specifically where a majority of MVC’s gift are directed.

**Campaigns**

![Pie Chart](image)

The pie graph above displays the campaigns that bring in the most revenue for the college. In this case a campaign is the means in which Missouri Valley College received the money. It is worth noting that the campus database, CampusAnyware, wasn’t installed until December of 2010. In the previous database gifts could only be characterized as restricted, unrestricted, scholarship or gift in kind. These categories were left off because they don’t describe how MVC received the money. Reports for FY12 will be more accurate.
A large portion of MVC’s gifts are received in response to athletic teams. Approximately 430 restricted gifts were given, and of those 430 gifts, 391 of them were designated specifically to athletics. Nearly half of all gifts (42 percent) are athletic in nature. Knowing this, it is imperative that the IA office match donors with their particular interest — be it athletics or the arts.

Twenty-one percent of MVC’s gifts come from outside scholarships designated to specific students. As state funding is negatively affected by budget cuts, it will become more and more important that MVC secure funds for student scholarships.

EOY gifts are gifts that are the result of the End of Year letters that the IA office sends out in December and June. The college received 97 gifts as a result of the winter letter, which brought in nearly $41,000 in funding; a clear indicator that the letter is successful. The summer letter was unable to be tracked because it was sent out before the office had the capability to do so.

Unsolicited gifts are those that the college received that were NOT the result of a letter or visit or other solicitation.

Other campaigns included gifts to clubs, gifts in kind, MVC license plates, matching gifts, memorial gifts, capital campaign gifts, social gifts. Next year’s report will show a more accurate reflection of the different campaigns because they will have been used for the entire year.

CampusAnyware, the campus’ new data management system, has significantly exceeded the expectations of the Development office. The system allows for flexibility and efficiency in several Development processes. The new system includes an “interest” field, which allows MVC to note the interests of the donor, therefore matching their interests for giving purposes. Information entered in the interest field has been successfully used to pull mailings lists for the baseball team, and could be used for any sport, giving teams’ access to potential donors. The database also allows the Development office to store information regarding planned giving, a helpful tool in identifying donors giving potential. Previously, limited information regarding giving was tracked on a Microsoft excel sheet that could only be accessed by the director in institutional advancement. Approximately 20 planned giving records
have been added into CampusAnyware allowing the entire office to update and track this information. The database also allows for more thorough input of information.

The new database system allows the Development office to run reports that show donor participation based on several different criteria, including, graduation year, region, interest, etc. These reports help the Development office target groups of donors more efficiently. The reports also allow MVC to track donations made to all campus accounts. Specifically the athletic department benefits from these reports because coaches are able to track donations on a day-to-day basis.

In response to the lengthy time it took for gifts to be processed and receipted, the new database management system was implemented to ensure that all gifts are processed within 48 hours of their arrival into the office. This is an improvement from the previous goal to have gift processed within two weeks of their arrival. The technology of the new system allows for this process to move efficiently with little room for error.

A system of checks and balances was set up to be able to audit the gift receipting process to periodically check that gifts are being processed in a timely manner. When gifts enter the Development office the amount, giver, date the gift was issued, and date the check was received in Development are recorded. This record allows any disputes in the timely process of gifts to be resolved. After the gifts are processed a trial report is ran and sent to accounting for approval, after approval the gifts are posted and sent to the business office for deposit. Following posting of the gifts, receipts are run immediately.

An emphasis in direct communication with top donors via a monthly newsletter has proved to be successful in keeping them connected with the Institution. Approximately 30 donors were added to the distribution list in FY11. Social media campaigns to track down alumni are continually successful. Over 150 alumni updated their information in FY11. There is still room for improvement in tracking down unknown alumni.

In FY09 the Development office made 49 donor visits. In FY10 the office made 81 donor visits. The increase in donor visits is the result of visits made to specific donors to ask for funds for a capital campaign. In FY11 the office made 54 donors visits. When we compare FY09 to
FY11, we see that the office is slowly increasing the amount of non-solicitation donor visits. These visits help maintain MVC’s positive image with its donors.

### Table 1. Staff Profile

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<thead>
<tr>
<th></th>
<th>Full time</th>
<th>Part time*</th>
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<th>GA Part time*</th>
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*Part time is defined as 20 work hours a week or less.

**IX. Analysis/Interpretation**

The new campus database system has been integral in modernizing gift processing and the storage and retrieval of donor information. The checks and balance of the gift processing system works well to ensure that gifts are processed timely and accurately.

New reports generated through the new database allow MVC to target its donors more effectively. Being able to identify donors giving potential and interests has resulted in an increase in donor participation and giving. Although the Development office is utilizing the new system there are several additional tools that can be used. The more familiar the office gets with the new system, the better reporting and recording keeping the Development office will have. Since MVC is the pilot school for the donor advancement module, glitches and issues with the donor module continue to plague the process.
MVC continues to engage more and more alumni through its direct communication, socials, and personal visits. The Development office is in significant need of a refresh of its donor mailing/contact information. As the economy falls and people are forced to relocate, they don’t update their information with the college so we can no longer track these alumni or get our mailings to them.

We can see that athletics continues to be a big draw for donations. Despite the need for major gifts, and foundation support MVC still depends on the contributions it receives from individual donors. Major donors continue to give, but they are narrowing their focus to where they can make a bigger impact. This is evident in the fact that several of MVC’s largest gifts are restricted to a specific project, rather than an unrestricted gift. We can also see that our December end of the year letter is successful, next year we will be able to analyze the effectiveness of the summer end of year letter.

X. Action plan

There are several measures under consideration by the Development office to improve the program. One of the major measures is to hire an outside agency to clean up our donor mailing information. The office is currently in negotiations with WealthEngine, a company that may be contracted to find missing alumni as well as those who have insufficient address information. This will significantly improve the effectiveness of mailings and outreach to donors. Currently MVC has approximately 3,000 unknown alumni.

Another service offered by WealthEngine is the ability to identify donors giving potential. Understanding the giving potential of donors allows MVC to direct its focus when trying to secure major gifts for capital campaigns.

As the office continues to learn more about the CampusAnyware database more work will need to be done to maintain the information in the system. In FY11 the interest field was used for the baseball team. This included a manual input of information, and although it was time consuming it proved to be effective in pulling a mailing list of all MVC baseball players. Ideally, the Development office would like to input this information for each sports team and organization, however, that information has not been kept by the college for years so the
information would have to be manually retrieved, and could be inaccurate. Discussions will continue on how to utilize the use of the “interest” field.

The office staff will continue to cultivate relationships with donors in an attempt to engage them into the happenings of the college. After they are engaged, it is the goal to continue to keep them engaged via communication. Retaining donors is cost effective and a great way to build permanent relationships. The Development office had identified several new locations to hold alumni socials and several new donors to visit.