

COLUMBUS STATE UNIVERSITY
University Advancement – Alumni Affairs
 FY 01 STRATEGIC PLANNING ASSESSMENT

GOAL*		PLANNING INITIATIVE	ASSESSMENT OF RESULTS
INSTITUTIONAL	UNIT		
8	3	Increase Alumni Association donations to \$87,000 and total alumni Annual Fund donations to \$150,000	Alumni Association donations totaled \$69,618 as of 5/15/01. June is the month when the Alumni Association receives the most donations, so the goal is within reach. Total alumni Annual Fund donations totaled \$176,560.04, reflecting the trend for more and more alumni to designate their donations to specific departments as a result of department-based phone-a-thons or to the Foundation's unrestricted account.
8, 4	1, 2, 3	Identify, research, and implement a fund-raising, friend-raising event which will generate \$10,000 or more for the university	Organized a fund-raising task force, including alumni, faculty, staff, and community members to determine the type of event; implemented the first of their recommendations, an Alumni Association golf tournament, which was held on March 14, 2001 and generated over \$9,000.
8	2, 3	Hold at least one young alumni event	Held a Young Alumni Social on September 28, 2000 and a Young Alumni seminar on wills on October 26, 2000. These events attracted a small number of enthusiastic Young Alumni and provide the foundation for future Young Alumni events.
8	3	Implement a department-based phone-a-thon in the College of Science	Held a College of Science phone-a-thon as part of the annual Alumni phone-a-thon, raising over \$5,000 from College of Science alumni. Over \$2,500 of that money went directly to the College of Science.

GOAL*		PLANNING INITIATIVE	ASSESSMENT OF RESULTS
INSTITUTIONAL	UNIT		
8, 4, 1	1, 2, 3	Collaborate with the Admissions Office and other appropriate units to plan and implement recruitment efforts, involving alumni in the efforts	Initiated and coordinated visits to 9 high schools (8 in Columbus and one in Harris County) to meet with their faculties to recruit them as CSU students and request their assistance in recruiting their students. Provided refreshments and alumni greeters for 3 Visitation Days. Provided refreshments and alumni greeters for the Parents Hospitality Room for the state Science Olympiad hosted by CSU.
8	2, 3	Evaluate Alumni Association organization and activities	This on-going process will be addressed at the Association's annual meeting on June 18 with specific by-law revision proposals, including the addition of an Alumni Council Emeritus category, Honorary Directors, a Young Alumni component, and revision of Alumni committee structures to delegate more responsibilities to committees, allowing the Alumni Council to be a more prestigious, policy-making organization.

*Institutional Goal is goal established in the University Strategic Plan. Unit Goal addresses the Institutional Goal.

COLUMBUS STATE UNIVERSITY
University Advancement - Alumni
FY 02, LEVEL 2 PLAN

GOAL*		PLANNING INITIATIVE	COST	PLANNED IMPACT
INSTITUTIONAL	UNIT			
8	2	Cultivate and involve a larger number of alumni as volunteers and develop volunteer responsibility for some events.	*	Increase alumni involvement with CSU. Free up alumni staff time for management activities.
8	3	Increase Alumni Association donations to \$90,000 and total alumni Annual Fund donations to \$200,000.	*	Increase by \$28,000 the money available for CSU departmental funds and Alumni Association scholarships.
8, 4	2, 3	Hold a cooperative CSU department/Young Alumni event attracting 100 or more participants	*	Increase alumni loyalty to CSU and increase donations to the Annual Fund.
8	1, 2, 3	Implement and coordinate a fund-raising, friend-raising event in partnership with the city of Columbus and local arts organizations.	*	Create an awareness of CSU's presence in uptown (including the RiverCenter, Rankin, Coca-Cola Space Science Center), create an awareness of cultural arts activities in Columbus, coordinate city-wide marketing of an event under one umbrella, create business for uptown businesses, raise money for the Alumni Association's scholarship funds.
8	3	Implement department-based phone-a-thons in the departments of art and theatre	*	Increase donations to Friends groups by \$5,000, providing more funds for scholarships and other departmental needs.
8	2, 3	Implement revisions of the Alumni Association organization.	*	Increase alumni involvement with CSU.

Institutional Goals were established in the University Strategic Plan. Unit Goals address the Institutional Goals.

*The costs of these initiatives will be paid by the Alumni Association budget.

COLUMBUS STATE UNIVERSITY
University Advancement—Development
 FY 01-STRATEGIC PLANNING ASSESSMENT

GOAL*		PLANNING INITIATIVE	ASSESSMENT OF RESULTS
INSTITUTIONAL	UNIT		
8	1,2,3	Increase giving to Annual Fund from \$1,000,000 to \$1,100,000	As of May 15, gifts to the Annual Fund totaled \$1,055,470. We expect to exceed the \$1.1 million goal before June 30, 2001.
8	3	Create job descriptions for Annual Fund volunteers	This was done, resulting in improved job definition and volunteer satisfaction.—
4,8	3	Plan and conduct planning retreat for Annual Fund Leadership	Retreat was held at Tom's Lake on June 15. Ideas generated were implemented in the campaign.
4,8	1,2,3	Broaden donor and volunteer base, with special attention to ethnic and geographic diversity	Annual fund donor base increased by 12.4%, from 2,941 donors to 3,307, including a 26% increase in donors to CSU DAY. No significant increase in ethnic diversity of donor base documented. Several Tower Society donors from outside the area were identified and cultivated. Tower Society (alumni donors at \$1000 per year) increased by 10%.
8	3	Establish the implement the work of the CSU Foundation Development Committee	Committee organized with two sub-committees (Annual Fund and Major and Planned gifts.) Handbook developed and trustees have identified prospects to cultivate and solicit.

GOAL*		PLANNING INITIATIVE	ASSESSMENT OF RESULTS
INSTITUTIONAL	UNIT		
3,4,8	2,3	Establish additional departmental/program “friends “support groups.	<p>Friends of art established, with steering committee and board and several successful events. \$27,000 has been raised by the group this year, compared to \$3000 last year.</p> <p>Friends of the Coca-Cola Space Science Center has held organizational meetings. No chair or board formed as of May 15.</p>
4,8	1,2,3	To develop an annual event to honor persons who have established endowment funds	Legacy Society members were invited to the Founders Society dinner, and Scholarship endowment donors were invited to January Trustee meeting, Business College luncheon, College of Education dinner as well as making visits.
3,4,8	3	Conduct feasibility study, determine monetary goal recruit campaign leadership, and begin quiet phase of capital campaign.	Preliminary case developed with seven task forces involving community leaders. Feasibility study to begin May 22.

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COLUMBUS STATE UNIVERSITY^{cs}
University Advancement - Development
FY 02, LEVEL 2 PLAN

GOAL*		PLANNING INITIATIVE	COST	PLANNED IMPACT
INSTITUTIONAL	UNIT			
8	1,2,3	Raise \$1,150,000 for the Annual Fund		Provide support for scholarship, outreach and academic program enhancements
4,8	2,3	Broaden donor base by 15 %, especially in minority community		Create larger pool for fund raising, more diverse support
8	2,3	Expand volunteer appreciation and recognition activities, especially for steering committee		Improve job satisfaction and enhance volunteer commitment to CSU
8	1,2,3	Expand Tower society membership by 15%		Increase alumni participation and increase funding sources
4,8	2,3	Increase effectiveness of CSU Foundation Trustee Development committee, including involving trustees in promoting planned giving		Enhance fund raising effectiveness, as trustees become effective volunteer solicitors.
8	3	Develop personalized plan for cultivation for each trustee's prospects		Secure major gifts commitments and improve cultivation results
4,8	3	Publish planned giving newsletter	\$2500	Increase visibility of CSU and promote planned gifts
8	3	Expand the planned giving program as a part of the Capital campaign		Increase support for university programs through planned giving
8	3	Recruit Capital campaign leadership and raise 35% of the goal		Increase funding for university programs

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COLUMBUS STATE UNIVERSITY
University Advancement - Advancement Services
 FY 01 STRATEGIC PLANNING ASSESSMENT

GOAL*		PLANNING INITIATIVE	ASSESSMENT OF RESULTS
INSTITUTIONAL	UNIT		
8, 9	3	Develop a comprehensive Advancement Services Manual including work flow, specific job duties, and back-up responsibilities.	This on-going process resulted in a University Advancement Reports Manual including duties, acknowledgement letters, and report distribution lists. This allowed Advancement Services staff members to process 637 additional gifts (a 13.4% increase from FY00) and to provide timely fund-raising reports to University Advancement staff members, including daily \$10,000+ reports, weekly reports of \$1,000+ donors, and \$250+ donors, Friends groups reports, and reports on specific fund-raising events such as CSU Day. These reports have allowed advancement staff members to better communicate with our constituents and volunteers. Additionally, monthly financial reports are now being sent to 57 CSU departments so that they can better keep track of their funds and spending. Areas still needing improvement (including a chapter in the Advancement Services Manual): posting of quarterly interest, developing a Foundation, Foundation Properties, Alumni Association, and Athletic Fund accounting reports schedule, and timely completion of these reports.

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COLUMBUS STATE UNIVERSITY^{cs}
University Advancement – Advancement Services
FY 02, LEVEL 2 PLAN

GOAL*		PLANNING INITIATIVE	COST	PLANNED IMPACT
INSTITUTIONAL	UNIT			
8, 9	3	Upgrade University Advancement Software package to provide for automation of Foundation Properties, Foundation, Alumni Association, and Athletic Fund reports.	\$5,000.00	Provide timely reports to all University Advancement units as well as all university departments involved in raising or spending CSU Foundation, Alumni Association and/or Athletic Fund monies. Provide better stewardship of monies raised with on- and off-campus constituencies and enhance the image of the CSU University Advancement division. The long-range impact is to increase donations to CSU.
8	3	Upgrade classification of selected positions in Advancement Services.	\$7,500.00	Provide proper compensation for Advancement Services personnel, thereby preventing turnover and the resulting re-training and staff downtime costs.
8	3	Complete University Advancement manual.		Provide for the smooth operation of Advancement Services, resulting in timely reports, better stewardship, an enhanced image of University Advancement, and increased donations.

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