**NEASC Memo Draft**

**February 7, 2018**

Date: February 10, 2018

To: NEASC

From: Paula Lee Hobson, Vice President

Subject: Confidential University Advancement Plan Outline

In July 2014, Plymouth State University hired a new Vice President of University Advancement, Paula Lee Hobson, to implement significant changes with a long-term goal of significantly increasing fundraising and marketing to support the institution. The leadership team created a plan. The University Advancement Plan has been implemented and contains confidential and proprietary information that is outlined below.

*Goals*

* Increase fundraising support for the University.
* Transform former public relations team into marketing team.
* Enhance alumni engagement in the institution.
* Launch the integrated clusters brand for the institution.

*Results*

* Steadily increased fundraising through combined cash, pledge and bequest intention gift types: from $1.2 million (FY14) to $2.6 million (FY16) to $5.2 million (FY17).
* Significantly enhanced alumni engagement through new chapter development in new geographic and affinity-based areas.
* Directly supported student recruitment with integrated marketing communications plan, including new University brand development and rollout. Enrolled three of the largest first-year classes in the institution’s history.

*Prospect Identification, Qualification, Cultivation, Solicitation and Stewardship Strategies*

* Update wealth screen and likelihood-to-give models in Raiser’s Edge (prior screen was completed in 2012). Completed.
* Focus fundraising on three strategic priorities set by President: stadium and turf field; Strength and Conditioning Open Laboratory; student scholarships (prior fundraising was scattered across many initiatives, which makes it difficult to make compelling case for support). Ongoing.
* Revise MGO and PGO portfolios based on wealth screen and likelihood modeling. In process with expected completion date in March 2018.
* Reassign former gifts administrator to donor relations to create and implement donor stewardship program. Completed and ongoing.
* Create and implement 5-3-1-1 monthly prospect review program with MGOs and PGO with semi-monthly review of moves management strategies (at a minimum: five identified prospects in qualification for a specific gift, three qualified prospects in cultivation for a specific gift; one prospect in solicitation preparation; and one first visit per MGO and PGO). Completed and ongoing.

*Infrastructure Buildout Strategies*

* Convert alumni and donor database from antiquated Banner Advancement to industry leader, Blackbaud Raiser’s Edge. Completed.
* Provide Raiser’s Edge training for all University Advancement staffing; set new expectation that all alumni and donor contacts will be entered into Raiser’s Edge. Completed.
* Create major gifts officer (MGO) and planned giving officer (PGO) monthly, quarterly and annual metrics; refocus prospect review meetings on achieving these metrics. Completed and ongoing.
* Overhaul manual annual fund program to fully automated, technology-driven annual giving calling program. Improved efficiency, increase financial support, and used student workers to implement. Completed.

*Staffing Strategies*

* Hire first planned giving officer in the institution’s 147-year history. Completed.
* Hire additional major gifts officers as funding allows. One completed.
* Refocus efforts of alumni relations director to include fundraising portfolio. Completed.
* Hire assistant director (former events position) of alumni relations and volunteer engagement to develop new alumni chapters to expand base of giving and engagement. Completed.
* Hire permanent marketing director to ensure Vice President can function as working MGO. Search is nearing completion, February 2018.
* Reduce Advancement Services from staff of 5 to 2.5 through implementation of Raiser’s Edge and related process changes. Retool these positions into new areas of the University.
* Change former administrative assistant roles to program support assistants who are trained in Raiser’s Edge and Salesforce to directly support frontline fundraisers.