
In April 2015, the Alumni Association Board of Directors and the Foundation Board of Directors for Central Washington University (CWU) contracted with The Ostara Group to conduct a comprehensive Advancement program review and organizational campaign readiness assessment.

Our engagement focused on gaining insights and making actionable recommendations with clear next steps. The following recommendations are intended to be implemented within the next 24 months. Implementation should occur simultaneously with institution-wide vision and planning exercises that CWU leadership must complete in preparation for a comprehensive, large-scale major giving campaign.

The Ostara Group would like to thank the Central Washington University Foundation, Alumni Association, CWU’s Advancement Team, and all of the others on-campus and off (Dean’s, Cabinet, etc.) for their time and the opportunity to work together over the past three months to assess CWU’s Advancement program and overall campaign readiness.

Executive Summary

Working closely with CWU’s Advancement leadership team, The Ostara Group was oriented quickly to CWU’s fundraising issues, challenges and opportunities. We have incorporated key findings into the following report sections:

A. Executive Summary
B. Benchmarking & Context
C. Program Review & Recommendations
   1. Vision
   2. Planning
   3. Culture of Philanthropy
   4. Alumni Relations
   5. Annual Giving
   6. Major Giving
   7. Planned Giving
   8. Corporate & Foundation Giving
   9. Staff Structure
Our team performed an in-depth assessment of CWU’s current Advancement operations and its institutional culture. We also conducted a benchmark study of ten higher education Advancement enterprises, which included programs that are both comparable and aspirational to CWU in terms of size and scope.

Our goal was to determine if CWU is prepared for the rigorous planning and execution required to launch and manage a successful multi-year, multi-million dollar comprehensive campaign, which would include capital, operational and endowment/scholarship gifts.

Ostara assesses the strength of an organization’s fundraising program through three distinct lenses: culture, capability and capacity. When all three are strategically aligned and working in partnership, an organization is significantly more likely to create a sustainable development enterprise. Alternatively, weakness in one or more areas can compromise operations and fundraising success.

- **Culture.** Organizational culture that understands, supports and participates in all aspects of development—from vision setting and strategic planning to donor cultivation and stewardship—is critical to efficient, effective and sustainable fundraising operations.
- **Capability.** Capability refers to each person in the organization’s level of experience and the quality of their work as it relates to the advancement process.
- **Capacity.** Organizational capacity refers to the processes, personnel, and budget to achieve desired fundraising goals.

Below is an overview of our findings related to CWU in these three vital areas.

**Culture**

Culture is the single most important element to successful fundraising, and the most difficult to create and maintain. An effective and sustainable fundraising program is unattainable without a culture that understands, supports and participates in all aspects of development, from vision setting and planning to donor cultivation and stewardship.

**Culture of Philanthropy**

A culture of philanthropy must be embodied by individuals at every level of the organization; from the Board to the Executive, from faculty/program to administrative staff. Each plays a role in prospect and donor identification, cultivation and stewardship. Advancement is a significant source of institutional revenue, and should be viewed as a vital part of the university.

As we see in many of our clients, CWU’s philanthropic culture is slightly disjointed. In some University departments, Advancement is viewed with skepticism and as a competitor for vital budget allocations. For faculty and staff who haven’t experienced the fundraising process, development is a foreign practice. Others want to participate, but haven’t had the training or opportunity to do so.
This is not an uncommon set of challenges. Every organization that raises money goes through an evolutionary process of culturally accepting philanthropy as a worthy, as well as necessary, endeavor. This is squarely where we find CWU as an institution: evolving.

**Institutional Vision**

Culture that is driven by an all-encompassing vision for the organization’s future is critical to philanthropic success. Without vision, donors have nothing in which to believe or invest. Vision is also the foundation and driver for all joint planning efforts between Advancement and the other campus departments and programs. Without it, planning is compartmentalized and ultimately ineffective.

We found that a broad and all-encompassing vision for CWU and its bright future has yet to be fully articulated. While fragments of institutional vision exist, we have not seen the unified vision necessary to inspire and maintain the momentum of a large-scale fundraising campaign.

It is important to note that this institutional vision can only come from the University as a whole; Advancement can share the vision with prospects, Public Affairs can build a communications plan around it, but ultimately, it must be created by the University itself. This report offers some suggestions for creating this holistic vision; however, again, because it must embody the entire institution, we recommend that vision setting be an inclusive process.

**Communication**

Institution-wide, intra-departmental communication around philanthropy must be addressed to foster a healthy fundraising culture. Communication issues leave CWU at risk for breeding a culture of mistrust, false perceptions, and a lack of respect for the fundraising process. For example, poor data integrity and unclear gift reporting and tracking processes between Advancement and the Colleges often lead to unanswerable questions and create doubt. A lack of understanding of, and experience with, the philanthropic process by some University leadership creates false perceptions of how fundraising is done, leads to distrust in the process, and jeopardizes budgetary investment in that process.

The Advancement Team must overcome barriers to communication and transparency by more directly engaging with University leadership. Committing to pre-scheduled and purposeful meetings to share plans, fundraising outcomes (successful and otherwise), donor activity, and tactical calendars will increase transparency. It will also educate leadership about the development process and their role in it, thus creating a supportive fundraising culture. A strong message must come from the top down that everyone, from Boards to the Cabinet, from Deans and Faculty to all Advancement sub-units, must take part in this work if it is to truly make the financial impact the University needs.

Our initial conversations with the Deans provided us with a sense of optimism. Although they have limited understanding of the process, they believe in the need for fundraising and want to know more about the plans being put in place and how they can, individually and collectively, engage in the Advancement team’s work. It will also be important that each department’s
Director of Development and their Advancement colleagues work diligently with chairs and faculty to ensure that the same level of understanding and support carries through to each faculty member on campus.

Of note, the Deans voiced legitimate concerns about issues including data integrity and reporting; donor stewardship activity and plans for the individual schools; and, how the Advancement team will work with them to develop more robust donor engagement plans. Several of our specific program area recommendations focus on these issues.

Interviews with Cabinet members proved to be more concerning. We learned about significant and historic challenges with Advancement team management, turnover, and transparency in the planning process. We also did not observe that they understand the Advancement process, generally. These Cabinet-level conversations revealed substantial skepticism around Advancement. This negative opinion obstructs the work and stifles the collaboration necessary to plan, to innovate and to build for the future.

To address cross-cultural disconnect in understanding philanthropy, having vision, and improving communication, we recommend providing an in-depth, mandatory development training for all institutional leadership, including Deans, Lead Faculty, Provost, Cabinet, President, and others. Advancement is vital to the University, and success requires anyone in a leadership role to support and understand it. It is not enough for Advancement department members to be well-versed in fundraising. In a well-developed culture of philanthropy, everyone understands fundraising and everyone participates. In short, the work cannot be done if the University cannot act as one.

**Capability**

Capability refers to each person’s level of experience with fundraising, and the quality of their work in the advancement process. Every participant must solidify their ability to participate in the advancement process. For example, Boards without knowledge of, or experience with, fundraising need to be trained in all aspects of the donor cycle so that they understand how those with different roles can complement their own work as Trustees. Executive leadership and faculty/program staff must know the process of fundraising so that they are prepared to identify, qualify and pass along potential donors. Advancement staff members need to be measured against appropriate performance metrics for both qualitative and quantitative goals. Finally, Advancement leadership must work with all participants to ensure ongoing professional development and the highest quality of work possible.

This will improve the capability of non-Advancement team members to participate more effectively in philanthropic work, and it will allow for added collaboration and creativity in strategic and tactical development planning.

The CWU Advancement team—especially the leadership team—is highly capable. The program has many strengths. Staff have a clear understanding of sound fundraising strategy and tactics, as well as the desire and tenacity to work through challenges. Each sub-team’s strategic plan is well conceived, and allows for a realistic path forward. Naturally, there are some areas for
improvement. We saw room for growth in performance management, individual accountability, gift processing and reporting, and cross-campus transparency. We also recommend focusing on building tactical plans that put broadly focused team-specific strategic plans into operational reality.

Overall, given the funding pressures, staff turnover, and organizational changes CWU Advancement has experienced, much of its internal work to date places the team on the right path for success. The team has made great progress, and continuing this momentum is a priority.

**Capacity**

Organizational capacity refers to the processes, personnel and infrastructure necessary to accomplish organizational fundraising goals. Often, an organization’s total investment into Advancement is insufficient to support the level of activity necessary to achieve desired fundraising outcomes. On average, four or five current donors must be cultivated to secure a single major gift. Even greater labor is required to close first-time gifts from newly acquired prospects. Inadequate staffing and infrastructure can immediately inhibit performance. This is especially true for organizations without a successful fundraising history, or those that are making significant changes to their fundraising program. An organization without a solid and sustainable pool of cultivated prospects and stewarded donors must front-load investment in Advancement to allow for the added time and activity necessary to stimulate giving. Our findings show that in some cases CWU has ample opportunity to develop its Advancement program. Increased investment in some program areas will show an immediate return and support sustainable growth.

The recommendations we provide in this report will highlight a few quick adjustments that CWU can make to limit inefficiencies. For example, planning and executing Commencement activities both drains Alumni department resources and confounds financial reporting of the return on fundraising investment. Among some benchmarked higher-education institutions, Commencement is housed in the Office of the Provost and Registrar, where student information is housed and accessed. Even if that office outsourced planning and production of the event to an outside event company, it would still be more efficient than pulling Alumni department staff away from their day-to-day activities to manage event planning and production—especially at the end of the school year when other, more donor-focused activities should take precedence.

**Moving Forward**

Our findings suggest that CWU’s Advancement program is poised to undertake the arduous process of preparing for a comprehensive fundraising campaign. But, bringing that process to a successful conclusion will take more than simply the will of Advancement: It will require institutional will and institutional investment.

CWU Advancement has improved its fundraising enterprise over the last several years. New accountability standards, a more donor-centric communications strategy, ongoing investment in
Alumni Relations, and continued improvement in staff capability contribute to a solid foundation for sustained growth.

The university’s need for funding, the deep desire among key leadership for increased fundraising activity and the untapped giving potential of its prospect pool also lead us to conclude that now is the time for CWU to make the critical investments necessary to sustain increased giving for years to come.

However, there is still much work to be done to bring the rest of the University along in this journey toward creating the culture, capability and capacity needed for a comprehensive campaign. Without the full participation of the entire institution in setting a vision, understanding the Advancement process, further investing in infrastructure and actively engaging staff in their specific roles, a long-term campaign cannot succeed. Preparation for a successful campaign, however, is achievable.

We project that this necessary preparation will take two to three years; but once completed, there are strong indicators for success.
Benchmarking and Context

**Approach & Methodology**

The Ostara Group conducted 60 hours of in-depth interviews with 52 faculty, staff, alumni, donors, and key institutional leaders to assess what is working well operationally, and what areas need improvement. We also reviewed 152 unique documents and materials provided by the Advancement team related to CWU’s fundraising enterprise.

Our benchmarking provides a baseline for comparison across similar institutions. We performed quantitative data analysis using datasets for four peer institutions and four aspirational institutions. This data was augmented by industry averages from a larger data set of 50 national institutions classified as CWU’s Masters-degree granting, larger program peers.

Benchmarked institutions include Eastern Illinois University, Eastern Washington University, Middle Tennessee State University, Southern Illinois University, University of Central Missouri, University of Northern Colorado, Western Illinois University, and Western Washington University.

We used a dual approach to measure CWU Advancement against these similar institutions. First, we sourced quantitative data from the Council for Aid to Education’s Voluntary Support of Education survey, a national data set. We used industry-standard data points and conversations with CWU to identify a cohort of institutions to use as CWU’s “benchmark.” To ensure parity, we considered total enrollment, alumni population size, location (rural/urban), governance structure (public/private), alumni participation rates, and total dollars raised annually. While we considered endowment size and endowment level per student, our report gives less weight to this data point given that endowment size and health is a function of many factors, including investment philosophy, market fluctuation and general timing. On the whole, endowment size alone is not an indicator of philanthropic/fundraising health or efficacy.

To complement this quantitative data, we conducted qualitative interviews with leadership at five peer institutions who represent levels of alumni engagement and fundraising success that CWU leadership seeks to attain. Though 15 were identified, four were unable to coordinate, and six unresponsive. We inquired about staffing levels, infrastructure, budget size, annual fundraising targets, major giving targets, technology use, and accountability metrics in place. A set of interview questions were developed and every attempt was made to solicit consistent information. In some cases specific requested numbers were not shared by the interviewee. The data collected from the peer institutions interviewed was largely qualitative and subjective.

**Benchmarking Findings: Vision, Planning and Culture**

Each institution we interviewed echoed the importance of collaborative relationships built across departments, and a culture of philanthropy among students and recent graduates. A successful development program relies on strong leadership and a bold, well-articulated and widely disseminated vision from University leadership. Some institutions conducted a needs
assessment from the ground up, and built the university’s vision by starting with each college or program’s top three priorities. Others, with a preference toward the president setting the vision, worked from the top down. In this case, the president identified a vision for where to take the university and then each college, school or program worked to identify how they would support that vision. In either case, a strong vision and strategic plan – both at the college and institutional level – was essential to the success of their fundraising enterprises.

Flowing from the institution’s vision and goals, the most successful fundraising enterprises work from a strategic plan for Advancement activities with goals that are dynamic and appropriate for each school, college or program. These plans incorporate specific expectations of, and are developed in tandem with, university leadership – especially college Deans.

Our cohort of benchmark institutions agreed that leadership and buy-in from college Deans is critical, but noted that Dean involvement in fundraising has not come naturally. Rather, each university described being intentional about building partnerships with the Deans and relied on the provost’s support to reinforce the value of their participation. On average, university Deans were expected to spend as much as 25 percent of their time on fundraising activities in collaboration with the foundation office and partner development officers. In many cases, each new Dean is given specific, measurable expectations related to development/fundraising. Peer institutions encouraged greater collaboration through structural changes. Some examples of departmental structure and clear expectations that support development/fundraising include:

- Directors of Development (DoDs) are on-site in the Dean’s office. (We understand that accountability issues have contributed to CWU moving away from this model).
- DoDs are members of the Deans’ leadership or management team, expected to attend meetings and have a seat at the table.
- 51% of DoD salary from foundation, 49% from institution.
- Deans dedicate one day each week to work on major gift or other fundraising work.

Many institutions expressed the importance of being service oriented, recognizing that Advancement is there to serve alumni—by providing opportunities to keep them connected to the university and each other, and to serve students, faculty and staff in pursuit of the mission of the university.

**Benchmarking Findings: Investment in Advancement**

All of the institutions that we interviewed described their fundraising performance and philanthropic culture at different stages of “emerging”. A recent Council for Advancement Support and Education (CASE) survey of investment in Advancement describes this terminology in this way: start up stage (institutions whose fundraising enterprise is ten years or younger), emerging (11–25 years) or mature (26 or more years). The chart below (figure 1) provides a national context for Advancement expenditures as a percent of institutional expenditures. Currently, CWU’s Advancement expenditures are 1.5 percent of the university’s expenditures, which is lower than average, even for other emerging programs.
### Middle 50th %ile

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<th>Category</th>
<th>Median</th>
<th>Mean</th>
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<th>75th %ile</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Count</th>
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<td>1.07%</td>
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<td>0.81%</td>
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<td>Start-Up</td>
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<td>3.22%</td>
<td>2.16%</td>
<td>3.73%</td>
<td>0.53%</td>
<td>8.04%</td>
<td>18</td>
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<tr>
<td>Emerging</td>
<td>1.91%</td>
<td>2.22%</td>
<td>1.29%</td>
<td>3.20%</td>
<td>0.09%</td>
<td>4.97%</td>
<td>42</td>
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<td>Mature</td>
<td>3.79%</td>
<td>3.53%</td>
<td>2.03%</td>
<td>4.88%</td>
<td>0.94%</td>
<td>8.00%</td>
<td>60</td>
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<td>In a Campaign</td>
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<td>3.07%</td>
<td>1.65%</td>
<td>4.30%</td>
<td>0.09%</td>
<td>8.00%</td>
<td>71</td>
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<tr>
<td>No Campaign</td>
<td>2.51%</td>
<td>2.97%</td>
<td>1.47%</td>
<td>3.97%</td>
<td>0.53%</td>
<td>8.04%</td>
<td>49</td>
</tr>
<tr>
<td>ALL</td>
<td>2.57%</td>
<td>3.03%</td>
<td>1.57%</td>
<td>4.17%</td>
<td>0.09%</td>
<td>8.04%</td>
<td>120</td>
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</tbody>
</table>

Total Advancement Operation Expenses as a Percentage of Total Institutional Operating Expenses.


**Figure 1**

- CWU’s advancement expenditures are below the national average for emerging programs (1.5% vs. 2.22%)
- The national average for advancement expenditures is 3.03% of total institutional operating expenses.

### Key Benchmarking Findings: Alumni Relations

Our research shows that for institutions of higher education, alumni engagement is the foundation of all advancement work. Re-connecting with lost alumni, engaging alumni with whom CWU has some relationship, and figuring out how alumni want to connect with CWU will be core challenges in the years ahead. Nearly all institutions we interviewed stressed the importance of allowing alumni to connect with CWU “whenever, wherever;” meaning, an increased and active presence on social media, valuable networking opportunities, and in many cases, career-related counsel.

All peer institutions interviewed identified that they are moving away from the alumni chapter model. Many also are moving away from the dues model. We found that these institutions are focused on making the relationship less transactional (e.g. membership benefits in exchange for dues), and more about the relationship with the university, the value they provide, and the services they offer. However, some larger institutions seem to still be investing in a paid dues model based on their ability to support a more robust member benefit structure.
This chart reviews CWU’s alumni affairs investment and return compared to national averages for similar institutions (using data set of 50 public master-degree granting/larger programs) and the eight pre-determined peer and aspirational institutions. The data indicates that while CWU’s investment in alumni affairs is well below the national average, and the averages of peer and aspirational institutions, its performance – or return on investment – is actually higher than those within the study.

<table>
<thead>
<tr>
<th></th>
<th>Public, Masters-Granting Universities, Nat’l Avg</th>
<th>Peer Institutions</th>
<th>Aspirational Institutions</th>
<th>Central Washington University</th>
<th>CWU Dashboard</th>
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<tbody>
<tr>
<td>Average Alumni of Record</td>
<td>72,069</td>
<td>80,576</td>
<td>105,764</td>
<td>94,499</td>
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<td>Alumni Staff FTE</td>
<td>4</td>
<td>6</td>
<td>6</td>
<td>4</td>
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<tr>
<td>Average Alumni Affairs Total Expenses</td>
<td>$441,953</td>
<td>$588,515</td>
<td>$781,525</td>
<td>$205,810</td>
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<td>Alumni Affairs Expenses per Alumni of Record</td>
<td>$6.13</td>
<td>$6.47</td>
<td>$7.39</td>
<td>$2.18</td>
<td></td>
</tr>
<tr>
<td>Percent of Alumni Solicited</td>
<td>76.3%</td>
<td>68.5%</td>
<td>86.5%</td>
<td>94.50%</td>
<td></td>
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<tr>
<td>Average Alumni Gift Size</td>
<td>$368</td>
<td>$178</td>
<td>$265</td>
<td>$285</td>
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<tr>
<td>Alumni giving as a percent of total giving for current operations</td>
<td>26.1%</td>
<td>27.6%</td>
<td>29.3%</td>
<td>27.9%</td>
<td></td>
</tr>
<tr>
<td>Alumni Participation</td>
<td>4.7%</td>
<td>3.5%</td>
<td>4.8%</td>
<td>2.37%</td>
<td></td>
</tr>
</tbody>
</table>

- CWU’s investment in alumni affairs/alumni relations is below the national average ($441,953) and below the averages for peer ($588,515) and aspirational institutions ($781,525).
- CWU’s investment in staffing is also below the average for similar size institutions – the average is 6, compared with 4 at CWU.
- Total dollars spent per alumni of record is low at CWU - $2.18 compared with a national average of $6.13.
- Meanwhile, the average alumni gift size has been healthy ($285) and the percent of alumni solicited is impressive (94.5%), indicating that the team has been doing a lot with a little.
- The alumni participation rate is a soft spot. We expect that with more investment in the area of alumni engagement, this figure will rise.

This next chart provides data points relative to alumni affairs/alumni relations key performance indicators. In this case, CWU’s investment is again on the lower-end of the spectrum in comparison with this group (four peer and four aspirational institutions).

<table>
<thead>
<tr>
<th>Institution</th>
<th>Alumni Particip.</th>
<th>Percent Alumni Solicited</th>
<th>Alumni Giving as % of Total Giving</th>
<th># Alumni of Record</th>
<th># Alumni Solicited</th>
<th># Alumni Donors</th>
<th># Alumni FTE^</th>
<th># Total Alumni Expenditures^</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Washington University</td>
<td>2.37%</td>
<td>94.50%</td>
<td>27.90%</td>
<td>94,499</td>
<td>89,296</td>
<td>1,967</td>
<td>4</td>
<td>$205,810</td>
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<tr>
<td>Eastern Washington University</td>
<td>4.00%</td>
<td>46.30%</td>
<td>32.70%</td>
<td>97,750</td>
<td>45,257</td>
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<td>3.70%</td>
<td>85.00%</td>
<td>25.10%</td>
<td>83,924</td>
<td>71,351</td>
<td>3,112</td>
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<td>University of Central Missouri</td>
<td>2.30%</td>
<td>100.00%</td>
<td>46.10%</td>
<td>95,665</td>
<td>95,663</td>
<td>2,221</td>
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<td>$586,426</td>
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<td>University of Northern Colorado</td>
<td>4.10%</td>
<td>96.20%</td>
<td>54.90%</td>
<td>114,375</td>
<td>110,031</td>
<td>4,650</td>
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<td>$701,119</td>
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<td>Eastern Illinois University</td>
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<td>100.00%</td>
<td>17.70%</td>
<td>92,600</td>
<td>92,600</td>
<td>4,302</td>
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<td>$567,638</td>
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<td>Middle Tennessee State University</td>
<td>4.80%</td>
<td>100.00%</td>
<td>33.40%</td>
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<td>5,086</td>
<td>6</td>
<td>$646,268</td>
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<td>Western Illinois University</td>
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<td>50.60%</td>
<td>41.80%</td>
<td>117,681</td>
<td>59,506</td>
<td>5,728</td>
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<td>Western Washington University</td>
<td>4.90%</td>
<td>95.40%</td>
<td>24.20%</td>
<td>107,348</td>
<td>102,375</td>
<td>5,233</td>
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<td>$658,043</td>
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<td>Average</td>
<td>4.16%</td>
<td>94.19%</td>
<td>34.49%</td>
<td>101,848</td>
<td>85,276</td>
<td>4,278</td>
<td>5</td>
<td>$624,318</td>
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- CWU Alumni Affairs/Alumni Relations staff FTE count is lower than averages for peers, aspirational institutions and national averages.
- CWU’s alumni expenditures overall are lower than national, peer and aspirational institution averages.

We also reviewed each of the five peer and aspirational institution’s alumni solicitation rates in relation to their alumni affairs/alumni relations full time equivalent (FTE) staffing levels and alumni participation rates. The results below indicate a strong correlation between the number of Alumni Relations FTE rates and alumni participation rates. This is because alumni are more likely to give if their relationship to the institution is strong.
and stronger relationships are better developed through strong alumni programming which is directly related to staff capacity.

- Higher staffing rates correlate to greater alumni participation rates.
- CWU has been able to contact and solicit a high percentage of its donors of record.
- With more consistent outreach and engagement, alumni participation rates over time will improve.

**Benchmarking Findings: Data and Metrics**

Data quality and management is mission-critical. Each institution interviewed noted that finding good ways to maintain, manage and organize large amounts of data is a challenge. But, each noted that “data is the foundation of everything we do.” Data – fundraising data, name, address, alumni and giving information, etc. – should be used to build and support the overarching plan and to monitor activities that drive the plan’s success. While fundraising metrics at the macro level can drive discussion about investment and goals, metrics for evaluation of progress toward goals must be developed on a case-by-case basis in collaboration with those who are ultimately responsible for carrying them out.

On the whole, institutions we interviewed noted that every frontline fundraiser and senior manager is accountable for achieving certain performance metrics, which are analyzed during annual reviews and at monthly meetings. The number of face-to-face visits, proposals submitted, gifts and dollars raised are the most commonly measured data points. Generally,
goals and metrics are determined for each individual based on the philanthropic potential within the college, school or program that they support.

Program Review & Recommendations

Ostara analyzed CWU’s fundraising and alumni program by reviewing documents pertaining to budget; brand and communications; donor-facing communications and messaging; development strategy, planning, and execution tactics; organizational charts and compensation schedules; and systems, policies and procedures in place. We also conducted interviews with each Advancement staff member, phone interviews with key volunteers from the Foundation and Alumni Association Boards, and in-person interviews with university leadership.

First, we provide context through best practices, then summarize our findings, and close with actionable recommendations for each of the following program areas:

1. Vision
2. Planning
3. Culture of Philanthropy
4. Alumni Relations
5. Annual Giving
6. Major Giving
7. Planned Giving
8. Corporate & Foundation Giving
9. Staff Structure

1. Vision

A. Best Practices. CWU is part of a shift in how public higher education is funded. Government support is shrinking, and there is no sign that this trend will reverse. This leaves two streams of revenue – tuition and philanthropy.

One element is common to success in driving both earned and contributed income streams: an inspirational vision for the future. This is the key to attracting additional students for tuition revenue and generating new or increased philanthropic support. A strong and specific vision is a best practice and a key structural element of success for any institution considering a significant campaign.

B. Our Findings. CWU’s current, institution-wide strategic plan is firmly rooted in its identity as an institution dedicated to the real-world success of its students in a broad range of disciplines and fields. Its vision statement clearly reflects this identity, and the plan provides a detailed set of goals, outcomes and metrics by which CWU will measure its progress in specific areas. But the plan does not meaningfully connect the dots of these goals, outcomes and metrics
to a bigger-picture, longer-term vision of impact on the world outside CWU. They must roll up into an image of the university’s future that is greater than the sum of its parts.

C. Our Recommendations. A campaign of the magnitude planned by CWU in the near future will require the University to draw a more inspirational line in the sand regarding its vision, and the impact CWU hopes to achieve in the next decade and beyond. The work done by the University with Ologie and Pyramid Communications sought to answer the questions: “Why CWU?” and “What differentiates CWU from the rest of the regional, public university marketplace?” These answers must now be used as the foundation for declaring definitively an intended future for the University that is compelling and inspiring for both prospective students and prospective donor-investors.

In addition to defining its distinction, CWU must explore its own identity. The key features that are synonymous with the university’s past - a strong option for regional students, focused on teacher-education and practical fields, with intimate class sizes - may or may not be compatible with an evolving vision for CWU’s future. For example, these traditional strengths could come into conflict with a vision that expressly seeks to attract national or international students, or that focuses more on research than practical training. Shifting economic demands may merit a pivot in approach, and we advise a thoughtful and inclusive process to define this future and the path to achieving it.

The institutional visioning exercise can be done from the top-down or vice versa, but it is absolutely critical as the institution prepares for a large-scale campaign. Building a campaign case statement naturally explores some of the critical thinking around “who we are, where we’ve been, where we are, and where we are going.” We suggest embarking on a campaign case development process beginning Autumn, 2015 that leverages the following resources:

- Central Washington University’s existing strategic plan.
- President Gaudino’s summer visioning sessions.
- Brand development research and recommendations developed by Ologie that are already being successfully deployed in Advancement’s external communications.
- Conversations with deans and department leaders across campus.
- Conversations with university volunteer leadership.

Following a typical campaign planning process, the campaign case development work would be followed by a feasibility testing process whereby the case would be shared with core supporters for review and feedback.

2. Planning

A. Best Practices. Fundraising and advancement thrive with robust strategic and tactical planning at the organization, department, and individual level. The most successful fundraising enterprises develop and work directly from plans that define desired outcomes, key strategies to achieve them, and superior tactics that underlie strategy. Additionally, organizations must
right-size their enterprise in context with the level of activity required to accomplish them. Planning must acknowledge the realities of current organizational capacity, and provide strategies for growing that capacity if the overall plan requires it.

It is a best practice that unit and sub-unit strategic plans should be reviewed regularly and refreshed every 3 years. Tactical plans for each team or sub-unit should be refreshed annually, as should individual work plans that support the team tactics and unit strategies. These tactical plans, individual work plans, and all metrics in all plans should be co-developed with the individuals who will execute them (not just department leadership) based on historical data. This generates buy-in of the work that creates a foundation of ownership and accountability on a team and individual level. Additionally, major gift officers should develop specific and concrete “moves management” plans for qualified major gift prospects that define a specific set of actions that move each prospect closer to a stretch gift.

B. Our Findings. As part of our program review, Ostara requested and reviewed CWU’s suite of Advancement planning documents. This includes strategic plans, annual tactical execution plans, and templates for individual staff work plans. The documents we reviewed include:

- University Advancement’s overall strategic plan, 2014 draft
- Advancement Services & Foundation Operations unit strategic plan, 4.17.15 draft
- Alumni Association unit strategic plan, 4.15.15 draft
- Development Team unit strategic plan, 4.10.15 draft
- University Advancement Annual Giving Calendar for 2015/16
- The blank formats for individual annual work plans, both for fundraisers and non-fundraising Advancement staff.

We found that this group of April 2015 Advancement Strategic Plans are strong documents outlining a bright future for Advancement. The University Advancement overall strategic plan and each sub-unit’s plan reflect the core themes of CWU’s institutional strategic plan, clearly connecting the work and potential impact of Advancement on each theme area. Areas for growth of CWU’s fundraising and alumni programs are clearly established in most documents, with solid strategies identified to underpin this growth. But, we found that the department and most sub-unit plans need one more layer of specificity in tactical planning to meet best practice requirements.

We found that the annual giving calendar we received as an annual fund plan lacks specificity of goals, metrics, and underlying tactics. A one-page list of appeal mailing dates is not a sufficient annual giving plan, nor does it reflect any long-term goals, strategies or tactics for growth year-over-year. We understand from team interviews that the pressure of meeting current fundraising goals puts multi-year planning efforts on the back burner. As an example, the Green Team strategic plan detailed below does contain metrics and goals for this area, but there is a disconnect between that level of specificity and the lack of detail in the annual giving calendar.
We also find that as a unit, Advancement lacks a strong and integrated Communications plan. The quality branding and messaging work by Ologie has been implemented strongly in individual pieces since January 2015, but there appears to be no overarching plan that laces this messaging together with a deadline-oriented editorial and tactical calendar by specific segment or audience. While the Ologie branding work is a substantive step in the right direction, there is need for dedicated staff to leverage and implement that work effectively.

Specific findings by sub-unit are:

- **Alumni Relations**: The Alumni Affairs strategic plan demonstrates knowledge of the external constituent and internal campus outreach that will build alumni engagement quickly. It clearly connects outcomes and strategy, and defines key metrics and measurables that will show success or the need for further investment. But, it lacks hard numbers for evaluation of success, and specificity of tactics that will lead to the outcomes and metrics.

- **Development Team**: The Green Team’s overall strategic plan succeeds in identifying areas for collaboration with other CWU departments and establishing annual fundraising metrics that have been historically lacking - not only in concept, but in practice. It defines specific goals for each measurable area, and identifies the need for a step-by-step donor cultivation and stewardship plan to support their strategies. The goals and performance metrics are very aggressive given historic alumni participation levels and the current infrastructure and capacity of Alumni Relations, the Green Team, and Advancement Services. But, with significant effort, they may be achievable within the five years covered by this plan.

We also reviewed the structure of individual work plans for the Directors of Development for each college. While they direct these staff members to specify their prospects and cultivation proposals, they do not define a moves management sequence that will push top prospects toward a commitment to CWU. The desired outcomes defined in the plan must be realized through these key moves management tactics and well-defined program of cultivation opportunities integrated with college-based assets.

- **Advancement Services & Foundation Operations (S&O)**: The S&O plan contains specific plans to solve some of the most pressing donor and financial data challenges. Given the urgent nature of these challenges and how they demonstrably affect both donor experience and internal staff morale, the plan offers a necessarily ambitious approach to solving them. But, staffing levels for executing this plan remain at status quo. This could potentially be a problem down the road as it relates to expectations and feeling successful.

**C. Our Recommendations.** With the strategic plans as a solid foundation, the next step for CWU’s planning is to create tactical plans that support the strategies for each sub-unit. These
should be specific and time-bound, and detail the roles and responsibilities for those carrying the plans out.

First, we recommend a multi-year plan for annual giving that supports the overall growth trajectory and meets the metrics specified in the Development Team strategic plan. Then, within this framework, we recommend the creation and execution of single-year tactical annual giving plans. More action-oriented than the multi-year, these plans should detail specific audience and affinity segments, key messages, and an integrated calendar for all types of outreach mechanisms, including events, hard copy communications, electronic communications, and the call center. We further define the elements of this plan in section 5 below.

Advancement should create a similar, donor-oriented communications plan to be managed by the new communications staff we recommend in section 9. This plan should leverage the excellent, insightful brand and messaging map developed by Ologie. It should specifically define how and when Advancement will execute on cultivation, stewardship, and solicitation communications through all channels, both electronic and hard-copy. This plan should be co-developed with the annual giving plan, as communications is a core element of the annual giving work.

All development and communications plans should be created in close concert with the staff who will carry them out; marrying their historic knowledge and operational expertise with the strategies and insight of department leadership. The existing strategic plans are ambitious, which requires cohesion across the department and swift execution on hiring and staff changes that we recommend later in this document. It also places higher demands on leadership to address some of the collaboration, communications and technical challenges expressed by Advancement and other staff.

Planning must be supported by accountability systems. We urge CWU to commit to regular quarterly plan reviews by sub-unit and as a unit. The goal of these sessions should be to measure quantitative and qualitative progress to date, to ensure that tactics are executed according to plan, and to reorient activity back to the plan if it has gone off-course.

Additional planning recommendations by sub-unit include:

- **Alumni Relations**: Continue building a baseline of data for evaluation and measurement, and add hard figures that turn abstractions into concrete goals.

- **Development Team**: Augment the metrics in the five-year 2020 plan by adding goals in each area to achieve by 2018, the halfway point of the plan. Ensure that Alumni-related metrics and major giving metrics dovetail precisely with what has been outlined in the Alumni Relations plan and Green Team moves management plans noted above. The metrics should be developed collaboratively with Alumni Relations staff and each Director of Development.

We also recommend that the Green Team collaborate with Advancement leadership to co-create and develop a standard moves management tool for use across departments.
Each Director can use this tool to create a specific moves management plan for all prospects that delves much deeper than a prospect name and a solicitation amount. It should include relationship owner or natural partner, specific affinities or affiliations, next steps, and a column to track the history of past moves.

- **Advancement Operations & Foundation Services:** Make the staff changes we recommend below in the staffing section to ensure the capacity, capability and morale necessary to carry out the plan.

### 3. Culture of Philanthropy

**A. Best Practices.** One of the most vital elements of successful higher education Advancement and in the field of fundraising overall is a thriving organization-wide culture of philanthropy. A culture of philanthropy is a set of organizational values and practices that support and nurture development within the broader organization. Our experience and sector research (such as the 2013 report *Underdeveloped*) demonstrate that the attitudes toward fundraising in the organization are as important to reaching fundraising goals as the quality and rigor of the fundraising activities themselves. An institution where both program and operations staff support the philanthropic process signifies a strong culture of philanthropy. For example, it is considered best practices that college Deans dedicate 20-25% of their time to fundraising and collaboration with Advancement.

We define a culture of philanthropy for higher education as:

- Most leaders in the university (across positions) act as ambassadors and engage in relationship-building and continuous dialogue with constituents.
- Most leaders in the university promote philanthropy and can articulate a case for giving.
- The Foundation Board or Board of Trustees are actively involved in building this culture through ongoing professional development, engagement with donors and prospects, acting as ambassadors externally and as a leveraging support structure internally.
- Advancement (including Alumni Relations and Development) are understood and valued, and viewed as a key mission-aligned component of the university.
- Advancement is integrally involved in university planning, strategy and goal-setting.
- The President, Provost, Vice Provost, unit leaders, college Deans, and faculty are committed to and involved in fundraising – with tailored support from Advancement.
- The university has invested in Advancement capacity, especially in appropriate staff size relative to goals and technology, and in infrastructure like financial, constituent relationship management, and communications technology.
- Advancement is allowed to focus on building long-term relationships with alumni and donors instead of a sole focus on short-term fundraising results per fiscal period.
- Organizational systems are established to support, align, track, and manage donors.

A significant fundraising campaign like that to which CWU aspires will demand even greater synchronicity and collaboration campus-wide.
B. Our Findings. During our assessment, we found that CWU meets several, but not all, of the aforementioned elements of a healthy culture of philanthropy. Both Advancement and non-Advancement leaders articulated that they could be collaborating more on fundraising. Each group identified challenges in the budgeting process, financial management, internal university politics, infrastructure investment, and staff capacity that are barriers to collaboration.

Advancement also has a reputation for opacity that has degraded other units’ trust in it. This perceived lack of transparency comes from challenges with reporting data and financial information, and from the school-wide need to improve internal communications and collaboration.

Though relatively new, Advancement leadership is aware of the need to develop CWU’s culture of philanthropy and make changes to respond to the concerns of other stakeholders. They have identified new strategies and tactics, including:

- Creating a regular calendar of educational opportunities for campus partners to learn best practices in higher education development.
- Engaging campus partners in determining their funding needs, the development of case statements for priorities, and in cultivation, solicitation and stewardship activities.
- Quarterly Deans & Directors gatherings that include social and educational components.
- Developing an ongoing engagement plan for the CWU Foundation and Alumni Boards.
- Establishing tracking mechanisms in Raiser’s Edge that allow Advancement to show and evaluate participation and assists from campus partners in fundraising success.
- Generating annual reports for internal stakeholders that report on progress.

Areas of strength in CWU’s culture of philanthropy include:

- Some leaders in the university act as ambassadors and engage in relationship-building and continuous dialogue with constituents.
- Some Cabinet-level leaders are committed to and involved in fundraising, with the new college Deans well on their way.
- Both volunteer Boards (Foundation and Alumni) plan to actively pursue strategic planning and Board development activities including skills assessments, Board orientation, and mentoring efforts.
- The university has invested in Advancement infrastructure like financial, constituent relationship management, and communications technology. New investments like Amplo are on track to become powerful tools for building community with alumni/donors.
- Organizational systems are established to support, align, track, and manage donors.

While Advancement is on the right path toward sowing a culture of philanthropy, not all university leaders are responding in kind. CWU leadership must find a way to reinforce the need for each college and unit to participate in philanthropic work with Advancement taking the lead role in modeling and instilling the behavior. Showing examples of existing success in collaboration (i.e. Athletics) will be more effective in this case than simply telling units to change.
Areas for improvement in CWU’s culture of philanthropy include:

- Many leaders in the university do not understand or promote philanthropy; in many cases, they do not understand what Advancement does or can do, and question the need for Advancement to exist at all.
- Similarly, Advancement is not understood and valued, nor is it viewed as a key mission-aligned component of the university.
- Because of this, Advancement does not appear to be integrally involved in university planning, strategy and goal-setting.
- Advancement staff’s location both downtown and on campus limits team cohesion at a critical time, contributes to existing team and sub-unit silos that limit staff efficacy, and complicates efforts to partner with critical on-campus resources like Deans and faculty.
- The university has not invested in appropriate Advancement staff size relative to goals and expectations for outcomes, particularly in Alumni Relations and Advancement Services. This challenge is related to the new Responsibility-Centered Management approach that drove cuts to the Advancement budget, despite organizational pressure to begin a resource-intensive campaign that would typically require greater investment in department budgets.
- There is significant short-term pressure on Advancement to deliver resources for immediate funding needs, which, given current Advancement capacity, detracts from the unit’s ability to focus on building long-term relationships with alumni and donors in preparation for a campaign.

**C. Our Recommendations.** First, we recommend that the University halt divestment in Advancement operations. Investing in fundraising demonstrates clear philanthropic culture. Reflecting on our experience, and on data from our benchmarking exercise, in order to build up to a comprehensive campaign, we recommend increased investment, particularly in staff capacity (please see details in the Staff section below). With the budgetary changes of the past several years, CWU’s Advancement efforts have reverted to a start-up phase. As such, CWU leadership should expect that investment in Advancement will have lower initial returns as they build capacity. Return on investment will increase as capacity and infrastructure issues resolve over the next several years.

In the context of the current Responsibility Centered Management approach, it is important to note that with fundraising, efficiency should not be confused with effectiveness. The overall objective of an institution’s fundraising program should be to maximize the net return on investment, not to spend as little as possible each year to raise money. For example: a program that annually costs $2 million and produces $10 million, or $5 for every $1 invested, may look good and is indeed efficient; but one that costs $2.5 million and yields $15 million, or $6 for every $1 invested, is presumably of more help to the institution, since it secures net results of $5 million more. Spending as little as possible should not be the primary concern when building towards a significant campaign.

Other factors affect CWU’s apparent fundraising costs per dollar raised. As mentioned earlier, we observe that the presence of Commencement in the operations and budget of Advancement
obfuscates the true cost of alumni relationship development and fundraising, artificially inflating the cost per dollar raised. Clearing the Advancement budget and operations of inappropriate line items like this will allow CWU to more accurately assess its ROI on fundraising over time – an important evaluation measure as the campaign draws near. Generally, institutions in campaign will have higher fundraising costs as it is a taxing endeavor, but one that will yield larger long-term gains. Budget allocations toward Advancement are an indicator of investment in a culture of philanthropy; as the campaign draws closer, we urge CWU to take the plunge on greater investment in Advancement capacity. The opposite approach will almost certainly lead to failure.

We also recommend that CWU move Advancement staff in all sub-units to a unified on-campus location. This could be achieved in myriad ways and over a period of time, but ultimately, CWU must solve the complications created by staff separation in multiple locations downtown before embarking on a campaign. The emerging culture of the Advancement unit and the organization-wide culture of philanthropy will both benefit significantly from improved communication, planning and collaboration that physical on-campus proximity will create.

We recommend that CWU allow Advancement to operate some of its lower level and more donor-centric communications more independently from Public Affairs, while continuing to partner with PA on strategic institution-wide communications initiatives. We tracked several examples of Advancement solicitation campaigns and other activities critical to raising funds that were delayed or dropped due to capacity and communications challenges with Public Affairs. This would, in fact, benefit both departments; capacity and effectiveness would be increased on both sides of the coin, while also allowing for each unit to focus on their respective goals of enhanced and efficient messaging to their end constituents – donors and prospects for Advancement, and the entire CWU population for PA.

In addition, CWU’s cabinet-level leadership must include Advancement in planning, strategy, and goal-setting conversations and activities for the university. Advancement has their finger on the pulse of constituent views of the university that should be integral to planning the university’s trajectory and future. Strategic plans and operating budgets for the university must take into account Advancement’s realistic assessment of what can be raised and what donors and alumni will be excited to support. Advancement is the center of a two-way conversation between CWU and its alumni and donors.

Advancement should build a culture of philanthropy by being more proactively customer service oriented in inter-departmental interactions at all levels, from leadership to administrative staff. Other departments’ positive attitudes about Advancement come from individuals on the team who naturally take a customer service approach to supporting others’ fundraising work. The whole Advancement unit needs to be held accountable for absorbing and living out this attitude as well.

Much of what Advancement leadership is doing behind the scenes or off the record with Deans and other university leaders has already had a positive effect on CWU’s culture of philanthropy. We recommend Advancement continue to build these relationships informally
and formally through mechanisms noted in their strategic plans; it will benefit every aspect of Advancement work, from Alumni Relations to Annual and Major Giving.

Advancement should also work with Provost and Deans to set fundraising time targets for Deans, where dedicating 20 percent to 25 percent of their time is standard and recommended. To accompany the official quarterly Advancement meetings with Deans, we also recommend an annual Advancement and Deans’ retreat to evaluate successes and failures and refresh the commitment, strategy and tactics of fundraising together for the next year. One critical step to ensuring smooth collaboration is for Advancement’s college-oriented Directors of Development to have meaningful face to face time with Deans and faculty, and to participate appropriately in college strategic planning without becoming responsible for execution of college-based events or other logistics. This approach should be customized between each Dean and their Director of Development.

As for the Advancement related volunteer Board’s (Alumni and Foundation), CWU should continue to invest in the diversity of their Board makeup including by race, age, gender, experience, financial capacity, and community networks. Each Board member should be fully-invested in the institution by giving of their time, resources and support. Additionally, CWU’s volunteer Board’s will need to both apply leverage on the institution’s internal decision makers to address vision, investment in capacity and cross-university communications concerns, and invest their own financial resources into the operations function of Advancement.

4. Alumni Relations

A. Best practices. Successful contemporary alumni relations program follow several key principles and practices in their structures, strategies, and tactics.

First, Alumni Associations demonstrate value to students before they graduate, and demonstrate value at all points in the student and alumni lifecycle, beyond social opportunities or simple identity as a CWU alumnus. Examples include:

- Ability to join the Alumni Association before graduation.
- Relevant pre-graduation programming that demonstrates social and professional value, and demonstrates the value of alumni association participation after graduation.
- Relevant post-graduation programming that builds value for alumni and that recognizes and leverages their specific affinities and affiliations.
- Relevant practical benefits that save alumni time or money in their daily lives.
- Year-round career and networking-based events and services, including matching alumni mentors with current students in similar fields.
- Particular emphasis on connecting alumni and current students by college affiliation and major affinity during major campus-wide events like Homecoming or reunions.

Second, they have a diverse Alumni Association Board whose members have varying skillsets and expertise. They not only represent a range of ages and graduation years, but also reflect a variety of affiliations and affinities with their university. The presence and strength of an
Alumni Association Board is a key factor of success in helping design strategies to engage the constituency they represent, particularly for universities preparing for a significant campaign.

Third, Alumni Relations programs ideally engage in strong strategic partnerships with colleges within the university. These partnerships serve several functions:

- They help identify the proper affiliations and affinities for Alumni Association members and Annual Fund donors for fundraisers to build strong engagement and giving programs around.
- They keep both of these branches of Advancement informed about exciting opportunities within the colleges for alumni and prospect cultivation.
- They create opportunities for collaborating on best practice, on-campus alumni and donor engagement by affiliation and affinity within colleges, such as alumni luncheons at Homecoming that put the work of the college on display, or networking and mentorship events connecting alumni who studied and have careers in similar fields.

Fourth, high-performing Alumni Relations programs make use of existing and emerging technologies. If university alumni are as successful as hoped for after graduation, they will necessarily be spread out geographically, and Alumni Relations staff can’t rely on geographic proximity when planning engagement strategies. Thus, investment to harness the organizing and relationship-building power of the internet is necessary for these programs to succeed. A great example of a best practice in technology is Washington State University’s use of Brazen, an online real-time connection tool that they use for virtual alumni happy hours and discussion sessions with WSU professors and leaders.

Other structures in Alumni work are also important to consider when creating a program based on best practices. Traditional alumni affairs programs leverage a regional chapter model to maintain relationships with alumni who do not live near campus. But, recent graduates, current students and the generations that follow are not “joiners” in the way previous generations were, and the internet makes it easier to organize alumni without a geographic presence. Many high-functioning Alumni Relations programs are doing away with chapters for these reasons, but it’s important to note that a chapter-based model can still be an effective and necessary tool for organizations like CWU that are ramping up alumni work. But they must be combined with a knowledge and willingness to provide programs by specific affinities and affiliations within each chapter, and with significant online engagement practices that cut across chapter or affinity lines. Additionally, committed volunteer leadership is an essential ingredient in chapter success.

An ideal Alumni Relations program recognizes that the relationship with Alumni is a two-way street. It doesn’t just push information out to Alumni that may convince them to support the university; it genuinely engages them in a dialogue that attempts to understand what matters to them, and how the university can help them succeed in what matters most.

Finally, an ideal Alumni Relations department is allowed within the culture of philanthropy of the university to focus strategically and specifically on alumni work, and work that captures student interest in an alumni relationship before they graduate. Particularly in the emerging or
startup phase, Alumni Relations staff should not be primarily responsible for work, programs or events aimed mainly at current students. But – they need to be at the table for conversations around how to build Alumni Association engagement opportunities into that existing programming.

B. Our Findings. Overall, we found that CWU’s alumni relations work is on the right track. Alumni Relations’ sub-unit strategic plan is a firm foundation for the growth planned for the next five years.

CWU meets some, but not all of the best practices around providing value to alumni:

- Some events and many of the benefits of Alumni Association membership provide daily value, including access to job search listings, insurance and other discounts.
- The Alumni Relations strategic plan includes opportunities for connecting current students to alumni.
- But, students cannot currently join the Alumni Association before they graduate, and there is no pre-graduation programming for current students.

CWU’s Alumni Board is in a state of growth and transition. Some long-term members remain, but many are new and still coming to understand their role and understand how to apply their skills to board work. Despite their short tenure, these newer members of the board and other members appear to be responsive to the needs of staff. However, the lack of appropriate staffing levels and the opportunity cost of non-Alumni Relations work placed in the department currently prevents the Alumni Relations staff team from leveraging the Alumni Board to its fullest.

We find that CWU’s Alumni Relations program is headed in the right direction with its plans to build further strategic partnerships with the colleges. This activity will continue to bear fruit as the Alumni Relations team builds up its operational capacity affording it more time and resources to better grow these important relationships. Additionally, Advancement leaders continue to make headway on building relationships with new Deans not only for the purposes of Alumni Relations, but for Annual and Major Giving as well.

We find that CWU is shifting towards best-practice technologies that can help shepherd and grow alumni relationships to the university.

- The upcoming deployment of the Amplo online alumni engagement tool to replace the outdated and time-intensive NetCommunity tool is a strong choice as Alumni Relations gears up for significant alumni engagement in advance of a potential campaign.
- Overall Advancement technologies are solid – Raiser’s Edge is a powerful tool for fundraising. But, reporting has many challenges, as noted previously.
- However, the implementation of the Financial Edge companion product has been extremely challenging, creating reporting issues for Alumni Relations that also affect the other sub-units of Advancement and thus all of CWU’s schools and colleges.
CWU’s revenue model for the Alumni association follows the more traditional structure of membership dues.

- Current membership options include an annual ($35), 10-year ($350), lifetime ($600), and lifetime recent graduates (of 5 years or less, $550) rate.
- The first year of Alumni Association membership is free – an excellent incentive for early membership.
- But, recent graduates are not opted in automatically; they must proactively claim their first free year of membership.

CWU uses a chapter model to accomplish some relationship-building with alumni in different regions. The current plan calls for expansion of this model into more new chapters and building specific programming to grow their relationships. This model fits well with Alumni Relation’s current status and planning and but will need to continue adapt to new and innovative technologies and affinity based programming.

We find that CWU has not yet activated a long-term two-way conversation with alumni at the best practice level. Tools like alumni surveys are a good start, but true engagement must find its way into every activity that the Alumni Association programs. The intention to do so is embedded within the new Alumni Relations strategic plan, and new staff are beginning to imbue their work with this value, but greater success will only come with increased investment in the team’s capacity.

C. Our Recommendations. We offer several practical recommendations for CWU to fortify its Alumni Relations work in preparation for a significant philanthropic campaign that will draw upon Alumni support.

First, we recommend that CWU pursue more career-relevant activities and programs and limit energy spent on purely social programs, as outlined in our best practices above. Some of these are featured in the Alumni Association strategic plan, and we urge the institution to focus on these affinity-based activities above more transactional, sporting event or campus access benefits. We also urge CWU to focus on creating relationships between current students and Alumni. CWU’s current alumni are the role models for current students; programs that showcase what they have accomplished (like an Alumni affinity-based speaker’s series) and what they can offer as mentors to current students will give CWU a head start on their relationships with future generations of alumni.

We recommend that CWU pursue a needs assessment of the Alumni Association Board, investigating what useful skills and expertise are represented on the board, and what necessary expertise may be missing. After this assessment, CWU should:

- Continue to recruit the right new Alumni Association Board members that add value in areas identified in the needs assessment.
- Provide ongoing training and support to them in their role as alumni representatives, community builders, philanthropic leaders by example, and governors of the Association.
Create a Board mentorship program that pairs long-time board members with new members for their first year on the board, offering support and guidance in their roles.

If reporting and financial management for Alumni Relations and other areas of Advancement continue to be a challenge with the Financial Edge, we recommend investing in an established Blackbaud specialist consultant to solve the issues. These problems created by these issues echo throughout the entire unit and university, affecting internal trust and the external constituent and donor experience. Fixing them should be a high priority, as should investment in any other engagement or other technology tools that Alumni Relations staff identifies as a need. Digital engagement is now too critical to success in connecting with alumni of all ages, not just recent graduates, to underfund it.

Ideally, over the course of the next 5 years, we would recommend that CWU’s Alumni Relations program decide between a dues-based membership model and an opt-out membership model that forgoes dues in favor of a revenue-neutral relationship-based focus.

What this would look like:

Dues-Based Membership Model:

- Continue to develop meaningful member benefit options that focus on career, networking and affinity based programming.
- Create an open line of communication with alumni members to allow for continuous feedback and improvement ensuring alumni members are experiencing value for their dues investment.

Opt-out Membership Model:

- As soon as a student completes two terms at the institution, enroll them in the alumni association without fees or dues, and keep association membership free and automatic.
- This two-term detail is crucial; because many CWU students transfer in from community colleges and spend 2 years or less on campus, CWU has less time to build affinity with many students than other institutions do. The earlier CWU can create a pre-graduation, non-transactional relationship that demonstrates value to these students, the more successful its Alumni Relations program will be.

We observed significant revenue concerns within the unit and recognize that CWU will need to keep the earned-income model until such time as a more significant investment is allotted for Alumni Association programming. As it stands, revenue produced through the current dues model is being used to grow the program. As a campaign approaches, it is much more important to invest in generating as many positive alumni relationships as possible.

We recommend CWU create a Student Alumni Association that engages current students and generates future leaders while still on campus.

We do believe that it is worthwhile for CWU to maintain a chapter structure during the early stages of its effort to revitalize its Alumni Relations program to accompany its solid new digital
engagement efforts. But the chapter model is only as good as the volunteers recruited to help run and engage chapters, and experimentation will be necessary to understand how chapters truly thrive. In order to maximize the impact and minimize the strain of this model, we recommend:

- Create quantitative and qualitative success metrics for each chapter, allowing CWU to prioritize chapters with the most success and divest from chapters not bearing fruit.
- Create a training and orientation program for chapter volunteers that outlines expectations and provides resources and support for them.
- Begin or refresh chapter work in Northwest region, including rebuilding a Seattle presence in the next two years. We believe the previous Seattle Advancement office attempt was not successful because the right people were not in place. With the right staff and volunteers, the Seattle office could thrive and provide much value to CWU.
- After perfecting the regional model in Seattle, Eastern Washington and Oregon, expand chapters to more diverse geographies if alumni demographics demonstrate opportunity farther away from CWU.
- Build affiliation and affinity strategies into chapter work from the ground up. If CWU finds that certain locales have an abundance of alumni in specific careers, hone the work of that chapter to focus on those fields.
- On membership forms, ask alumni what affinity and affiliation activities they are interested in – capturing that information upfront can shepherd them quickly into the right Alumni Association programs. When CWU reaches the point of opting students in automatically, pre-select chapters, affinities and affiliations for them based on their locale and academic interests or degrees; provide frequent opportunities for them to update this information.

Our recommendations to help CWU continue to embed true dialogue with alumni into its activities include:

- Standardizing the practice of regular student and alumni surveys
- Specific invitations for focus-group type conversations throughout the year
- Open-door policies for alumni with Alumni Relations staff during campus-wide events like Homecoming
- Alumni summits or panels during campus-wide events like Homecoming

5. Annual Giving

A. Best Practices. An ideal annual giving program casts a broad net to identify and cultivate as many interested potential donors as possible. In tandem with strong alumni work, it is the main source of acquisition of new donors and relationships that can be further cultivated for major gifts. A healthy annual giving program features:

- Segmentation of audiences by relevant affiliations and affinities, such as graduation year, college of graduation or specific degree program, academic and athletic interests, demographics, and status as or relationship to current or former students.
• Customized messaging for each segment that stems from the larger communications strategy and identified development messaging.
• Dedicated staff for communications.
• A solid foundation of giving and affinity data that affords staff the capability to segment and customize solicitation and stewardship mechanisms.
• Collaboration and partnership by annual and major giving staff with deans, faculty members and student support staff to generate needs messaging, impact stories, and creative opportunities for cultivation and stewardship of existing donors.
• Accountability metrics for the college deans so they know if they are meeting expectations, and an annual collaborative approach to evaluating progress.
• Diverse outreach mechanisms, including events, direct mail, email, social media and call center.
• Consistent and frequent multi-channel outreach for cultivation, solicitation and stewardship that reflects both general fundraising messages and specific affinity-based messages for specific segments – including multiple solicitations over the course of a year.
• A commitment to evaluation of program effectiveness, including dollar and donor metrics analysis, donor surveys, and split testing of key messages, different formats, strategies for calibrating ask amounts, and calls to action.
• Collaboration between annual giving staff and major gift officers on prospect identification, pipeline development strategies, and moves management of specific prospects.
• Reasonable goals for growth.
• Encouragement of current students to begin giving before they graduate, such as a class gift program. This includes creating a sense of urgency around current student giving, through mechanisms like an annual competition to give more by Commencement than the previous graduating class achieved.

Annual fund events should leverage the existing university and college event calendars to build opportunities to daylight the need and impact of philanthropic support and engage low-level donors. Event resources should be spent on events that can meet multiple goals of the development department – such as helping further qualify existing donors and their relationship to the university while cultivating their future participation. Some examples include:

• Building donor receptions into pre- or post-athletic event schedules to capitalize on alumni and supporter presence at popular athletic events.
• Leveraging faculty with exciting and relevant research to present their work to donors above a specified giving level at Homecoming, with refreshments and Q&As.

Annual Fund messaging ideally benefits from significant collaboration with deans, faculty, and other “content experts” in the university system who are responsible for helping the university meet its educational mission. This is part of a healthy culture of philanthropy, as these stakeholders in other departments are often the key to identifying the impact stories and funding needs that form the basis of effective persuasive donor communications. For example:
• Appeals that tell the story of a single student’s journey at CWU and their life after graduation, and ask for unrestricted support to help reproduce those results for current students.
• Appeals that tell the story of how research, training or education at CWU has affected real-world outcomes, and ask for earmarked support to meet related funding needs.
• Call center messaging that tells the stories of what is happening on campus in specific departments, based on briefings from college deans and campus life staff.
• Social media posts and email appeals that use video and photography of classrooms, research facilities, or practical labs to capture CWU’s mission in action and point to future outcomes at stake.

B. Our Findings. Measuring CWU’s annual giving program against best practices, we find:

• CWU segments audiences by relevant affiliations and affinities where possible, but there are significant challenges in the integrity of its giving and affinity data that prevent staff from soliciting and stewarding donors by relevant segments. An example is the Valentine’s Day email campaign for double-CWU grad couples; a great creative idea, but hampered by an inability to identify all the couples that qualify.
• CWU has begun to effectively leverage Ologie messaging into customized messaging for different segments and audiences.
• CWU has dedicated staff for annual giving operations, but does not have dedicated staff for donor communications.
• Collaboration and partnership with deans, faculty members and student support staff has historically been challenging, but current Advancement leadership are making solid headway in improving these relationships.
• CWU has an appropriately diverse suite of outreach mechanisms, including events, direct mail, email, and its call center.
• CWU has frequent but inconsistent multi-channel outreach for cultivation, solicitation and stewardship; without a communications plan and annual giving tactical plan, it lacks direction.
• CWU has data challenges and capacity issues in Advancement Services that frequently complicate stewardship attempts; for example, the lack of dedicated gift processing staff often results in delayed or incorrect donor acknowledgments.
• CWU’s development team strategic plan shows a strong commitment to evaluation of program effectiveness, including dollar and donor metrics analysis and donor and alumni surveys, but does not appear to split-test (e.g. testing one message against another to a particular audience) for effectiveness.
• CWU’s annual giving staff and major gift officers collaborate inconsistently on prospect identification, pipeline development strategies, and moves management of specific prospects, in part due to challenges with the supporting donor data and lack of capacity in their jobs.
• CWU’s five-year metrics and growth targets are reasonable if the data challenges and challenges in collaborating with other areas of the university improve over time. Without these improvements, meeting these goals will be very difficult.
• CWU’s annual fund messaging has dramatically improved with the recent debut of Ologie branding and messaging, but collaboration challenges with other areas of the university still challenge Advancement’s ability to tell mission-centric impact stories to donors.
• These same challenges also often thwart the effectiveness of on-campus events that can be leveraged for annual giving purposes.
• CWU’s Development Plan intends to establish accountability and tracking mechanisms so they can measure the effectiveness of college Dean and faculty assistance.

C. Our Recommendations. Our recommendations on annual giving focus on addressing key themes of intra-university collaboration, planning, and data.

As noted above in the Planning section, we recommend the creation and execution of a comprehensive multi-year annual giving plan, and within that, strong single-year annual tactical fundraising plans. These plans should define:

• Specific goals and metrics for participation, dollars raised and more, based on reasonable stretches from past actuals.
• Specific campaign and appeal timing based on observed patterns in donor behavior
• Specific audience and affinity segments and key messages appropriate for each, with mechanisms to evaluate message and outreach mechanism success.
• An integrated calendar for all types of outreach mechanisms, including events, hard copy communications, electronic communications, and the call center. This calendar should note and leverage special occasions and milestone events in the life of the university for the creation of specific campaigns or engagement efforts.
• An assessment of other resources and assets needed to carry out the plan.

To echo our recommendations from Alumni Relations, we urge CWU to invest in resolving the challenges of process and data integrity in Raiser’s Edge and reporting in Financial Edge. This will increase the effectiveness of best-practice affinity strategies and segmentation tactics in the long term.

In tandem with Alumni Relations, we recommend that CWU create a current student giving program and recent alumni giving program. These efforts will build a culture of giving long before most alumni have significant funds to contribute, and the behavior will become ingrained by the time they do have capacity. Use competition between graduating classes and between colleges to drive pride in giving.

Many of the recommendations made in the Culture of Philanthropy section above will greatly improve the collaboration challenges we have noted that affect annual giving work. In addition, specific annual giving-related collaboration recommendations include:

• Bring Deans in to help shape messaging for call center fundraising efforts; their enthusiasm and passion for their college can translate to much more compelling messaging, and motivate student callers by putting a personal face to the needs and problems their fundraising calls will help solve.
• Identify geographic pockets with a many annual fund donors and take the Deans on the road to speak there once per quarter. These events will further qualify existing annual fund donors and steward their current gifts, and buttress the chapter-based model of the Alumni Association.

We heartily encourage CWU to invest in dedicated communications staff to create and manage a unified communications plan for all Advancement activities, including the annual fund. The lack of a unified Advancement communications voice affects the entire program from top to bottom, and will further leverage the already significant investment in new messaging and communications directions with Ologie. Without a staff member to drive and own it, this investment cannot be maximized.

6. Major Giving

A. Best practices. If annual giving casts a broad net to acquire as many donors as possible and cultivate them for increased giving over time, the role of major giving is to leverage the relationship with and capacity of the donor to invest more fully in the university’s grander vision and broader objectives.

An ideal major giving program features:

• One-on-one relationship building by major gift officers and university leadership, with data and staff time supporting the identification, qualification, cultivation, solicitation and stewardship of major donors.
• A strong commitment to moves management and stewardship strategies on a prospect-by-prospect basis, including contact report documentation.
• Portfolios structured to include time spent on discovery, early- and mid-cultivation prospects, and prospects ready for proposal. Below, we will recommend an ideal portfolio balance for CWU’s major giving officers based on its current staff structure.
• Major gift officer metrics including face-to-face visits, proposals submitted, gifts and dollars raised and more.
• Expectations for college-based fundraising set appropriate to the nature of college constituency. For example, expectations for portfolio size and dollars raised for the College of Business may be calibrated at one level, while expectations for the College of Education should be set very differently – because teachers don’t typically have as much earning potential as businesspeople.
• A collaborative approach to relationship development and strategy between advancement staff when prospects have multiple affiliations or affinities within the university.
• Deep collaboration with Deans, faculty, Athletics and other “content providers” of the university as noted in the Culture of Philanthropy section above, in order to create custom access and strategies to support donor moves towards a gift.
• More specialized custom events by college or affiliation, providing deeper access and engagement to donors at higher levels than annual fund or alumni events. For example, major donor call-in sessions via conference call, featuring thought leaders on different
topics from the colleges that invite donors into the mission of CWU and shed light on funding needs.

B. Our Findings. We find that CWU’s major giving program is solid. Many best practices are in place, and some practices need minor adjustment. In general, the annual fund efforts that feed and provide prospects to major giving need more adjustment to generate major gift success than the major gifts program itself.

- The one-on-one relationship-building cycle is adequately resourced for each college at current staffing levels given current funding goals.
- Directors of Development are assigned portfolios of both a college and a region, a structure which will likely not prove tenable in a future campaign scenario.
- The new Development sub-unit strategic plan contains a strong commitment to tracking and evaluating progress based on robust and appropriate metrics.
- If CWU truly has a proactive, prospect-by-prospect moves management system and plan, this approach must be crystallized in finer detail in the team plan and individual major gift officer workplans.
- Cultivation events, insider access and other points of major gift work that result from collaboration with other areas of the university suffer from the same collaboration challenges echoed in the section on Culture of Philanthropy, and need improvement.

C. Our Recommendations. We suggest the following to move CWU closer to best practices in major giving as it prepares for a major campaign.

- As the potential campaign approaches, and improved alumni and annual giving work generates more qualified major gift prospects, CWU should add a regional major gift officer based in Seattle as a first step (where there is already a significant number of CWU alumni) to allow the existing Directors of Development to focus purely on alumni in their colleges. As the regional program demonstrates success, additional regional gift officers and/or Alumni Relations officers could be added to other, high-density CWU alumni areas.
- In the meantime, Directors of Development should focus more on prospect identification and qualification by college affiliation instead of prospecting in assigned regions. Affiliation has proven to be a far stronger connector when it comes to relationship building efforts and the Alumni chapter work by region can pick up any prospect identification slack that the loss of not having assigned regions will generate. Additionally, close collaboration with Alumni Relations staff will help identify the hottest regional giving prospects, allowing for more efficient DOD travel, when it occurs.
- In light of the lack of discovery officers in the development team, major gift officer portfolios should be allocated as follows: 30% discovery (qualified prospects who have not yet connected with Advancement beyond an annual fund gift), 40% early & mid cultivation (those who are currently engaging with Advancement after previous gifts) and 30% ready to solicit/proposals pending (those who have been asked but not closed, or who need more information to commit to a proposed gift).
• Ensure that contact reports are filed in a timely and detailed fashion, and shared freely with other members of the Green Team.
• If more resources become available in the future, we recommend adding discovery officers to the team to serve as a proactive bridge between annual and major giving to build a continual pipeline of major donor prospects.
• We recommend that CWU pursue the recommendations previously noted on increasing collaboration and creating a healthier culture of philanthropy, which will also drive towards greater success in major gifts. For example, working closely with Deans and faculty to invite them to participate in conversations with donors at all stages of the moves management lifecycle.

7. Planned Giving

A. Best Practices. Because planned giving is the least reliable and predictable source of donations for universities and nonprofits, the very presence of planned giving work can, but does not always, indicate a high degree of sophistication and refinement in a fundraising enterprise. Only organizations achieving their goals in more predictable revenue areas can successfully absorb putting effort into a fundraising strategy that, by definition, generates revenue through factors almost completely outside its control. Planned gifts can be a significant contributor to a major campaign, and organizations preparing for a campaign should ensure they have a solid foundation in this area. Best practices in planned giving include:

• Training major gift officers in baseline knowledge of bequests, including cash, insurance, retirement accounts, real estate, and other property that may be legally donated.
• Training major gift officers to ask the right questions of planned giving prospects in sensitive situations, and to know when to recommend or deploy other resources, like estate attorneys or financial planners.
• An active outbound prospecting emphasis on loyal annual fund donors as well as major donors with known high capacity. Longevity and loyalty are two key factors in identifying prospects who will ultimately commit to a planned gift.
• Passive inbound lead generation mechanisms to complement proactive prospecting strategies, like the inclusion of a checkbox that says “Yes! I want more information on leaving a gift to CWU in my will” on annual giving forms, pledge forms, Alumni Association forms, and other indicators of donor intent or participation.
• Requests and proposals that focus on securing a percentage of an estate rather than a specific dollar figure.
• Leveraging existing bequest donors to create social proof to persuade current annual or major donors to add a bequest to CWU in their will.
• Specific recognition mechanisms for bequest donors to honor their commitment, such as legacy societies or name plaques on capital assets.
• Where appropriate, a relationship with a consultant like Stelter to outsource the development of a planned giving website or other planned giving marketing content.
• A thoughtful gift acceptance policy covering all types of planned gifts.
B. Our Findings. In general, we find that while CWU’s advancement team has the basic infrastructure to support planned giving, it is still working towards the predictable success in annual and major giving that allow CWU to spend significant energy on planned giving. Capacity issues and immediate revenue needs mean that planned giving, along with stewardship, has taken a back burner to other, more reliable revenue mechanisms.

- Major giving staff report that they do not have enough capacity to regularly prioritize planned giving work over other portfolio areas.
- Existing bequests have materialized through add-on planned gift solicitations to existing major gift work rather than through a concentrated effort to identify bequest prospects.
- A Legacy Society is mentioned on the University Advancement website – but the portal to CWUgift.org linked to through the Planned Giving section is broken.
- The online giving form and past hard-copy gift forms do not include inbound planned gift lead generation checkboxes.
- CWU has not recently focused on creating or revising quality planned giving marketing materials.
- CWU does not have a gift acceptance policy covering all different types of gifts.

C. Our Recommendations. Without adding dedicated planned giving staff, it will be difficult to envision how CWU will make substantive progress to this area, though a dedicated Advancement communications position could certainly be used to increase targeted communications to prospects identified through CWU’s predictive modeling work. Ultimately, though, we recommend that a campaign include an in-house planned giving officer, working with both annual giving and major giving officers. Until that level of investment is possible, we can recommend several changes that will put CWU on the path to a solid planned giving program without adding staff in this area.

- Fix technology issues that make planned giving information difficult to find on the University Advancement website, like broken links.
- Schedule an annual 2-3 day mini-retreat or “sprint” for annual and major giving staff that focus on looking at their giving portfolios through the lens of planned giving. Spend days 1 or 2 of the sprint on prospect identification, and days 2 and/or 3 on working moves toward a planned gift into the current moves management plan for each identified prospect.
- Ensure major gift officers have sufficient training in the delicate conversations around end-of-life concerns and know how to direct donors to supportive resources.
- Find several current planned giving donors and highlight their story of deciding to leave a legacy for CWU in current planned giving materials. In the absence of dedicated staff to drive work, simple peer proof and leadership by example in marketing materials where possible will add fortify efforts significantly.
- Include inbound planned gift lead generation checkboxes on all forms for online giving, hard-copy donations, Alumni Association membership, and more.
- Craft a gift acceptance policy that covers all types of planned gifts.
- Develop strong recognition mechanisms for planned gifts, such as highlighting estate donors in regular Advancement newsletters or other communications.
Host a planned giving or financial planning forum with an outside investment advisor in person at campus-wide alumni events, and electronically through webinars. Specifically invite all alumni above age 40 to attend. This not only provides a service to potential planned donors, it spurs them to start thinking proactively about their legacy through a CWU framework.

8. Foundation & Corporate Giving

A. Best Practices. Foundation and corporate giving is similar to major giving – it is primarily about making a match between specific funding needs critical to the university’s progress and the funding scope and interests of corporate and foundation grantmakers. Additionally, best practice corporate giving work must investigate not only grant-based funding, but potential sponsorships, partnerships or cause marketing efforts with corporate community relations or marketing programs, as many corporations are investing funds in these more flexible, business-like partnerships alongside or in place of rigorous granting programs.

Best practices for grant-based foundation and corporate giving work include:

- Staff that have deep knowledge of the university’s needs, programs, strengths, and outcomes
- Collaboration with Deans, faculty and other “content providers” of the university to identify funding needs and develop and refine specific proposals.
- A schema for prioritizing and pursuing internally identified funding needs within the overall university culture of philanthropy
- Robust research into funders and their priorities, refreshed on a quarterly basis
- Robust and specific evaluation metrics for the giving portfolio, such as proposals submitted, success rates, dollars raised, and more.

Best practices for partnership-based corporate giving work include:

- A schema for prioritizing and pursuing internally identified funding needs within the overall university culture of philanthropy
- Identification of potential corporate partners from other mission-related university relationships. For example, economic development or research partnerships between universities and corporations can create a strong foundation for philanthropic commitment. A great example is WSU’s partnerships with Alaska Airlines on alternative jet fuel research, which they have leveraged into greater philanthropic investment from this key regional corporation.
- Identification and research into the corporate affiliations of existing major donors, who may be willing and able to connect CWU with corporate funding decisionmakers.
- A system for internal institutional and major giving collaboration around including corporate connections in moves management plans for individual major donors with significant corporate affiliations.

B. Our Findings. We find that CWU’s grant-based corporate and foundation giving efforts are solid. Staffer Jeff Ellis has the right training and background for this work, and navigates its
collaborative requirements well. He has a strong focus on metrics and telling the story of CWU through both data and personal impact stories. However, current staffing levels would not be sufficient for the increased activity of campaign mode.

C. Our Recommendations. To prepare for a significant campaign, we make several recommendations to CWU in the area of foundation and corporate relations.

- Refresh grant funding and university corporate relationship prospect research on a quarterly basis.
- Commit to the changes noted above in the section on culture of philanthropy, which will affect corporate and foundation work as much as major and individual giving.
- Explore potential corporate partnership prospects in close tandem with other units of the university that hold those relationships. This could be accomplished by hiring a dedicated corporate relations position or corporate non-grant related prospects could be added to Director of Development portfolios.
- Confirm the funding need prioritization schema with key campus stakeholders on an annual basis.
- Collaborate closely with major giving staff to identify and track the corporate affiliations of major donors and major gift prospects and integrate the investigation of those relationships into each donor’s moves management plan.

9. Internal Staff Structure

Based on the best practices, observations and recommendations laid out above, we recommend two layers of changes to Advancement staff. First, a layer of immediate changes to support the immediate recommendations we lay out above to prepare for a significant campaign; and second, a layer of long-term additions and changes to support the campaign itself.

A. Immediate Staff Investments for Campaign Preparation (next 1-2 years)

- Communications. Add a full-time dedicated Communications Manager or Director to drive communications for all Advancement sub-units.

- Alumni Relations. Rehire the open position formerly occupied by Jody Baxter, and focus the role on membership management, including affinity and chapter strategies. And, hire a new program position focused on student engagement activities and administrative program and event coordination.

- Advancement Services. Hire a full-time dedicated gift processor and remove gift processing responsibilities from the other roles in the department. The failure or success of this core function reverberates throughout the Advancement enterprise, and it is not successful under the current structure. Focus the Advancement Services Coordinator role on non-database advancement technology services that support the incipient increase in alumni engagement strategy and in digital communications unit-wide.
B. Long-term Staff Investments for the Campaign Phase (next 2-4 years)

- **Development/Green Team**
  - Add a Chief Development Officer to manage the day to day work of the Green Team and expand the strategic capacity of the Associate Vice President of Advancement.
  - Add a discovery officer to the Green Team.
  - Add regional major gifts officer(s) as warranted to the Green Team.
  - Add a planned giving officer to the Green Team.
  - Add a staff member to corporate partnership work, allowing the Director of Corporate and Foundation Relations to focus on the grant work that will play a greater role in a campaign than corporate cause marketing or sponsorship gifts.

- **Alumni Association**
  - Add regional alumni reps in CWU alum-dense areas (PNW and beyond) as warranted by strategy and planning.

C. Other staff recommendations

- Continue to directly and quickly address personnel challenges to send a strong message to staff that they are supported and valued.
- Leverage Human Resources office for specific recruitment more regularly. They note success scouting talent from similar institutions in similar size towns and environments. This is a potential avenue for recruitment.
- The Human Resources office should be a key partner for staff training and retention as well. Encourage all staff to take advantage of human resource led trainings and offerings. Give credit for professional development, perhaps through CLAonline, within quarterly and annual reviews at all levels.
- Hire the right people and allow them space in their jobs to execute well – including removing activities and responsibilities that distract from the top identified priorities.
- Focus on strong operations without letting things fall through the cracks. Adopt strong processes with documentation, and ensure backup training for core processes to ensure the potential for work-life balance and time away from the office.
- Build stronger operations before campaign and invest in operational capacity, not just leadership and green team.
Ariel Glassman’s areas of expertise include 360-degree development operations, strategic and tactical development planning, donor communications, talent management and growth, board and volunteer management, and annual giving and events. Her past clients include the Alliance for Education, Crosscut Public Media, ACT Theatre, City Year, Central Washington University, Bellevue Arts Museum, The Creative Advantage, and OneWorld Now! She has also served as class fundraising chair for her alma mater Stanford University.

Ostara founder, Kyle Halmrast, has been active in PNW/West Coast fundraising for nearly 20 years. Having held lead development roles in many of the region’s most recognized non-profits, including UW Medicine, Woodland Park Zoo and the Sierra Club, he understands the area’s philanthropic milieu well, and has expertise in all aspects of non-profit fundraising, from $100M campaigns to annual giving programs and events.

Rebecca Zanatta graduated from Washington State University with a BA in organizational communication and holds a MEd in higher education administration from the University of Idaho. She completed her Certificate in Fund Raising Management (CFRM) from the Indiana University School of Philanthropy and has consulted with non-profits on their fundraising strategies; including generational giving, social media and volunteer management programs. Rebecca is the Immediate Past President of the Northwest Development Officers Association (NDOA).