Report:	Assessment Plan Details for: • Vice Chancellor for Institutional Advancement
	Report Generated by TaskStream
Workspace:	Operational Plan & Assessment Report - OPAR
Assessment Plan:	2010-11Cycle: Assessment Plan and Assessment Findings
Assessment Plan Template:	OPAR Assessment Plan
Report Generated:	Friday, February 25, 2011

Measures and Findings

VC for Institutional Advancement Unit Goals 2010-2011

1. Ensure appropriate resources are provided

1.1. Provide appropriate resources

Mapped to:

- FSU Strategic Priorities, Initiatives, and Indicators: 1.1.4., 1.2.4., 1.3.2., 1.3.4., 1.4.1., 2.5.3., 4.1.3., 6.3.1., 6.3.4.

Measures & Findings

1.1.1. Ensure goals and objectives are being reached

Details/Description: During each evaluation period throughout the calendar year, the Vice Chancellor will look at each unit's goals and objectives to ensure that goals are being reached. The use of reports of current giving will be analyzed to determine success in particular areas. (Annual Fund, Major Gifts, Corporate & Foundation Relations). We will also compare giving reports from last fiscal year to determine rates of growth & success as compared to last fiscal year.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 1.1.1. Ensure goals and objectives are being reached

Summary of Findings: Mid Year Analysis: At this point in the year we have experienced outstanding growth in the area of alumni giving. We will continue to focus on increasing the rate of proposals submitted to foundations on a monthly basis. We are extremely challenged in the area of corporate relationship development due to the limited corporate resources in our region.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

Gift Summary Report (Excel Workbook (Open XML))

This report summarizes our giving among various constituency groups.

1.1.2. Prospect Management

Details/Description: Prospect Management: we will look at the number of prospects that each staff member has been assigned and the amount of cultivation and relationship management that has taken place for each individual prospect. The number of proposals that have been submitted for consideration to various corporate and foundation entities will be also be a crucial consideration in determining the success of our corporate and foundation relations unit.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 1.1.2. Prospect Management

Summary of Findings: Mid Year Analysis: We continue to experience growth in the area of prospect management. We have added additional resources to our options of researching potential partners such as Alumni Finder which provided us with the opportunity to verify addresses and basic bio information about our graduates. We have also subscribed to the Foundation Center which provides a wealth of knowledge surrounding Foundations on a national level.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

2. Create an integrated marketing approach campus-wide

2.1.Integrated marketing approach & branding study

Mapped to:

- FSU Strategic Priorities, Initiatives, and Indicators: 1.1.1., 1.1.3., 3.3.1., 3.3.2., 6.3.2.

Measures & Findings

2.1.1. Branding Study

Details/Description: Completion of branding study by conclusion of fiscal year with a plan of implementation prepared for the approval of the Chancellor and Board of Trustees immediately following conclusion of study.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 2.1.1. Branding Study

Summary of Findings: Mid Year Analysis: We are on target for where we wanted to be at this point in the year with our branding study. During the last couple months, various focus groups were formed to provide input and suggestions for their view of FSU as a university and economic engine in our region. A report has been produced and will be distributed by the end of February. A survey was produced and sent to all participants in the focus groups.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

Branding Study Survey Results/Overview (Adobe Acrobat Document)

2.1.2. Filtering publications through the Office of Marketing

Details/Description: Evaluate the effectiveness of procedure that will mandate that all documents produced for public viewing are filtered through the Office of Marketing. University publications and related documents should all have a consistent message and represent the guidelines of our branding, logo placement, and aesthetics.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 2.1.2. Filtering publications through the Office of Marketing

Summary of Findings: Mid Year Analysis: All units across campus are utlizing the approval process implemented by the Office of Marketing & Events. At this point in the year, our progress has been successful and we feel confident that materials produced by the university are receiving adequate attention and that logo usage is appropriate and consistent with the image of the university.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

3. Analyze the functionality of the FSU Foundation

3.1. Work collaboratively with the Foundation Board officers

Mapped to:

- FSU Strategic Priorities, Initiatives, and Indicators: 1.1.4., 1.2.4., 1.3.2., 1.3.4., 1.4.1., 2.5.3., 4.1.3., 6.3.1., 6.3.4.

Measures & Findings

3.1.1.Survey and interview board members

Details/Description: Survey and interview board members, review meeting minutes, policies and procedures. Development of a strategic plan and educating board members about the components of the plan.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 3.1.1.Survey and interview board members

Summary of Findings: Mid Year Analysis: This continues to be a challenging area for our division. In order to meet the needs of the Foundation Board and ensure that they are a beneficial to the university and the FSU community, a Title III Position is currently in the approval process and this person will provide much needed support in this area.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

3.1.2. Develop committee structures

Details/Description: The development and maintenance of committee structures that will allow the Foundation to function more effectively will be the means of success for this component. Committees have been formed and are meeting regularly. The remaining committee that needs assistance is the Nominating Committee. Recruitment of members that will enhance our board and work collaboratively with the university is a requirement and the nominating committee should be the committee to focus on this objective.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 3.1.2. Develop committee structures

Summary of Findings: Mid Year Analysis: The Foundation Board Committee Structure has been implemented and members of each committee have been recruited. Meetings will begin to be held during the month of March.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

Committee Structure (Adobe Acrobat Document)

Outline of committee structures

4. Engage alumni to create stronger partnerships

4.1. Engage alumni with the university

Mapped to:

- FSU Strategic Priorities, Initiatives, and Indicators: 1.1.4., 1.2.4., 1.3.2., 1.3.4., 1.4.1., 2.5.3., 4.1.3., 6.3.1., 6.3.4.

Measures & Findings

4.1.1. Alumni giving percentage

Details/Description: Determine success of increasing alumni giving percentage rate by comparing giving amongst alumni to this same point in time last fiscal year. The entire division will work cohesively to identify graduates that may have a role in the cultivation of major private gifts to the university.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Supporting Attachments:

Findings for 4.1.1. Alumni giving percentage

Summary of Findings: Mid Year Analysis: We have experienced outstanding growth among our alumni giving rates. The number of alumni donors has tripled and the number of alumni gifts has doubled. We are extremely pleased at this point in the academic year and look forward to continued success in this area. During the CIAA Tournament this year an alumni challenge has been issued to all alumni. Our goal is to reach 750 alumni donors by March 4th, and at this point we are on track to do so. The attached report will provide an overview of our success in this area.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence:

Gift Summary Report (Excel Workbook (Open XML))

4.1.2. Relationship with the Nat'l Alumni Association

Details/Description: Attempt to manage relationship with the National Alumni Association and its chapters to foster a stronger connection with the university are a major goal of our division and the Office of Alumni Affairs. We will manage this objective by communicating more regularly with chapter presidents, attending more chapter meetings and encouraging alumni gatherings across the country to foster a stronger partnership.

Acceptable Target:

Implementation Plan (timeline):

Key/Responsible Personnel:

Findings for 4.1.2. Relationship with the Nat'l Alumni Association

Summary of Findings: Mid Year Analysis:

Our relationship with the National Alumni Association continues to grow stronger and our partnerships with chapters have increased significantly. We have implemented chapter send off's which allow incoming students to connect with the alumni chapter in their hometown in an effort to welcome them to the university and provide an instant system of support for the student. We hope that this will assist with the overall experience of our students, increasing our retention rate and ultimately encouraging these students to support FSU after

Supporting Attachments:

graduation.

Acceptable Target Achievement:

Recommendations :

Reflections/Notes :

Substantiating Evidence: