

Advancement Division Accomplishments 2006-2007 Fiscal Year

Overview

Extraordinary progress was made on all fronts in the Advancement Division this year. In addition to the specific accomplishments and activities listed below, significant shifts were made in the structure and culture of the division.

The emphasis on marketing was clarified and magnified by the merger of Graphic Services and Public Affairs into a new consolidated department of Marketing and Communications. Existing positions were re-organized to create an Associate Vice President position to oversee the new department. A planning retreat in the fall was used to assess progress made toward the Noel-Levitz Marketing Study recommendations and to identify and prioritize key projects and activities. A priority list of tightly-defined audiences and consideration of potential return on investment guided strategic decisions about which projects to implement. Many of those projects are listed below. Increasing enrollment is the top goal of these projects and of the newly-formed Marketing and Communications department. The recent increase in marketing efforts has been a major factor in the increases in the rate of conversion of inquiries to applicants, and applicants to enrollees seen last fall and anticipated for the fall of 2007.

The results of fundraising efforts will be fully reported on after the close of the fiscal year, but it is already clear the major changes made in fundraising programs are improving results – HSU will have close to a record number of alumni making contributions this year, and total giving, excluding bequests, will also be up significantly. Among the major shifts in fundraising programs this year was the establishment of a stable and more intentional annual giving program with an emphasis on expanding the base of donors. The work of identifying and assigning the very best prospective donors, coupled with a clarification of the priority of major individual donor prospects for key positions, will build the number of individuals making larger gifts to HSU.

A significant amount of time and energy was invested in assisting the University with its budget communications and processes. While this did not necessarily impact the main advancement goals of enrollment focused marketing and gift income, the need for significant structural shifts in the budget process required additional effort. Among the major improvements were an accelerated timeline for budget decisions, broad realization of the need for major budget restructuring, and facilitation of communications for an open and exhaustive education, review, and decision making process.

The progress made in advancement work and the improved results are encouraging, but significant work remains. Major goals for next year include the establishment of an intentional planned giving operation, continued emphasis on major gifts, identification of key corporate and foundation prospects, preliminary planning for a comprehensive campaign, continued improvements in annual giving, and further progress on marketing and positioning of HSU.

The activities and accomplishments listed below are grouped by functional area. Generous donors and volunteers, collaborative assistance from across campus, and the diligent work of the talented team in advancement have all contributed to these achievements and this success-filled year.

Advancement Foundation

- Four new board members were added: Jim Brown, James Joseph, George Schmidbauer, and Mike Stockstill.
- Increased assets from \$17,075,888 as of 12/31/05 to \$20,489,312 as of 12/31/06.
- Funds available for distribution increased from \$215,131 for FY 05/06 to \$594,963 for FY 06/07. This increase of 276% % is mainly due to additional income from the Schatz estate and an increase in the distribution rate from 3% to 3.5%.
- Accelerated the timeline for announcing distributions from August to February allowing financial aid and program managers to plan ahead for the July 1 start of the fiscal year.

Advancement Services

- Restructured database framework for integration of new methods for annual giving programs.
- Provided complex statistical data to analyze the results of the revamped annual giving program.
- Acquired databases from various campus departments/auxiliaries and structured framework for integration into Raiser's Edge software resulting in 2,200 additional alumni records, increasing alumni who can be solicited by 10% over last year's total for the same period (7/1/06 - 4/30/07).
- Orchestrated and implemented Advancement Services server move to Information Technology Services.
- Processed 9,218 gifts representing an increase of 3,102 or 66% over prior year's gifts for the same period (7/1/06 - 4/30/07).
- Created framework for analyzing constituents through wealth screening and provided complex statistical reports to identify and track major donor prospects.
- Created a team of student employees to assist with increased data input, gift processing, and related work.

Alumni Relations/Alumni Association

- Held successful Alumni Association Distinguished Alumni event in April honoring Kenneth L. Fisher, Wesley Chesbro, and Michelle Kelly for their leadership in their respective fields, national stature, outstanding contributions to their community, and their association with the University. Established student-table sponsors for the event, fostering greater student participation.
- Launched Wildlife Alumni Chapter (increasing the number of chapters from 3 to 4).
- Increased affinity revenue for the Alumni Association by 50% via two new long-term contracts (Marsh & Bank of America).
- In conjunction with the Athletic Department, hosted a large reception prior to a men's basketball game at UCLA.
- Concluded promotion of "Annual to Life" membership conversions resulting in 78 new life memberships for 06/07 (totaling 150 conversions for the entire program).

- Enhanced Alumni Association membership benefits with the addition of Liberty Mutual homeowners/renters insurance, an Edge Wireless cellular phone program, Alumni Wine Club and the Alumni Finder Service.
- Established Alumni Association scholarship endowment with the Advancement Foundation (\$12.5K deposited with a commitment to give \$25,000).
- Successfully hosted the CSU Alumni Council (with participants from 20+ campuses).

Annual Funds

- Restructured the Annual Giving Program (Humboldt Loyalty) by establishing a year-round calling program and employing best practices for direct mail.
- Increased annual giving revenue significantly and alumni donor participation by approximately 100% (final numbers will be available after the close of the fiscal year).
- Acquired 1800 new alumni donors, nearly doubling alumni participation.
- Implemented new structure for departmental direct mail appeals (launching eight for late spring 2007).
- Partnered with Athletics on spring Football Phonathon (more than doubling their 2006 efforts).
- Launched new and revised end-of-calendar-year appeals (EOY), raising \$50K.

Government Relations

- Helped organize and facilitate HSU representation at annual legislative days.
- Prepared editorials and other materials for key initiatives.
- Assisted Chancellor's office in a successful effort in support of ballot proposition for public education funding.
- Prepared websites and technology for implementation of the new CSU e-advocacy program.

Major Gifts

- Identified and assigned the top 150 individual donor prospects, and defined a pool of 2,000 potential prospects.
- Established weekly meetings and accountability systems with staff newly assigned to and responsible for major prospects.
- Hosted numerous major donor events.
- The process and criteria for establishing scholarships and endowments was streamlined – this process resulted in freeing over \$180,000 that had been sitting in uncleared accounts.
- Shifted the emphasis toward an external and donor focused model.

Marketing

- Text for 44 out of 50 academic brochures is complete.
- New web messaging for Explore website – created over 200 separate write-ups for a comprehensive marketing site that touts both the Humboldt area and our university’s key strengths.
- New university magazine – revised and improved both the editorial focus and visual approach of our university magazine, now named *Humboldt*.
- New messaging for Housing, Dining, & Financial Aid websites – completely rewrote these major university websites so that they reinforce HSU’s overall marketing campaign. Also created text for accompanying print materials.
- New flagship recruitment brochure – Created the text and shaped the approach of the first recruiting brochure (*Eight Things You Should Know About Humboldt State*) to effectively address *all* of HSU’s primary marketing messages.
- Devised and implemented “Plus One” campaign to encourage returning students to take an additional class, which helped increase average student load significantly.
- Produced four issues of *The Boldt*, the new electronic newsletter to alumni.

News and Information

- Redesign of the Public Affairs website.
- Creation and management of the communication plan for campus-wide budget reduction process.
- Produced more than 70 press releases were sent to the regional media and posted to *Humboldt State News Online*.
- Distributed 51 weekly media advisories detailing multiple campus stories issued to regional media.
- Coordinated a dozen press conferences for building projects, budget issues, campus innovation and distinguished campus visitors.

Photography

- Created new photo resource archiving nearly 35,000 images complete with indexing by key words and captions.
- Planned settings, researched locations, choreographed to the appropriate style, scanned existing photographs, managed scheduling, and shot photos for the Scholars Calendar, Departmental brochures, Explore website, Housing brochure, 48 wall hangings for the Boating and Safety Instructional Center, two issues of *Humboldt Magazine*, web home page banners, Admissions Travel brochure, and the Financial Aid website. Shot new photographs or researched and provided re-touched and cropped versions of existing photographs for numerous departments across campus and multiple news-related events.

Budget Process Communications

- Managed numerous media inquiries regarding the budget including the staging and communications for two press conferences.
- Provided communications support for multiple campus missives regarding the budget.
- Facilitated communications for various group meetings with students and faculty regarding the budget.
- Created comprehensive budget information web site.
- Helped facilitate the budget planning process.

Printing

- Solved numerous technical and chemical challenges related to a new Sakurai press and Mitsubishi Digital plate-Setter, to produce high-end process color jobs including department brochures, Admissions recruitment pieces, and Commencement materials.
- Installed the Xerox 4110. With over 1.5 million impressions in less than a year the Xerox has increased turnaround time and efficiency in Copy Services. The Xerox has also added new mail-merge and variable data capabilities to Graphic Services.
- Employed and trained 6 students to help run efficient production in specialized areas of printing, bindery, and copy services.
- Invested significant time in the continued management of Campus Recycled Paper Policy in the absence of Recycling/Sustainability Coordinator. Fielded inquiries about mechanical problems, issuing waivers, researching and testing new products, communications with other institutions interested in modeling our policy, and updating information on web site.
- Completed and delivered over 900 press and 1100 copy jobs.

Special Events

- Directed Commencement 2007 and assisted with Fall Convocation and Spring Convocation planning.

Web Office

- Redesigned and launched the new HSU homepage and main site with a focus on marketing to prospective students.
- Hired Jarad Petroske in the new position of Web Editor to help with content creation and maintenance.
- Set up the Web Council, which includes everyone at HSU creating or maintaining web sites, and held first meeting.
- Created virtual tour that highlights HSU's location and unique features (<http://www.humboldt.edu/explore>).
- Created and published 3 general use web templates for campus (<http://www.humboldt.edu/~web/development/category/C25/>).
- Created web site for WUE program, and continued support for campus marketing efforts.

- Finished 3 academic department web sites (Social Work, Oceanography, Kinesiology & Recreation Administration).
- Created online application for the Housing License and new Housing & Dining web site to improve the experience of prospective students.
- Helped lead effort to ensure all HSU web sites are accessible per the ADA.