

Central Development Offices at Penn State

Office of the Senior Vice President for Development and Alumni Relations

The Office of the Senior Vice President for Development and Alumni Relations oversees a division of more than 300 employees responsible for alumni relations and development at Penn State's 24 campus locations, including the main campus at University Park.

Office of the Associate Vice President for Development

The Office of the Associate Vice President for Development manages the major gift fundraising efforts at Penn State. We provide managerial oversight of the directors of development who lead the major gift solicitation activity for all fundraising units at University Park and the Commonwealth campuses, excepting the Hershey Medical Center.

Office of the Executive Director for Administration

The Office of the Executive Director for Administration encompasses the areas of Donor Services, Finance, Information Systems, Human Resources, and Recruitment and Staff Development. Our primary role is to provide support and information to both our donors and colleagues, including:

- gift acknowledgement and receipting
- gift reporting
- financial reporting
- interpretation of existing Penn State policies and procedures
- fundraising system upgrades and enhancements
- recruiting and appointment of new employees
- professional education and development of employees

Commonwealth Campuses Development Office

The Commonwealth Campuses Development Office serves as a liaison between the development offices at University Park and the development offices at the campuses. This office reports to the Associate Vice President for University Development and is responsible for managing the directors of development at each of Penn State's nineteen undergraduate campuses and the Great Valley campus. Our focus is to oversee, work

with, and assist the directors of development and development staff at each of the campuses on their major gifts fundraising efforts. These activities include, but are not limited to, annual goal setting, coordination of donor visits, prospect management/tracking, and University-wide campaign efforts. In addition, this office collaborates with other central development offices, including Annual Giving, Corporate and Foundation Relations, Development Communications, Donor Relations, Gift Planning, Leadership Gifts, and Research and Prospect Development.

Office of Alumni/Development Information Systems

The Office of Alumni/Development Information Systems (ADIS) mission is to acquire, maintain, and report current and relevant information about alumni, friends, parents, and organizations for use by the Division of Development and Alumni Relations and the appropriate University staff. ADIS supports and maintains personal computers, servers, and network infrastructure for the central development offices as well as various applications used to support alumni/development activities

Office of Annual Giving

The Office of Annual Giving administers the Penn State Future Funds, which is the direct mail, phone (Lion Line), and e-communications operation of University Development, focusing primarily on alumni and friends of the University who give less than \$50,000 per year. Efforts are highly centralized, allowing college and region-based development officers to focus on gifts above the \$50,000 level. More than 100,000 alumni, friends, parents, faculty, and staff made gifts to Penn State through the Future Funds last year. For the tenth year in a row, Penn State has more alumni donors than any other university in the country.

Office of Corporate and Foundation Relations

The Office of Corporate and Foundation Relations (CFR) is available to help organizations identify and assess opportunities for collaboration with the University and investment in our people and programs. CFR creates a bridge for partnerships with the University, while acting as a one-stop resource for corporations and foundations in need of knowledgeable faculty and staff, talented students, high-tech facilities, and opportunities for philanthropic support of activities that make a difference.

Office of Development Communications

The Office of Development Communications maintains a comprehensive communications program for the Office of University Development, and it serves not only central units but also college and campus fundraising offices. Its responsibilities include:

- developing University-wide themes about philanthropy and ensuring consistency in quality and message across all Penn State fundraising materials
- writing and editing major proposals, solicitation letters, and other communications with top donors
- creating both print and electronic newsletters and other publications intended to communicate fundraising objectives to a larger audience
- overseeing the Web presence of Penn State's development operation
- preparing a broad range of marketing and solicitation materials, including brochures, proposal templates, presentations, etc.
- offering writing workshops and other training opportunities for division staff

Office of Donor Relations and Special Events

The Office of Donor Relations and Special Events serves as a resource for both division staff and for alumni and friends of Penn State. Our mission is to cultivate, recognize, serve, and steward our donors through programs, events, and proper accountability, and we work in cooperation with other units and departments. The Mount Nittany Society (\$250,000 lifetime giving), with its Laurel Circle (\$1 million lifetime giving) and Elm Circle (\$5 million lifetime giving) levels, is the University's preeminent club for the recognition of individual giving and resides in our office. We manage the Penn State Endowment Report and all individual endowment reporting, and we coordinate special events for University Development, the Office of the President, and the Board of Trustees.

Office of Donor Services

Working in partnership with our central, college, and campus fundraising staff, the Office of Donor Services records, receipts, and acknowledges gifts to Penn State in compliance with University policies and procedures as well as state and federal law. We facilitate and ensure the transfer of gift dollars to individual gift accounts and endowments. The office also records major pledges, sends pledge reminders, processes credit card gifts, and verifies and completes gift matching forms. In addition, this office provides data maintenance for non-alumni records (friends, parents, corporations, foundations, etc.) in

the alumni/development database. We also serve as a resource to our donors, faculty and staff, and development personnel by communicating and clarifying gift policies and by providing training related to the gift and pledge data contained in our central gift database.

Office of Gift Planning

The Office of Gift Planning is the central office responsible for the cultivation, solicitation, design, and administration of planned gifts. In addition, the office offers assistance in outright gifts of specific assets. Our staff is experienced in gift planning and understands the importance of philanthropy as a part of a successful overall estate plan. We are available to assist donors and their advisers as they consider the many opportunities available. Our goal is to present donors with options and to help them make the best choice possible. We accomplish this by ensuring that gifts express donors' interests in the University and maximizing the benefits that both our donors and the University receive from these gifts.

Leadership Gifts Program

The Leadership Gifts Program at Penn State works with prospective donors at the highest levels of giving, typically \$5 million or more. Leadership Gifts strengthen Penn State's mission by encouraging and soliciting gifts that can literally transform parts of Penn State into nationally or internationally prominent entities. Housed in the Office of the Senior Vice President for Development and Alumni Relations, the Director of Leadership Gifts—with guidance from the volunteer Leadership Gifts Committee, other senior members of the development staff, and the President—focuses full-time attention on leadership gift donors. This attention is frequent and personalized. The Office of Leadership Gifts also coordinates the President's involvement in development activities, making recommendations on how he should spend his time with potential benefactors and preparing briefings for all personal meetings with the President.

Office of Research and Prospect Development

The Office of Research and Prospect Development provides relevant, quality information and analysis to development units to assist them in identifying lifetime donor relationships with our alumni, friends, and corporate and foundation partners. Our role is accomplished by:

- analyzing data from our central database as well as outside vendors to assist in identifying potential donors and their ability as a major gift prospect

- providing in-depth research reports on individual donors including career, personal, Penn State relationships, estimated wealth and known assets
- data-mining central database to provide units lists of potential names used to support travel, project-based fundraising, events, stewardship activities, etc.
- customized scoring using multiple variables tailored to the unique units to further prioritize efforts
- regularly indexing numerous relevant periodicals (*New York Times*, *Philadelphia Inquirer*, *Wall Street Journal*, etc.) to identify individuals/companies that may be of interest in identifying prospects or furthering relationships
- supporting units in developing possible strategies for moving prospects through the fundraising process