

Fundraising at Penn State: How All The Pieces Fit Together

Rodney P. Kirsch
**Senior Vice President for Development and Alumni
Relations**

Campaign All-Volunteer Summit
September 5, 2008

Future

For the future
THE CAMPAIGN FOR PENN STATE STUDENTS



Defining Our Program

Penn State has a centrally coordinated development program with a strong commitment to delivering core services to academic leaders, unit-based development offices, and volunteers within a multi-campus, constituency-based fundraising environment.

What Are Some of the Pieces?

- 42 fundraising units, 24 campuses, and 300 staff members
- 8,700 managed prospects
- 500+ campaign volunteers
- 13,000 contacts to prospects annually
- 750 major gift solicitations annually
- 281,000 gifts and 163,000 donors
- About \$180 million gift receipts
- More than 5,500 separate endowments

Who are the Key Players?

Volunteer Committees

Serving campuses, colleges, units, and central program offices

Academic Leaders

President, vice presidents, deans, and chancellors

Central Development

Programs and staff

Unit Development

Programs and Staff

For the future

THE CAMPAIGN FOR PENN STATE STUDENTS

PENNSSTATE



How Do We Manage Traffic?

Prospect Tracking System (PTS)

- Individual Staff Principal (SP) assigned to each prospect
- SP coordinates all contact with the prospect
- Other Staff (OS) may be assigned to prospect based on multiple interests of prospect
- Focuses on prospects rated \$50,000 or more
- Report of Contact (ROC) filed for each substantive contact
- Proposed solicitations of \$25,000 or more are cleared by Associate VP before they are submitted to the prospect
- Communication and the Golden Rule are key

Who Gets To Solicit Whom?

Factors for determining solicitation approval:

- The expressed interest of the prospect—first and foremost
- Staff knowledge of prospect's interest
- Past giving of prospect
- Academic/Unit affiliation
- Staff review/discussion:
 - Major Prospect Discussion
 - Leadership Gift Discussion
- Competing interests/Honest brokers/Joint solicitations

A few remaining points...

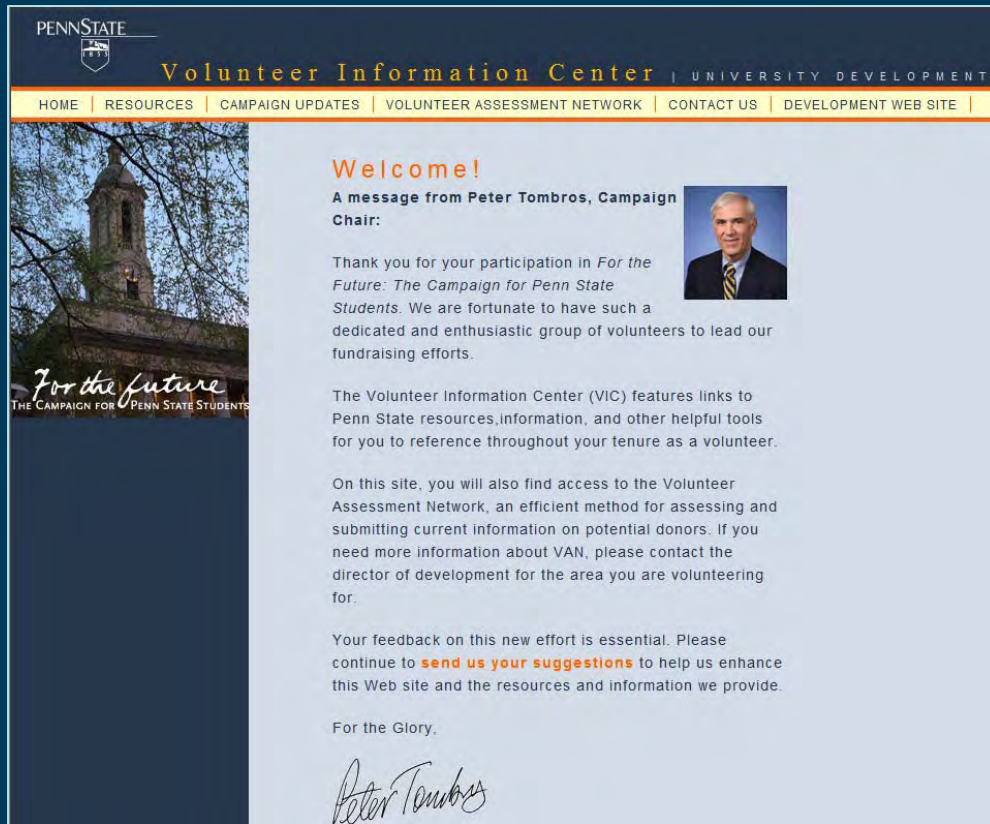
- Prospects you identify may or may not be assigned already
- Keep your staff liaison informed of pertinent contact with prospect
- Prospects not seen in 12 months may be reassigned
- Invitations to small group events (fewer than 20) must be cleared with SP

Growing Impact of Private Support

Fiscal Year	State Appropriation	Private Support Plus Endowment Payout	Ratio State: Private
1983	\$143,481,000	\$18,147,000	\$1 : \$.13
1990	\$240,072,000	\$62,433,000	\$1 : \$.26
1996	\$269,141,000	\$98,852,000	\$1 : \$.37
2003	\$322,592,000	\$232,707,000	\$1 : \$.72
2008	\$352,782,000	\$241,861,000	\$1 : \$.69

Volunteer Information Center

www.vic.psu.edu



PENNSSTATE
Volunteer Information Center | UNIVERSITY DEVELOPMENT

HOME | RESOURCES | CAMPAIGN UPDATES | VOLUNTEER ASSESSMENT NETWORK | CONTACT US | DEVELOPMENT WEB SITE

For the future
THE CAMPAIGN FOR PENN STATE STUDENTS

Welcome!

A message from Peter Tombros, Campaign Chair:

Thank you for your participation in *For the Future: The Campaign for Penn State Students*. We are fortunate to have such a dedicated and enthusiastic group of volunteers to lead our fundraising efforts.

The Volunteer Information Center (VIC) features links to Penn State resources, information, and other helpful tools for you to reference throughout your tenure as a volunteer.

On this site, you will also find access to the Volunteer Assessment Network, an efficient method for assessing and submitting current information on potential donors. If you need more information about VAN, please contact the director of development for the area you are volunteering for.

Your feedback on this new effort is essential. Please continue to **send us your suggestions** to help us enhance this Web site and the resources and information we provide.

For the Glory,

Peter Tombros

- The Volunteer Information Center (VIC) serves as a one-stop resource for our campaign volunteers.
- You will need to log on with a username and password (provided by the director of development you are working with).
- The Web site is updated often, so be sure to visit frequently.

Volunteer Information Center

www.vic.psu.edu

PENNSSTATE
Volunteer Information Center | UNIVERSITY DEVELOPMENT

HOME | RESOURCES | CAMPAIGN UPDATES | VOLUNTEER ASSESSMENT NETWORK | CONTACT US | DEVELOPMENT WEB SITE

Resources and Tools

Materials and Supplies

- **Draft Campaign Case Prospectus** (April 2007) (pdf)
- **Key Campaign Messages** (pdf)
- **Biographies for Chair and Vice Chairs** (pdf)
- **Volunteer Profile** (pdf)
- **Important Dates and Milestones for Volunteers** (pdf)
- **Funding the Cost of Fundraising at Penn State (Fiscal Year Ended June 30, 2007)** (pdf)
- **Strength for the Future: Penn State's Stewardship of Endowed Gifts** (pdf)
- Campaign Style Guide--Coming soon!
- Campaign Letterhead--Coming soon!

Penn State Information

- **Penn State Home Page**
- **Office of Investment Management**
The Office of Investment Management (OIM) oversees the day-to-day management and administration of University investment funds.
- **President's Report on Philanthropy**
- **Penn State Fact Book**
In addition to general information about Penn State, this site contains information on students, faculty and staff, budget and finances, research expenditures, and alumni and development activities.

For the future
THE CAMPAIGN FOR PENN STATE STUDENTS

QUICK LINKS

- >>Materials and Supplies
- >>Penn State Information
- >>Office of University Development Information
- >>Recognition Societies
- >>Campaign Updates
- >> VAN

Up-to-date campaign information:

- Press releases
- Campaign materials
- Links to important Penn State and Development information
- Access to the Volunteer Assessment Network