

Strategic Initiative Project Work Plan Summary

Project Name:	Clayton State University's First Comprehensive Campaign Plan	Academic Year:	2016 –2017 Version 1.25.18
Strategic Priority:	Increase External Funding	Project Leaders:	Craig Hill and Kate Troelstra
Team Members:	Maria Adams, Sam Dixon, Tim Duncan, Charlie Harris, Lou Orchard, Stephen Schultheis		
Project Description:	Develop and implement a comprehensive campaign plan to increase private external funding to achieve established goals by 2019.		
Success Measure(s)	<p>Year 1: Summary of historical fundraising data/trends and projections for next five years – COMPLETE Campaign Steering Committee recruited – COMPLETE Institutional priorities established/validated – COMPLETE (report to be presented in September) Campaign goals established – COMPLETE Campaign publicly launched – COMPLETE</p> <p>Years 2&3: Successful progress towards goals Defined stewardship plan</p> <p>Years 4&5: Visible stewardship efforts Full pipeline of major gift prospects</p>		

#	MAJOR TASKS / Action Steps ⁱ	Target Date	Responsibility	Deliverable(s) / Notes
1.0	<input type="checkbox"/> Analyze trends, past results and current pipeline	June 2016 - November 2016	Development Team	Historical fundraising data, projections of fundraising targets for next five years, MG pipeline summary COMPLETE
2.0	<input type="checkbox"/> Solicit lead gifts for campaign	June 2016 - November 2016	Development Team & Campaign Steering Committee	Silent phase total (lead gifts) of 40-60% of total goal received in gifts and pledges by launch of campaign. COMPLETE – 33% raised at launch
2.1	<input type="checkbox"/> Identify prospects for lead gifts	Ongoing through September 2016	Development Team, Campaign Steering Committee, Foundation Board	Pipeline with cumulative total in excess of \$3M. ONGOING
2.2	<input type="checkbox"/> Define cultivation/solicitation strategies for lead gift prospects	Ongoing through September 2016	Development Team, Campaign Steering Committee, Primary managers	Prospect Engagement Plan ONGOING
2.3	<input type="checkbox"/> Make asks for lead gifts	July 2016 through November 2016	Primary managers and solicitation team members	Demonstrated progress through prospect pipeline. COMPLETE FOR SILENT PHASE

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2.4	☐ Close lead gifts	July 2016 through November 2016	Primary managers and solicitation team members	Pledges booked. COMPLETE FOR SILENT PHASE
3.0	☐ Recruit and train campaign volunteers	September 2016 - November 2016	Development Team and Campaign Chair	Recruit campaign steering committee comprised of 7-12 engaged volunteers who have already made a MG commitment to the campaign. COMPLETE – 8 members recruited
3.1	☐ Identify prospective steering committee members	July 15, 2016	Development Team, Campaign Chair, President, Development Committee Chair	Identified pool of 15-20 potential steering committee members who have made or will make significant commitment to the campaign. COMPLETE
3.2	☐ Finalize job description for campaign volunteers	July 15, 2016	Development Team and Campaign Chair	Job Description. COMPLETE
3.3	☐ Recruit campaign steering committee members	July 2016 – November 2016	VPUA, President, Campaign Chair, Development Committee Chair	Campaign Steering Committee of 7-10 members. COMPLETE
3.4	☐ Hold first meeting of steering committee	October or November 2016	VPUA and Campaign Chair	Meeting date and agenda set. COMPLETE – First meeting was in April
4.0	☐ Gather internal stakeholder input regarding institutional needs/priorities utilizing final strategic plan as a framework for discussion	October 2016 - March 2017	Development Team	Establish priority needs of the institution as a whole. COMPLETE
4.1	☐ Identify general institutional priorities	October 2016	Development Team	Listing of 5-7 focus areas. COMPLETE
4.2	☐ Hold internal stakeholder meetings	October 2016 – February 2017	Development Team, Academic Affairs, Student Affairs	Reports of prioritized focus areas by department/area. COMPLETE
4.3	☐ Compile/analyze/validate results	February 2017 Revised date September 1	Development Team and President	Executive report to present to Campaign Steering Committee, Foundation Board, and Cabinet. Report done verbally.

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4.4	<input type="checkbox"/> Integrate into case statement	February 2017	Development Team	Case Statement document for donors. COMPLETE
5.0	<input type="checkbox"/> Set goals and benchmarks	December 2016	Campaign Steering Committee, Foundation Board, & Development Team	Set Overall Goal, Annual Fund Goal, Planned Gift Goal, Alumni Participation Goal. COMPLETE with exception of alumni participation goal.
5.1	<input type="checkbox"/> Using projections developed earlier, recommend goal and framework for gift counting to Steering Committee	November 2016	Development Team & President	Overall goal, AF goal, PG goal, Alumni participation goal set for campaign; Framework for counting gifts. COMPLETE with the exception of alumni participation goal.
5.2	<input type="checkbox"/> Work with Marketing and Communications to develop a campaign communications plan	November 2016	Development Team & MarComm Team	Plan for campaign communications ONGOING
5.2	<input type="checkbox"/> Present goal to Foundation Board for Approval	December 2016	VPUA, Campaign Steering Committee, Development Committee	Accepted goal for campaign. COMPLETE
6.0	<input type="checkbox"/> Launch campaign	Spring 2017	Campaign Steering Committee, Foundation Board, & Development Team	Video. COMPLETE – rather than a video we chose to focus on the website as a whole. A program involving campus leadership, volunteer, faculty, and students was held with nearly 90 in attendance.
7.0	<input type="checkbox"/> Update University community on milestones and progress of campaign	Ongoing Spring 2017 – 2019	Development Team & MarComm Team	ONGOING
8.0	Solicit major gifts			
8.1	<input type="checkbox"/> Identify prospects for major gifts	Ongoing through September 2019	Development Team, Campaign Steering Committee, Foundation Board	Pipeline with cumulative total in excess of overall goal. COMPLETE AND ONGOING
8.2	<input type="checkbox"/> Define cultivation/solicitation strategies for major gift prospects	Ongoing through September 2019	Development Team, Campaign Steering Committee, Primary managers	Prospect Engagement Plan COMPLETE AND ONGOING

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8.3	<input type="checkbox"/> Make asks for major gifts	July 2016 through November 2019	Primary managers and solicitation team members	Demonstrated progress through prospect pipeline COMPLETE AND ONGOING
8.4	<input type="checkbox"/> Close major gifts	July 2016 through November 2019	Primary managers and solicitation team members	Pledges booked COMPLETE AND ONGOING
9.0	<input type="checkbox"/> Monitor progress and adjust plan as necessary	Annually in July	Development Team	
10.0	<input type="checkbox"/> Celebrate successful campaign	2019	Campaign Steering Committee, Foundation Board, & Development Team	Meet all goals
11.0	<input type="checkbox"/> Continue stewardship practices to ensure future campaign success	Ongoing	Development Team	Clear and defined stewardship plan

ⁱ Use verb-noun combination to focus activity, e.g., research variables, design survey, pilot survey, etc.