

## Strategic Initiative Project Work Plan Summary

<b>Project Name:</b>	Clayton State University's First Comprehensive Campaign Plan	<b>Academic Year:</b>	2016 –2017 Version 3.14.18
<b>Strategic Priority:</b>	Increase External Funding	<b>Project Leaders:</b>	Craig Hill and Kate Troelstra
<b>Team Members:</b>	Maria Adams, Sam Dixon, Tim Duncan, Charlie Harris, Lou Orchard, Stephen Schultheis		
<b>Project Description:</b>	Develop and implement a comprehensive campaign plan to increase private external funding to achieve established goals by 2019.		
<b>Success Measure(s)</b>	<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&amp;3: Successful progress towards goals            Defined stewardship plan</p> <p>Years 4&amp;5: Visible stewardship efforts            Full pipeline of major gift prospects</p>		

#	MAJOR TASKS / Action Steps <sup>i</sup>	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 <b>COMPLETE</b>
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. <b>COMPLETE – 33% raised at launch</b>
2.1	<input type="checkbox"/> Identify prospects for lead gifts	Ongoing through September 2016	Development Team, Campaign Steering Committee, Foundation Board	<b>Pipeline with cumulative total in excess of \$3M. ONGOING</b>
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 <b>ONGOING</b>
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. <b>COMPLETE FOR SILENT PHASE</b>

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

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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. <b>COMPLETE with exception of alumni participation goal.</b>
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. <b>COMPLETE with the exception of alumni participation goal.</b>
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 <b>ONGOING</b>
5.2	<input type="checkbox"/> Present goal to Foundation Board for Approval	December 2016	VPUA, Campaign Steering Committee, Development Committee	Accepted goal for campaign. <b>COMPLETE</b>
6.0	<input type="checkbox"/> Launch campaign	Spring 2017	Campaign Steering Committee, Foundation Board, & Development Team	<b>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.</b>
7.0	<input type="checkbox"/> Update University community on milestones and progress of campaign	Ongoing Spring 2017 – 2019	Development Team & MarComm Team	<b>ONGOING- as of 10/24/18 we have officially surpassed \$12mil goal. This will not be announce publicly as we will continue to raise funds through June 19 then make final announcement</b>
8.0	Solicit major gifts			<b>ONGOING- 18/19 Founder's Common, Fayette facility, Heritage Bank Capstone</b>
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. <b>COMPLETE AND ONGOING</b>

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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 <b>COMPLETE AND ONGOING</b>
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 <b>COMPLETE AND ONGOING</b>
8.4	<input type="checkbox"/> Close major gifts	July 2016 through November 2019	Primary managers and solicitation team members	Pledges booked <b>COMPLETE AND ONGOING</b>
9.0	<input type="checkbox"/> Monitor progress and adjust plan as necessary	Annually in July	Development Team	<b>COMPLETE</b>
10.0	<input type="checkbox"/> Continue stewardship practices to ensure future campaign success	Ongoing	Development Team	Clear and defined stewardship plan
<b>10.1</b>	<input type="checkbox"/> <b>Create shared Stewardship Plan</b>	<b>January 2019</b>	<b>VP, (new) Donor Relations, Academic Units</b>	<b>Create and record shared stewardship activities for major donors</b>
11.0	<input type="checkbox"/> Celebrate successful campaign	2019	Campaign Steering Committee, Foundation Board, & Development Team	Meet all goals
<b>11.1</b>	<input type="checkbox"/> <b>Develop Campaign wrap-up/Thank you video(s)</b>	<b>2019</b>	<b>Development Team, Mar/Comm</b>	<b>Deliver impactful messages of thanks and impact stories as campaign concludes</b>
	<input type="checkbox"/>			

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