Board of Regents
May 4, 2018

Philanthropic Impact Study

Lisa D. Calvert
Vice President, University Advancement
CEO, Washington State University Foundation
1. Learn how teams work together
2. Align system and university leadership with emerging advancement vision
3. Focus advancement staff and create consistent messaging
4. Stakeholder interviews
   - Advancement Staff 128
   - Academic and University Leadership 30
   - WSU Foundation Volunteers 23
   - Board of Regents 2

   Total: 183
Emerging Themes

1. Significant gaps in process, procedures, policy and technology

2. Front-line fundraisers frustrated with time focused on fundraising (10-50%); some requesting more robust portfolios

3. Consistency needed regarding authority/process for:
   - College/unit staff recruiting/hiring
   - Personnel issues
   - Performance accountability
   - Compensation
   - Budget decisions
Emerging Themes (continued)

4. Advancement staff requests training, growth opportunities and career paths
5. Need to create more collaborative, thoughtful, and engaging strategies for our donors to inspire larger investments
6. Concern about retention and compensation of advancement staff
7. Board of Directors and Trustees desire more meaningful and purposeful involvement
Sustained Philanthropy

- Engage a broad base of donors
- Secure gifts of all sizes
- Move donors to higher gifts
- Growth is consistent
- Shift the gift mix to more cash

Graph from CORE Group
Fundamentals for Success

1. Philanthropic Capacity
   Screening affinity analysis balanced with benchmarking models confirm donor base has capacity and proclivity

2. Infrastructure
   Right balance between staff and volunteer leadership as well as resources and staffing plans to capture the identified philanthropic capacity

3. Bold, Fundable Ideas
   Donors invest in response to dynamic vision and bold ideas
1. Philanthropic Capacity – Immediate Initiatives

Screening/affinity analysis balanced with benchmarking models confirm database has capacity and proclivity.

• Screening/affinity analysis results are $1.2 billion in outright gifts
  
a. Restructure to best practice to capture philanthropic potential

b. Analyze and implement wealth screening results

c. Analyze initial benchmarking with peer and aspirant university fundraising programs and implement Phase 2 to identify investment models
1a. Restructure to Best Practice to Capture Philanthropic Potential

Foundation Leadership Structure – October 25, 2017

Lisa Calvert
VP University Advancement, CEO, WSU Foundation

Mark Hermanson
Exec AVP, Operations and Campaign Director

Gil Picciotto
Exec. AVP, Foundation Operations and Leadership Gifts

Mike Connell
Senior AVP, Individual Giving

Kim Holapa
AVP, Stewardship, Events, Board Relations

Trevor Durham
AVP, Marketing & Communications

Juan Zavala
AVP, Technology and Advancement Records

Dan Bernardo
WSU Provost

Constituency Development Teams
(21 units)

Foundation Relations Team

Prospect Research Team

WSUF Office Assistants

WSU Seattle Development Staff

WSUF Finance Team

Annual Giving Team

Gift Planning Team

Stewardship Team

University Events & Outreach Team

Marketing & Communications Team

Board Relations

WSUF Advancement Records

WSUF Information Technology

Alumni Engagement Team

Membership and Marketing Team

Finance and Operations Team

*YELLOW = Areas of Finance, Operations, and Services
1. Philanthropic Capacity – Immediate Initiatives

Screening/affinity analysis balanced with benchmarking models confirm database has capacity and proclivity.

- Screening/affinity analysis results are $1.2 billion in outright gifts
  
  a. Restructure to best practice to capture philanthropic potential
  
  b. Analyze and implement wealth screening results
  
  c. Analyze initial benchmarking with peer and aspirant university fundraising programs and implement Phase 2 to identify investment models
2. Infrastructure – Immediate Initiatives

Right balance between staff and volunteer leadership as well as resources and staffing plans to capture the identified philanthropic capacity

a. Assessment of finance, operations, advancement services and technology by industry expert

b. Industry expert joins Foundation as the interim Senior AVP, Finance, Operations and Services

c. Implement principal gifts program to capture identified philanthropic capacity
3. Bold Fundable Ideas

Donors give in response to a dynamic vision and bold fundable ideas – the bolder the better.

- WSU has the opportunity to make the move from traditional thinking (emphasis on campaign priorities) to more donor-centric thinking (emphasis on the bold fundable ideas that define the University’s educational agenda).
- Focus will move forward to create a university-wide compelling philanthropic case that frames the bold fundable ideas to test with key stakeholders.

Objectives:

1. Review/assess viability of 2015 preliminary needs assessment; recommend next steps
2. Review models from other institutions use to generate bold, fundable ideas; identify critical factors for a successful practice.
3. University and development leadership, in partnership, identify the opportunities which translates into the bold fundable ideas necessary to build a compelling philanthropic case.