Indiana University-Purdue University Fort Wayne (IPFW)
Program Write-up with Task Force Comments

DEV Development

Program Summary

Task Force: Thank you for the time and effort you put forth in your report. Through the USAP process, we are working to create a culture of continuous improvement; setting specific and measurable goals is an important step in the process of moving IPFW toward this culture of improvement. Part of this effort is getting individuals and units at IPFW to think differently about planning and the future. The work of Development is critical to IPFW and we greatly appreciate the time you spent on this significant endeavor. Thank you again for being part of this important initiative.

Criterion: #1: Mission - How does your unit support the mission of the university? This may include your mission and vision statements. (no more than 200 words)

Question: Mission - How does your unit support the mission of the university? This may include your mission and vision statements. (no more than 200 words)

The Development unit meets the mission of the university to raise private dollars in support of the organization, facilities, programming, students and faculty/staff. The unit is responsible for engaging stakeholders in the fundraising mission both on and off campus and leads the effort of the full-cycle of private, corporate and foundation fundraising from cultivation to stewardship.

- MISSION

To secure philanthropic support and promote IPFW's mission

VISION

To put meaning at the center of our community, one interaction at a time

VALUES

To embody tradition and pride; nurture, advocate, and honor

Criterion: #2: Accomplishments - Please list significant accomplishments from the last three years as they align with Plan 2020 goals

Question: I. Foster Student Success - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area I: Foster student success.
Question: II. Creation of Knowledge - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area II: Promote the Creation, Integration, and Application of Knowledge.

- Raised private funds to create and sustain professorships and division chairs across campus that support facility scholarship and research and impacts recruitment and retention
- Raised private funds to incentivize and support faculty success, encouraging faculty retention, innovative research and quality teaching
- Raised private funds to develop the honors program facilities and strengthen the learning-environment for a more rigorous curriculum and collaborative faculty-student learning experience with an innovative technology hub and dedicated staff
- Provided funding to the library for materials and technology that support scholarship, research, learning and instruction for the benefit of our students, faculty and staff
- Secured private funding for labs and program enhancement in the disciplines of nursing, systems engineering, wireless communications and geo sciences in response to regional demand and industry priorities.
- Key-staff presented on-campus to a diverse student and faculty body on themes of leadership and fundraising to engage and spread awareness of funding needs and activities
- Vice Chancellor (VC) presented at two industry-related conferences on fundraising, leadership and diversity raising IPFW’s profile on a national and international level

Question: III. Regional Hub - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area III: Serve as a Regional Intellectual, Cultural, and Economic Hub for Global Competitiveness.
Question: IV. - Create a Stronger Univ - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area IV: Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization.

- Raised private funds to provide resources and external funding that support capital projects, scholarship, research, operations and program growth to enhance the competitive offerings and facilities of the university as a whole
- Protected donor intent and encouraged additional gifts through strategic stewardship and mindful recognition of donors to sustain giving in the future
- Served as the aggregator of the university’s funding opportunities for prioritization to better address the university’s strategic plan
- Investigated and fostered strategic relationships with alumni, friends, corporations and foundations to increase funding and support from our stakeholders
- Created a strategy in the community for donor relations and development to create a sustainable external fundraising model
- Developed an advancement division that includes a comprehensive procedure manual and follows best practice guidelines from Council for the Advancement and Support of Education (CASE) and the Association of Fundraising Professionals (AFP) to ensure optimal performance, efficiency, and measurable outcomes.
- Improved processes and procedures in advancement services for improved donor acknowledgment, financial management, and reporting
- Improved collaboration with our parent campuses, Purdue and IU, which creates better utilization of resources and our strategic partnership

Question: Other Accomplishments - Please list any other significant accomplishments from the last three years that do not align with Plan 2020.

Criterion: #3: Accreditations - Program specific accreditation and status

Question: Accreditations - What program-specific accreditations and status do you have, if any?

N/A
Question: Constraints/Benefits - How do these accreditations constrain or benefit the work of your unit, if applicable?

N/A

Criterion: #4: Laws and Mandates - Federal and state laws or mandates that your unit addresses

Question: Federal and State Laws - What federal and/or state laws or mandates do you address, if any?

- Department of the Treasury Internal Revenue Service (IRS) Publication 526, Charitable Contributions 2011
- 990 Federal Tax Returns
- State of Indiana, Charitable Contributions
- Payment Card Industry- DSS (PCI-DSS)
- 501(c)(3) mandates

Question: Constraints/Benefits - How do these federal and state laws or mandates constrain or benefit the work of your unit?

N/A

Criterion: #5: Inefficiencies - Activities that you spend resources on inefficiently or in ways that do not support the mission.

Question: Inefficient use of resources - On what activities, if any, do you spend resources (money, time, people, etc.) inefficiently or in ways that do not support the mission of your unit or the university? List as many as apply.

- Events that do not support donor relations or development
- Unreliable data resulting in wasted or undeliverable materials
- Strategy is reactionary rather than sustainable
- Many forms and processes are paper and not digital
- Priorities are too broad for the staff number and unit budget

Criterion: #6: IR and Budget Review - Review of your department profile and budget

Question: Contextualize IR data - Upon review of your IR Department Profile (for academic units) and FY 14-15 Budget information, are there any data you want to correct or contextualize? To view your profile or budget visit the Office of Institutional Effectiveness website: http://www.ipfw.edu/offices/ir/profiles/
The requests for funding priorities across campus are diverse and, at this point, too large in scope for our current staff of three fundraisers to fulfill. The other challenge is the issue of donor relations which, though part of our mission, is also part of the strategy of various university divisions and departments. Critical to our fundraising strategy is the ability to communicate and engage our donors/alumni. We do this through sustained marketing which includes but is not limited to creative design, print collateral, direct mail, face to face visits, technology (email, phone-a-thon & online giving), and events. It is important that we have the necessary funding to cover these various forms of outreach. Over the past six months we have identified the specifics regarding these challenges and plan to submit recommendations and set priorities and strategy for both fundraising and donor recognition at the end of this fiscal year.

**Criterion:** #7: Goal One - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:**

1. Comment on the specificity of the goal:

   The overall outcome of the goal is not specific. Goal could be strengthen by stating the amount of funds planned on raising.

2. Comment on the goal's measures:

   We recommend that you set a clearer quantitative measure that will signify achievement of the goal.

3. Comment on the unit’s ability to achieve the goal (include a consideration of the departmental profile and budget data):

   The goals seems to be challenging with the resources expected to be available.

4. Comment on the goal’s relevance:

   Relevant

5. Comment on the timeline of the goal:

   Timeline for completion of this goal is unclear.

   Possible opportunities for collaboration or suggestions for addressing a gap:

   Develop internal relationships with those across the university who plan own development activities.

**Question:** Unit Goal - What is your unit goal?

Engage and communicate with stakeholders in order to raise private funds for university priorities.

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.
1. Foster Student Success  
2. Promote the Creation, Integration and Application of Knowledge  
3. Serve as a Regional Intellectual, Cultural and Economic Hub for Global Competitiveness  
4. Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**High**

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

- I.B.2 Increase number of scholarships to attract and retain high-achieving students for growing honors program
- I.B.5 Increase private funding for technology, resources, and facilities
- I.D.4 Intentionally recruit diverse candidates to fill open positions
- III. A Seek opportunities to align faculty research priorities with existing regional partners
- IV.C.4 Enhance volunteer engagement in strategic goals and fundraising through creating a work space within the development office that can foster collaboration.
- I.B.1 Continue to engage students in development events and programming for experiential learning
- I.B.2 Solicit and close philanthropic gifts to grow honors program
- I.B.5 Solicit and close philanthropic gifts to continue to modernize collegiate experience
- I.C.4 Pursue funding opportunities in support of international students/programs
- I.C.6 Pursue philanthropic gifts to support study abroad programs
- I.D.1 Solicit private funding for multicultural programming
- I.D.3 Obtain resources to build and strengthen programs that support students from historically under-represented groups
- I.E.2, 3 & 4 Establish new relationships for funding that will attract and retain highly competitive students for signature programs
- II.B & C Obtain private funds to develop the honors program facilities and strengthen the learning environment for a more rigorous curriculum and collaborative faculty-student learning experience
- IV.C.1 Enhance donor relations programs
- IV.C.1 Create Additional communication and engagement campaigns and activities for our current donors and prospects
- IV.C.4 Enhance volunteer engagement in support of strategic goals
- IV.C.4 Recommend donors and alumni prospects to serve on various university boards and committees

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Was this completed? Yes or No

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

No.

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?
3 new fundraisers & 2 new coordinators in FY 16, 3 new fundraisers & 2 new coordinators in FY 17, accurate data that encompasses email addresses, phone numbers and physical addresses, adequate space, funding for direct communication and engagement activities, and increased communication

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Facilities, job market, economy, philanthropic trends, current relationships with alumni, data integrity, change in administrative leadership, change in athletic program division, change in fiscal agent, high turnover among fundraising professionals, lack of staff resources, low enrollment, lack of brand loyalty and awareness, poor promotion of events and messaging, historic lack of communication, acting independently and an unwillingness to collaborate with the development office for university fundraising purposes, few events & engagement with alumni & donors, competition with other philanthropic organizations, and donor fatigue.

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Achieving this goal will be dependent upon the availability of resources. A timeline can be determined once resources are identified.

**Criterion:** #8: Goal Two - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:** 1. Comment on the specificity of the goal:

   This is a specific goal but would benefit from baseline measurements.

   2. Comment on the goal's measures:

   The metrics are defined. Next year expect to see defined quantitative metrics.

   3. Comment on the unit's ability to achieve the goal (include a consideration of the departmental profile and budget data):

   Achievable

   4. Comment on the goal's relevance:

   Relevant

   5. Comment on the timeline of the goal:

   Achievable

   Possible opportunities for collaboration or suggestions for addressing a gap:

   No
**Question:** Unit Goal - What is your unit goal?

Goal 2: Establish performance metrics for the development unit

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

1. Foster Student Success
2. Promote the Creation, Integration and Application of Knowledge
3. Serve as a Regional Intellectual, Cultural and Economic Hub for Global Competitiveness
4. Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

High

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

- IV.A.1 Establish performance metrics for directors of development, development services, and donor retention
- IV.A.2 Utilize reports from the gift systems reporting on appeals, major gifts and annual fund to assess their impact and success

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Was it completed? Yes or No

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

No

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

Training and continued professional development

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Staff change over and change in fiscal management addition of new systems and technology

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?
Providing requests are allocated we can accomplish this goal in 3-5 years.

**Criterion:** #9: Goal Three - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:** 1. Comment on the specificity of the goal:

Without more specifics (e.g. what does “grow” or “increase” mean) this goal will be hard to measure.

2. Comment on the goal's measures:

See previous comment

3. Comment on the unit’s ability to achieve the goal (include a consideration of the departmental profile and budget data):

The goals seems to be challenging with the resources expected to be available.

4. Comment on the goal's relevance:

Relevant

5. Comment on the timeline of the goal:

Dependent on resources

Possible opportunities for collaboration or suggestions for addressing a gap:

n/a

**Question:** Unit Goal - What is your unit goal?

Goal 3: Grow the infrastructure and increase efficiency for the development office.

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

1. Foster Student Success
2. Promote the Creation, Integration and Application of Knowledge
3. Serve as a Regional Intellectual, Cultural and Economic Hub for Global Competitiveness
4. Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

High
**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

- IV.A.2 Create and utilize reports from gift systems that report on appeals, major gifts, and annual fund to assess their impact and success
- IV. B.1 Allocate staff resources based on university priorities and private funding potential
- IV.C.1; 1.D.4 Hire qualified, experienced, and diverse staff to fill opened and re-envisioned positions
- IV.C.1 Integrate IU records and data into the gift system
- IV C 1 Secure suitable work space and furnishings
- IV.C.2 Implement a strategy for sustainable external funding that meet our strategic priorities
- IV.C.1 Build infrastructure to support development goals and functions by utilizing new software programs such as an integrated online giving platform, planned giving tools and resources
- IV.C.1 Establish a phone-a-thon program
- IV.C.3 Re-envision Foundation Board as fundraising leadership board

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Was it completed? Yes or No

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

No

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

New software, IT support, Finding experienced and qualified fundraisers, training and professional development, better and appended data, physical space, furnishings and equipment, prioritization of Purdue staff on IU alumni data integration

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Staff turnover, IT & Purdue not prioritizing our needs, change in university priorities, acting independently and an unwillingness to collaborate with the development office for university fundraising purposes, change in fiscal agent, space limitations, resistance to foundation board changes, and availability of qualified candidates

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Providing requests are allocated we can accomplish this goal in 3-5 years.

**Criterion:** #10: Goal Four - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.
**Indiana University-Purdue University Fort Wayne (IPFW)**

**Program Write-up with Task Force Comments**

**DEV Development**

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #11: Goal Five - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.
**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don't have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #12: Goal Six - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.
**Question**: Actions - What action(s) does your unit plan to take to support this unit goal?

**Question**: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question**: Resources - Are you able to accomplish this unit goal with your current resources?

**Question**: Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question**: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question**: Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion**: #13: Goal Seven - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question**: Unit Goal - What is your unit goal?

**Question**: IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question**: Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question**: Actions - What action(s) does your unit plan to take to support this unit goal?
Question: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Question: Resources - Are you able to accomplish this unit goal with your current resources?

Question: Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Question: Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Criterion: #14: Goal Eight - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

Question: Unit Goal - What is your unit goal?

Question: IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

Question: Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

Question: Actions - What action(s) does your unit plan to take to support this unit goal?

Question: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Question: Resources - Are you able to accomplish this unit goal with your current resources?
**Criterion:** #15: Goal Nine - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?
**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #16: Goal Ten - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don't have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?
Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?