Blueprint for MSUM Fundraising: Context and Process

Minnesota State University Moorhead is entering a new era in its history. The economic and political environments require increased public private partnership. If MSUM is to pursue a leadership position in public education, and achieve other important goals, the University must attract voluntary support.

As part of a major gifts initiative, fundraising for academic scholarships and other key projects is underway. A major priority is the Wellness Center, which has a matching gift as an incentive to drive towards completion. In addition, we are pursuing a $½M development plan for Athletics, which is necessary to raise Athletic scholarships to a competitive level in the University’s conference, the recently-expanded NSIC. Staff and volunteer resources will be directed towards these initiatives during fall 2008. Scholarship fundraising will be ongoing. However, a timely completion of the Wellness Center and the Athletics initiative will allow for a coherent broader strategy beginning in winter 2009.

In order to increase MSUM’s ability to attract voluntary support, two key activities must be undertaken. First, MSUM must identify and develop priorities for fundraising that are tied to strategic initiatives and have the ability to transform the educational program. MSUM must be able to effectively communicate those priorities. Second, the organization must undertake a program of rigorous capacity building. This includes engaging leadership volunteers, effectively deploying staff, and creating an infrastructure to support the aforementioned activities.

Identification and Development of Priorities

The identification and development of fundraising priorities is a multifaceted, iterative process involving campus units, central administration, and donors. This process involves the following three steps: selection, prioritization, and development.

Project Selection

The guiding principles for selection of specific projects are:

- Service to the broader University and its strategic plan;
- Service to individual units and their long range plans;
- Targets of opportunity created by donors that are deemed to be acceptable and beneficial to the university.

Projects will be reviewed for their impact, marketability, type and amount of funds needed, and ability to complement other potential projects. In order to promote a more cohesive approach to prospective donors, individual units will be asked to prioritize their own projects before forwarding to the President’s Office. To facilitate this process, units will be asked to take their projects through a first “triage” to identify the amount of funds needed, the type of funds needed (endowment, current program, or capital), primary beneficiaries (who is served by this project), potential donors, and other University partners. A standard format will be provided.

Service to the broader University and its strategic plan

As part of this process, academic and administrative units will be asked to identify their priority projects for external funds for the next five year period. This includes tying their recommended fundraising initiative to one of the strategic directions and a specific goal. Placing projects in this framework enables the University to develop a “case for support” that is coherent, compelling and tied to MSUM’s strategic plan – in short it will enable MSUM to demonstrate how it will be different or transformed through voluntary support.
Service to individual units and their long range plans
Individual academic and administrative units have goals, plans, and aspirations that run parallel to or complement broader University goals. Following the same process, units will identify unit-specific projects and explain how they serve a broader unit goal. Individual cases and fundraising plans will need to be developed for unit-specific projects.

Targets of opportunities created by donors
While the University will prioritize projects for which it will actively seek voluntary support, donor interest may drive additional projects. For example, a donor may seek to endow a scholarship program or facility that is not viewed as a priority. Although there may be projects that the University will view as more urgent, a particular donor may only be interested in funding a specific project. The University will need to review these projects individually for an acceptance decision, but will not actively seek them.

Project Prioritization
Beginning in late September, President Szymanski will work with institutional leadership and volunteer leaders to prioritize fundraising projects for the University. This process is likely to engage members of individual units in order to clarify project proposals.

Selection of projects will not ensure that dollars will be raised for those projects, but they will be made a focus of staff and volunteers. Additionally, a communications plan to pre-sell the projects and state the case for supporting them will be developed following this process. Final selection of projects will occur in October.

Development of Projects
Following project selection, President Szymanski and her team will develop project work plans including volunteer leadership, a communications and stewardship plan articulating the value and impact and serving as a call to action, prospect pools, and a staffing plan that will support pursuit of funds around these priority projects.

Capacity Building
For MSUM to achieve its current and long term goals, the fundraising capacity of the institution must be expanded. To do this prospect engagement must be increased across the spectrum, from the annual fund to the highest level of presidential prospect. Several key steps have begun under the leadership of Joan Justesen, the new Vice President of the Alumni Foundation.

The Alumni Foundation must continue to develop and refine the implementation of performance standards to measure staff productivity. These standards are drawing the staff closer to industry norms. During the fall of 2008, working with outside counsel, volunteers and the University community, staff will develop prospect pools and a plan for engagement around projects and the broader themes of the University’s strategic plan.

Timeline August 2008-December 2008
- August 27 & 28
  - Presentation of process to faculty and staff.
  - Preliminary discussions about Fundraising Programs.
  - Begin review of communications program
- September 24 & 25
- Review of priorities, discussion of marketability of priorities.
- Prioritize development program augmentation or modifications
- Complete review of communications effort.
- Start relationship management plan.

- October
  - Selection of priorities.
  - Review of priorities with Foundation Board.
  - Continued implementation of development program augmentation or modifications
  - Development of fundraising communications program.

- November
  - Finalize case stating and develop plan for prospect pool engagement.
  - Development of project based work plans.
  - Development of prospect pool.
  - Complete friend raising plan.

- December
  - Introduction of overall strategic plan for fundraising.

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