**Vice President for Development**  
**Assessment Report, 2012**

**Expected Outcomes: Attain philanthropic targets**  
The Office of Development will engage the university’s alumni and philanthropic supporters in meaningful ways to position the university to propose and secure gifts of philanthropic investment.

**Assessment method: Analyze fundraising data and outcomes**

**Method: Intentional review of prospect portfolio and productivity goals for development officers**  
Each university fundraiser (development officer) is assigned annual financial and productivity goals relative to the portfolio of their respective college, school or other campus unit (constituency), with specific targets for significant donor engagement and solicitations. The development officers are accountable to these goals and meet monthly with the associate vice president for constituent development to review progress to-date and to strategize on closing gifts. The associate vice president for constituent development and the vice president for development review progress toward goals on a monthly basis; the Auburn University Foundation Board of Directors reviews this progress on a quarterly basis.

**Findings:**  
CY12 continued a steadily increasing trend of private philanthropic support for Auburn University. The Auburn University Foundation booked new gifts and commitments totaling more than $111 million in private support — an increase of 18% over CY11, and nearly 20% over its running four-year average. *Supportive documentation: CY12 Four-Year Funds Raised Report*

**How did you use findings for improvement?**  
Intentional focus by development officers on their top tier prospects and portfolios combined with increased accountability of the development officers to meet metrics has helped ensure that the annual monetary target for Auburn University is strategic, as it is based upon the capacity of these portfolios, and is met.

**Additional comments:**  
one

**Expected Outcomes: Maintain and increase alumni participation through fundraising**  
The Office of Development will seek to maintain and increase the percentage of university alumni who make a philanthropic gift to the institution during the calendar year.

**Assessment method**

**Method: Benchmark alumni participation in fundraising**  
Auburn University participates in the Council for Aid to Education (CAE) annual Voluntary Support of Education (VSE) Survey, which is the authoritative national source of information on private giving to higher education and private K-12, and consistently captures about 85 percent of the total voluntary support to U.S. colleges and universities. Participation in the annual data-collection effort provides Auburn and other institutions common metrics upon which to benchmark activity from year to year, and against industry standards.

**Findings:**  
Tracked by fiscal year, alumni giving for FY12 (Oct. 2011-Sept. 2012) was 10.4% (23,162 donors) of the university’s 222,808 alumni of record. This represented a slight decline of
1.0% compared to FY11 participation rates (11.4%, or 25,150 donors from among 220,656 alumni of record). When trending FY12 against four-year alumni participation rates, FY12 was 0.74% below average. However, FY12 represented the highest average gift level within that four-year period ($1,224.30 per donor vs. an average of $1,080.47 — or $143.83 more per donor in FY12 vs. the four-year average).

CAE reported, based on 2012 data, that alumni giving declined from 9.5% in 2011 to 9.2% in 2012. Auburn’s decline in 2012 is attributed to several factors, including a database conversion that resulted in a new calculation of “alumni of record”. While Auburn’s 2012 decline is slightly three-times greater than the national average, overall alumni giving was nearly 1.0% greater than the national average. Supportive documentation: CAE VSE survey data reporting: FY09, FY10, FY11, FY12

How did you use findings for improvement?
The Office of Development engaged an outside consultant to assess our Annual Giving program, including its alumni participation rate data and trends. While national averages of alumni participation have declined in the last several years, the assessment concluded that targeting certain Auburn alumni demographics may improve our overall participation rate. The Auburn University Foundation Board of Directors formed an Annual Giving Task force to develop a strategic plan to increase annual giving, and improve the Alumni participation rate.

Additional comments:
Auburn’s decentralized development model allows individual constituencies to develop, customize and execute the alumni relations and fundraising tactics they employ with their respective target audiences. Monthly Development Officer Forums allow fundraising staff to share best practices, success stories and tactics with colleagues as a means improving general fundraising strategies and specific alumni participation.

Expected Outcomes: Engage and support an independent board
Established as a separate entity to receive charitable support on Auburn University’s behalf, the Auburn University Foundation is governed by a volunteer board of directors that manages all foundation affairs, investment of the endowment, business and property holdings. The board includes as staff representatives the vice president for development, who serves on the board as its president, and other staff members who support of a variety of administrative and fiduciary board functions.

Method: Track and benchmark board member satisfaction
Disseminate an annual Foundation Report Card to elicit information regarding board members’ perceptions of and satisfaction with their board awareness, participation and charitable support.

Findings:
One-hundred percent (100%) of 2012 respondents (representing 100% of the board) indicated they were satisfied or somewhat satisfied with their familiarity with the board’s history, mission and strategic plan, and their obligations and responsibilities as board members. Nearly all responses regarding individual levels of meeting attendance and participation at board meetings, committee meetings and other university-related events were equally favorable. All respondents indicated a clear understanding of the expectation that they make a personal philanthropic gift to the foundation; at the time of the survey:
- 68% had made an annual philanthropic gift to Auburn in CY12
- 21% had included Auburn in their estate plan
- 79% of respondents indicated they had identified and informed staff of potential gift prospects
• 58% made solicitation calls individually or with another representative of the board or Auburn
• 74% actively cultivated potential donors or participated in donor stewardship
• 47% set up gift-cultivation calls for Auburn staff or volunteers
• 42% wrote personal correspondence to acknowledge gifts
• more than 74% indicated they promoted or shared information about Auburn
• more than 74% indicated they have provided Auburn-related information to others
• 68% sought information about campus programs or events
• 42% hosted an event on behalf of Auburn
• 95% thanked an Auburn faculty member, staff member or volunteer for excellent work.
• of those responding regarding their satisfaction with the New Director Orientation, 67% were favorable and 5% unfavorable
• 72% of respondents were definitely willing to serve as a mentor to a new director, with another 17% undecided.

Supportive data: CY12 Board Report Card analysis

How did you use the findings?
The findings allowed board and office leadership to create a more intensive, comprehensive orientation program for new foundation directors. As part of the nomination/selection process for new directors, expectations regarding the role of the foundation directors were more clearly articulated, including the fact that they are expected to help staff identify major gift prospects, connect staff to those prospects, and make their own philanthropic commitment.

Additional comments:
none