

Increased Donor Participation

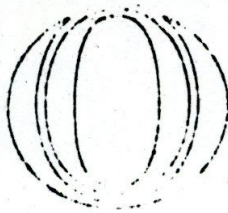
To date, there has been 365 donors making contributions who did not give a gift las fiscal year. 336 individuals and 29 foundations, corporations, businesses, etc. made up this total. The gift income has been significant from these two sources:

\$61,921.00 from individuals

\$46,811.77 from foundations, corporations,
businesses, etc.

Of special note of interest is that 739 donors this year are alumni, an increase of 231 over last year's figure of 508 at this time.

OTTAWA



Telephone (913) 242-5200

UNIVERSITY

Ottawa, Kansas 66067

April 4, 1978

Dear Pastor:

We here at Ottawa University are overwhelmed by the report from the Kansas Baptist Convention staff concerning response from the churches about participation in "O.U. Sunday," April 9.

The request for our presence in the churches that day has taken many forms. It includes a broad range of representatives from faculty, students, trustees, and alumni. This presence will be expressed in sermons, brief talks, Sunday School classes, musical presentations, informal discussions and even youth rallies.

For understandable reasons a number of churches that would like to have observed this event through some form of Ottawa University representation on that day could not do so. Even so, many indicated their intention to observe the event at another time and in their own way.

We wish it were personally possible to convey our gratefulness to every church. Though this will not be immediately achievable, we want you to know we are open to invitations to meet with you upon other occasions in the future.

We look forward to the new day of relationship with the churches of the Kansas Baptist Convention that has already begun to take form. Be assured of our prayers for you, as we seek yours for Ottawa University.

Sincerely,

Milton C. Froyd
Milton C. Froyd
Interim President

5. To continue to identify Trustee leadership and willingness to be involved in the development programs and efforts.

GOAL #5: Corporate/Foundation Relations

OBJECTIVES

1. To generate a minimum of \$75,000 from corporations for budget relief.
2. To generate a minimum of \$125,000 from foundations for budget relief.
3. To create a comprehensive University "shopping list," consistent with the statement of mission, in order to establish funding priorities and over-see research to identify corporate/foundation sources of support.
4. To coordinate with appropriate persons and offices the writing of corporate/foundation appeals related to the "shopping list" priorities.
5. To work closely with the Administration, the Resources Committee and the Board of Trustees in determining funding priorities.
6. To secure additional funds from corporations/foundations above and beyond those being sought for budget relief purposes.
7. To continue to research/develop new contacts for financial support.

PROGRAMS

1. To faithfully and supportively fulfill any obligations with the Kansas Foundation for Private Colleges (KFPC).
2. To establish University funding priorities; research sources of potential support consistent with priorities; and develop solicitation strategies.
3. To develop, coordinate and submit a minimum of 100 proposals in support of University priorities.
4. To coordinate cultivation and solicitation, involving the President and key administrators, trustees, faculty and development staff.
5. To market corporate matching gifts through the direct mail phase of the Annual Fund.
6. To develop a list of key members of the various constituencies who are in top corporate management levels and involve their support in fund-raising.

7. To provide at least one major on-campus event each year for corporate/foundation leaders; preferably in the Spring.
8. To maintain a comprehensive list of proposals pending with a weekly review.
9. To maintain a comprehensive list of proposals submitted with a weekly review of their status.
10. To maintain a list of 25 top corporate and 25 top foundation prospects -- reviewed bi-weekly.
11. To write and distribute guidelines for preparing Foundation proposals to the University Community.

GOAL #6: Government Relations

OBJECTIVES

1. To aid Administrative offices in acquainting the University Community with the various government opportunities available.
2. To keep information and resource materials about government opportunities available and current.
3. To provide assistance in drafting proposals and preparing grant requests.

PROGRAMS

1. To include governmental opportunities in the distribution of information about grant and gift possibilities.
2. To maintain a library of reference materials for people seeking funding sources.
3. To continually review publications about funding trends/programs and opportunities.
4. To periodically request program information and guidelines from various government agencies.
5. To prepare guidance material outlining standard proposal and budget formats.
6. To work closely with the Vice President and Academic Dean and other academic personnel regarding governmental support programs.

GOAL #7: Staffing/Professional Growth of Existing Staff

OBJECTIVES

1. To provide professional training opportunities.

2. To increase knowledge and fundamental aspects of educational fund-raising, public relations, communication, etc.
3. To maintain full awareness of development programs, trends, directions.
4. To maintain high staff morale.
5. To improve, strengthen and maintain relationships with faculty and administrators.

PROGRAMS

1. To have each development professional attend at least one training conference per year.
2. To regularly review books and journals describing basic and new techniques and ideas, revised legal regulations, and higher education trends, programs and directions.
3. To participate in regular and active staff meetings.
4. To develop a comprehensive fund-raising policy for the University.
5. To develop and coordinate a faculty/staff committee to assist in development activities.
6. To hold at least two office social functions each year including professional and support staff.
7. To assist and guide support staff in their professional developments; to maintain professional relationships at all times.
8. To maintain a supportive, loyal and professional image at all times; to work actively to strengthen and increase the Development Office image throughout the campus.
9. To work effectively to use faculty and staff within the development program wherever and whenever possible.

GOAL #8: Gift Acknowledge/Donor Recognition

OBJECTIVES

1. To appropriately "thank" each donor according to the level of giving.
2. To recognize gifts of an unusual nature.
3. To increase the likelihood of repeat gifts and to provide an incentive for increased and new giving.
4. To maintain adequate and appropriate gift records for all donors and programs.

PROGRAMS

1. To publish a "Donor List" at least once each year at the close of the fiscal year.
2. To develop a sound monthly reporting system for appropriate distribution.
3. To formally acknowledge at the earliest possible moment each gift to the University, including pledges.
4. To develop new Donors Clubs and to provide appropriate incentives for donors to be identified with a specific gift giving level.
5. To prepare for a gift acknowledgement flow chart for the University involving the President.

GOAL #9: The OU Annual Fund

OBJECTIVES

1. To generate the following financial support for current operations:

Church	\$200,000
Foundations	125,000
Corporations	75,000
Alumni	180,000
Non-Alumni	95,000
Others	25,000
	<u>\$700,000</u>

2. To achieve the following participation levels in annual support.

Alumni	27%
Parents	20%
Faculty/Staff	60%

3. To realize increased budget support and greater volunteer participation through the conveyance of institutional directions and needs and the importance of private voluntary support.
4. To establish and strengthen a positive working relationship between the Development Office and the larger University community to the end that the coordinated efforts of both result in consistent program enrichment and increase support.
5. Increase the number of Class Agents.
6. To strengthen the Parents' Association and select a Parents' Fund Chairperson (or Chairpersons).
7. To challenge parents with a goal of \$97,000 for 1979-80: \$70,000 for the Annual Fund and \$27,000 for dormitory projects and the Union Ramp for handicapped persons.

8. To plan and implement a year-round alumni-parents-other friends direct mail effort, including four general mailings and a special personal letter from President Shaw to alumni who have never given to the University.
9. To hold information meetings across the country with alumni, parents, and other friends.
10. To publicize annual giving through feature articles in University publications and special printed material.
11. To conduct an on-campus appeal for support of the Annual Fund with Faculty Representatives to the Board of Trustees as co-chairpersons of the effort.
12. To produce a quarterly newsletter to parents, called PARENTS' PAGE.

PROGRAMS

1. Volunteer Organization: The Annual Fund

- A. To recruit at least one chairperson per class to serve as a Class Agent.
- B. To develop an Annual Fund Workshop for Class Agents to be conducted during the Fall Homecoming activities.
- C. To include Class Agents on the mailing list for the monthly issue of UPDATE.
- D. To recruit alumni, friends, students, faculty and staff for participation in the Annual TeleFund to be hold on campus and in strategic locations across the country.

2. Volunteer Organization: The Parents' Fund

- A. To recruit parents to serve as co-chairpersons of each of the six committees of the Parents' Association, including the Parents' Fund.
- B. To develop and convene a Parents' Fund Committee in the early Fall for the purpose of explaining the program and outlining the tasks.
- C. To include Parents' Fund Committee members on the mailing list for UPDATE.

3. Direct Mail: Total mailing list.

- A. Theme: "For Now and the Years Ahead"

B. Four general mailings to alumni, parents and friends.

(1) September - Letter from President on "State of the University."

(2) January - Letter from Annual Fund Chairperson.
Folder: "The OU Experience is Forever"

(3) March-April - Class Agent Letters
Folder: "The Importance of Participation"

(4) Late May - Letter from Alumni Director
Folder: "Progress Report"

4. Reunion Gift: 50th Reunion Class and others

A. Two work closely with 50th Class Reunion group regarding Glass Gift.

B. Special emphasis upon classes ending in "0" for major and deferred gifts. Presentation of Class Gifts on Founders Day.

5. To identify, cultivate and solicit major gift prospects in relation to new donor clubs.

6. To prepare individual proposals for individuals/corporations who are personally solicited.

7. To write proposals and secure funding for the following Trustee endorsed projects in addition to the \$700,000 Annual Fund goal:

Debt Reduction	\$150,000
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Capital/Maintenance Objectives:

Residence Halls:

Behan/Price Halls	8,000
Martin Hall	15,000

Academic Buildings:

Ward Science Building	50,000
Administration Building	20,000
Taui Jones Hall	15,000
Computer Center	10,000

General Campus Improvements:

Communications System	35,000
Energy Conservation Proj.	30,000
Union Ramp (for handicapped)	4,000
Heating Plant (Chimney)	10,000
Campus Lighting	
(Beautification)	10,000
	<hr/>
	\$357,000

8. In cooperation with the Assistant Director of Development, plan and host meetings across the country for alumni, parents and friends for the purpose of sharing information about OU. No solicitation is to be done during the meetings. Follow-up personal solicitation will be done by Development staff, the President and key volunteers.
9. Support Groups: Faculty/Staff/Students
 - A. To coordinate annual solicitation in the late Fall.
 - B. To develop a committee of volunteers to provide leadership.
 - C. To work effectively to use faculty/staff/students where possible within the total development program effort.

GOAL #10: Giving Prospects

OBJECTIVES

1. To develop and refine a prospect list under the following heading:
 - A. Those that should be personally solicited during this fiscal year. This would involve the writing of a personal proposal.
 - B. Those that should receive a personal letter and/or phone call during this fiscal year.
 - C. Those that should be retained/added to the direct mail solicitation list.
2. Category "A" above would include those who are in the following state of cultivation:
 - A. Closure expected in 12 months.
 - B. Closure expected within 24 months.
 - C. Closure not imminent, but continued on list as future prospect.
3. To increase membership at all levels of the Donors Clubs.
4. To enlarge the major gifts prospect list as quickly and with as many good prospects as possible.

PROGRAMS

1. To schedule development staff, the President, members of the Administrative Council, Trustees, and key volunteers to call on selected prospects each month.
2. To monitor top prospect lists to see that appropriate contacts are made by appropriate persons on a frequent basis.

3. To "dovetail" solicitation efforts with the Annual Fund and Planned Giving efforts.
4. To develop a comprehensive direct mail and visitation program for members of the President's Club, Trustees' Council and the Founders' Forum.
5. To review and revise constantly the list of major gift prospects, making assignments for calls among the President, development staff, Trustees, alumni leaders and other key volunteers according to the principle of the "right person calling on the right prospect."
6. Oversee research in relation to donor clubs including:
 - A. Identification of prospects for potential upgrading.
 - B. Giving history as recorded on master confidential prospect cards.
 - C. Invitation list of Donor Club members invited to President's Dinner -- President's Club, Trustees' Council, and Founders' Forum.

GOAL #11: Communications/Public Relations

OBJECTIVES

1. To plan a comprehensive communication effort for all constituents aimed at increasing public awareness, understanding, acceptance, involvement and support.
2. Identifying channels of communication and existing vehicles of communication, analyzing the effectiveness of current procedures and creating new channels/vehicles for promoting/informing/marketing OU and its programs.
3. To enhance coverage of sports activities and athletic events by upgrading the budget and activities of the Sports Information Program.
4. To recruit and employ a full-time Director of Public Relations and Information Services.

PROGRAMS

1. To edit Tauy Talk consistently on a quarterly basis:

September Issue
December Issue
March Issue
June Issue

2. To produce Pastors' Page on a quarterly basis:

September Issue
November Issue
February Issue
May Issue

3. To produce Parents' Page on a quarterly basis:

September Issue
November Issue
February Issue
May Issue

4. To produce a Pastors' Information Kit to be mailed in September.

5. To produce a development report entitled UPDATE monthly to faculty and staff, trustees, key alumni leaders, State ABCCR staff, selected Valley Forge Church leaders, and others.

6. To prepare deferred gifts mailings quarterly/seasonally:
Fall, Winter, Spring, Summer issues.

7. To prepare special reports from the President and others as required by public relations observations and programming.

8. To seek special opportunities through press/radio and TV for individuals, departments and the University in general to tell its story.

9. Through special events members of the various publics will be brought to the campus for entertainment and enlightenment: athletic events, cultural events, information meetings, workshops, seminars, conferences, etc..

OTTAWA UNIVERSITY
Ottawa, Kansas 66067

MANAGEMENT OBJECTIVES
Office of University Development
1979-80 Fiscal Year

GOAL # 1: Planned Giving

To increase constituency participation and dollar levels in an ongoing Planning Giving program.

OBJECTIVES

1. To obtain _____ in signed contracts.
2. To provide constituency with up-to-date information as it relates to estate planning in general and deferred gifts in particular, and to present at least _____ group programs.
3. To coordinate a program of servicing inquiries.
4. To establish a Planned Giving Committee which will serve to advise the University and help identify/cultivate/solicit prospects.
5. To develop and refine a prospect list, and to make _____ individual presentations to potential and current donors.
6. Participate in area personal solicitation efforts by calling on Planning Giving prospects and presenting planned giving information to area meetings.
7. To prepare and place a minimum of _____ articles/advertisements about Planning Giving.
8. Increase direct mail efforts for Planned Giving beyond the current four-times yearly mailing from R and R Newkirk to the first 1000 graduates.
9. To produce a brochure on Planned Giving identifying the many ways one may give to the University.
10. Create a mailing list of attorneys.

PROGRAMS

1. To mail the Financial Advisor four times during the year; with a special mailing to Trustees.
2. To follow immediately on all leads generated by direct-mail and word-of-mouth.

3. To meet at least once a year with the Planned Giving Committee and with key members of that Committee to review the Planned Giving program and discuss the promotion of same.
4. To actively market the University's Planned Giving Program through University publications and the development of new Development Office literature.
5. To advertise Planned Giving through appropriate media and University related publications, e.g., Church publications.
6. To personally visit at least once during the year all Planned Giving prospects who live within a 500 mile radius of Ottawa.
7. To personally visit at least once during the year all Planned giving donors who live within a 500 mile radius.
8. To maintain a list of estates that are in Probate pending distribution, and to contact attorneys and/or trust officers as appropriate to facilitate our receipt of these bequests.
9. To present Planned Giving information at area meetings and in other appropriate places.
10. To meet with key University alumni, attorneys who are in positions to suggest Planned Giving opportunities to their friends/clients.
11. To work closely with the University's Business Office in a joint effort to solicit both outright and deferred gifts of real property.
12. To develop a Planned Giving mailing list of a priority nature.
13. To periodically conduct a Planned Giving mailing effort to the University's total mailing list.
14. To prepare a Letter of Intent regarding Planned Giving for the entire mailing list of the University.

GOAL #2: Community Campaign

OBJECTIVES

1. To generate a minimum of \$50,000 in support from the local community.
2. To involve community residents in the development program through the solicitation process and the organization of a community-wide leadership committee.
3. To strengthen relationships with existing friends and develop new friends who will enhance the University's image and financial support.

PROGRAMS

1. To develop, coordinate and conduct a two-week intensive solicitation program.
2. To conduct a series of luncheons for key community leaders and businessmen/women.
3. To schedule personal solicitation visits with key business leaders and top prospects in the community using University personnel.
4. To develop a major gift prospect list for local community and to coordinate solicitation.
5. To strengthen contacts with local attorneys, trust officers and key community leaders.

GOAL #3: Church Relations

OBJECTIVES

1. To build a consistent communication program directed toward those Region/State/City administrative units of the American Baptist Churches/USA denomination that are directly related to the University through the Institutional Support Program.
2. To keep pastors and key church leaders informed of the programs, opportunities, services and needs of the University.
3. To build a volunteer network of friends of the University throughout the American Baptist Churches of the Central Region and to have those volunteers come to the campus at least once each year for the purpose of orientation/study/assignments/etc.
4. To create new vehicles/channels of communicating with churches and church leaders.

PROGRAMS

1. To be represented at the regional annual meetings for mutual benefit and concerns.
2. To attend ISP and Board meetings and to coordinate University involvement in this on-going program.
3. To host ABCCR Staff meetings on campus.
4. To develop a program of appropriate recognition and expression of appreciation for Church support.

5. To encourage the use of pulpit supply and other resources from the campus; and to encourage music and drama groups and the Mission Team from the University to visit local churches.
6. To encourage use of campus facilities by ABC related groups, and other denominational groups.
7. To identify and develop a prospect list of key laypersons and to make presentations to potential donors.
8. To develop a newsletter (PASTORS' PAGE) as a means of sharing with the pastor and the local congregation something of the on-going mission and ministry of the University.
9. To cooperate with other ISP institutions in planning/implementing an ISP Calvacade each year.
10. To keep a flow of information going to ABCCR, and area publications about OU.
11. Produce a quarterly newsletter called PASTORS' PAGE.

GOAL #4: Trustee Relations

OBJECTIVES

1. To generate annual gifts approximating \$100,000 from all OU Trustees.
2. To secure assistance in identifying, cultivating and soliciting major gift donors.
3. To develop an on-going orientation program for Trustees as to their role and opportunity for participating in fund-raising and long-range development planning of the University.
4. To keep Trustees informed by sharing with them periodic reports of development activities and accomplishments through UPDATE and by sharing copies of direct mail and other promotional materials that emanate from the Development Office.

PROGRAMS

1. To solicit all Trustees, preferably on a personal basis.
2. To work closely with the Resources Committee of the Board of Trustees.
3. To meet regularly with the Resources Committee for a review of development goals and objectives.
4. To coordinate and assist individual Trustees as they solicit key and selected major gift prospects.