

Assessment Plan

Institutional Advancement

May 19, 2014

Structured Analysis and Closing the loop

Analysis of outcomes data from fundraising by:

- **Ann Warwick**, Vice President for Institutional Advancement
- **Pam Lederman**, Associate Director of Development
- **Francisco Lomparte**, Associate Director of Alumni Relations
- **Nicole Totans**, Associate Director of the Annual Fund
- **Jennifer Budner**, Senior Staff Assistant (P/T)

Performance Indicators

- Fundraising by year
- Major Gifts Campaign
- Alumni giving
- Faculty and staff giving
- Other giving (Trustees, friends, foundations, corporations)

Unit Data:

- Growth in breadth and depth of alumni, donor, Trustee involvement with the College, Alumni Association and Optometric Center of New York
- Growth of donor participation in annual giving,
- Development of more robust alumni-student programs
- Expansion of donor stewardship program
- Increase size of OCNY Board by two new Trustees
- Increase alumni donor base by 25%

Campaign Success Indicators: to date

- Most money raised in four years in the history of the College
- 16 new scholarships established
- 53% participation in faculty/staff campaign
- Five new endowed scholarships from faculty/administration (pledged or established)

Priorities for 2014

Development: OCNY

- Successful completion of the \$10 million campaign
- Development of post-campaign fundraising strategic plan
- Development of targeted annual fund appeals and streamlined on-line giving
- Purchase of new prospect research software
- Increase individual donor major gift appeals for naming opportunities
- Initiate a new OCNY fundraising event – smaller than the gala
- Formalize Planned Giving opportunities with Trusts and Estates Committee
- Increase membership in the Corporate Advisory Committee

Priorities for 2014

Alumni Association

- Development of new programs for alumni with CE and Center for Career Development
- Development of new programs for students which will engage more alumni
- Develop a system to determine return on investment for alumni programs and mailings
- Hire a writer/designer to re-design Focal Point beginning April issue
- Better engage the alumni leadership in decision-making process for Association
- Streamline on-line giving for alumni
- Develop data – based segmentation strategies for solicitations
- Increase financial planning services to students, alumni and residents with Trusts and Estates members
- Establish a California alumni chapter and programs.

Support The Vision & The Promise Campaign

http://www.sunyopt.edu/giving/make_a_gift

As of 5/12/14

Verbal Pledges	\$376,000.00	Includes Stavros and Marco
Gifts to College	\$125,506.09	
In RE	\$9,382,618.98	
TOTAL	\$9,884,125.07	

To be raised by September 15, 2014 - \$115,875.00

