

ANNUAL GIVING INVESTMENT

Start: July 2024

Finish: June 2025

Budget: \$18,497

Actual YTD: \$0

ANNUAL GIVING INVESTMENT WORKFLOW

Task	Dec	Jan	Feb	Mar	Apr	May	June
Interviews after 3 rd Posting of Job	■						
Hiring & Onboarding of New Employee			■				
Orientation & Initial Training of New Employee					■		
Beginning of Portfolio Outreach					■		

RISK/MITIGATION

Recruiting for advancement positions has become more challenging. Not only does a dearth of quality fundraising talent exist, but more and more candidates also have expectations of fully remote work. As such, candidate pools are not as robust as one would like. Secondly, as with any frontline fundraiser, it takes time for a new employee to orient to the university to be an effective advocate to solicit for gifts.

Q3 HIGHLIGHTS

- ✓ A qualified individual applied, was interviewed and subsequently hired for the position with an April 1st start date.
- ✓ In preparation for this individual's start date, an initial portfolio of 250 leadership annual giving donors/prospects was constructed.

Q4 OBJECTIVES

- Fully onboard and orient the new Leadership Annual Giving Officer (LAGO)
- Integrate the LAGO into our fundraising team and familiarize him with our processes.
- LAGO begins initial outreach to portfolio and solicitation of prospects. Also plays a key role in outreach for the Day of Giving in April.

Status:

Lead: Kevin Hughes

Pillars: Engage

Date: 4/8/25

DESCRIPTION

Upgrade of existing annual giving position from entry level to frontline fundraiser who will be soliciting leadership annual fund gifts.

