

ANNUAL GIVING INVESTMENT

Start: July 2024

Finish: June 2025

Budget: \$18,497

Actual YTD: \$6,936

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.

Q4 HIGHLIGHTS

- ✓ Winthrop's new Leadership Annual Giving Officer (LAGO), Ryan Laughlin '17, began employment on April 1st and has been properly onboarded.
- ✓ In his third week of employment, Ryan played a critical outreach role for us in calling and emailing potential donors for the Day of Giving and also provided staffing coverage at our Upstate Giving Day Social.
- ✓ In Ryan's first seven weeks on the job he has already conducted 20 one-on-one donor meetings, and has conducted close to 600 total contacts (phone, email, meetings & social media outreach) with alumni.
- ✓ With just over five weeks left in the fiscal year, Ryan is actively working to renew lapsed donors prior to our June 30th deadline.

Status:

Lead: Kevin Hughes

Pillars: Engage

Date: 5/23/25

DESCRIPTION

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

