

Emergent Budget Proposal Narrative

Division: University Advancement – Leadership Annual Giving

Please check the appropriate category for this proposal and provide a brief (1-2 sentences) explaining the selection:

- Urgent unforeseeable items that have arisen since the FY17-19 budget build process
- Items calling for prompt action that are so critical they cannot wait until the FY20-21 biennial budget build process
- Items that have arisen as a consequence of changed conditions, such as, but not limited to:
 - a) additional enrollments,
 - b) a change in leadership at planning unit level, and/or
 - c) State or federal policy changes
- Time-sensitive strategic opportunities that advance the university toward strategic plan fulfillment and are of the highest priority

This position is time sensitive in that each year this position remains unfunded is another year that we leave many potential donors without more personal contact from our institution, and thus missing opportunities to ask them for support.

Statement of Purpose: *(What is the problem or opportunity being addressed? How will you address this problem or opportunity?)*

The **Director for Leadership Annual Giving** is a position that was in place a number of years ago, but was repurposed during the recent campaign in order to focus on major gifts at the college level. We believe it is critical to re-activate and fill this position in order to facilitate personalized follow up to secure leadership level annual gifts (\$1,000-\$24,999) and move our best annual giving donors up the giving pipeline. Currently we have identified numerous prospects who have the capacity to make an annual leadership gift including approximately 5,000 prospective donors who, through our research, we believe have an annual giving capacity of \$1,000 or more. 40% of the 1,400 President's Society members are currently not assigned to a major gift officer and therefore are not asked for an increased annual leadership gift. 237 donors who gave between \$500-\$999 last year are not scheduled for personal visits due to lack of staff time. All of these donors and potential donors would be contacted by this Director. These prospect numbers will continue to grow and only through focused and intentional management by a dedicated staff member will we be able to grow their gifts in support of key university initiatives.

This position is intended to provide personal outreach to secure new donors and prospects as well as new and renewed leadership annual gifts through direct solicitation of individuals with the capacity to make gifts of \$1,000 to \$24,999. It is vitally important that we grow these relationships as these donors are often the ones that make larger gift commitments in the future, first as a major gift of \$25,000 or more followed via their estate plans.

Anticipated Outcome(s):

This position will engage directly with prospects and donors to ensure their annual gifts are increasing to \$1,000 - \$24,999 through a minimum of 200 visits annually resulting in a 20% increase in leadership annual level gifts. In FY2016-17, 551 donors made a leadership annual gift and the gift average was \$3,300. Our two-year goal would be to increase this number by 20%; we project 660 donors contributing an additional \$364,000 in support of Western Washington University.

Additionally, as we move to the future fundraising and next major fundraising campaign leadership annual giving pipeline development will be ever more critical as this is the group that we would initially ask to consider campaign commitments.

Metrics: *(How will outcomes be measured?)*

Fundraisers are measured on their achievement of annual goals and targets. These goals are established annually by management and then tracked over the course of the year. It is a very straightforward measurement system.

How does this project support the University Mission and Strategic Objectives?

By helping to provide additional private financial resources for students, faculty and programs, these positions align very closely to the University mission and strategic objectives.

What are the consequences of not funding this package?

If this position is not funded, Western would miss out on additional private resources each year. University Advancement would fall behind in the quest to raise new dollars and to develop the pipeline for major and estate gifts.

What alternatives were explored and why was this alternative chosen?

There are no real alternatives to having people in these positions doing this kind of work. It is relationship-intensive that cannot be automated or outsourced.

Which units (departments, colleges, etc.) will be involved?

The Leadership Giving position will have a broad impact across all colleges and departments since all areas have some donors in that range.

Equipment: *(For major (>\$25k) purchases, please provide the following information.)*

Purpose:

No additional equipment would be required

Cost:

N/A

Anticipated Useful Life:

N/A

Replacement Cost if any:

N/A

Human Resources (replace example below with needed resources)

Example

- (1) 1.0 FTE

Operating & Maintenance Costs:

N/A

Space Requirements:

How much new space will be required?

The Director for Leadership Annual Giving may be based out of Seattle, so, space in Seattle could be a requirement.

Is appropriate space available on campus? Yes No

If no, what space is needed and what features must the space have (e.g., fume hoods, plumbing, 3-phase power, etc.)?

General office and meeting space only

WESTERN WASHINGTON UNIVERSITY
Director of Leadership Annual Giving

	FY19				Future Years Recurring (if different than FY19)			
	Employee FTE	One Time Costs	Recurring Costs	Total Costs	Employee FTE	One Time Costs	Recurring Costs	Total Costs
Faculty Salaries	0.00		\$ -	\$ -	0.00		\$ -	\$ -
Professional Salaries	1.00		\$ 65,000	\$ 65,000	0.00		\$ -	\$ -
Classified Salaries	0.00		\$ -	\$ -	0.00		\$ -	\$ -
Student Salaries (Graduate Assistants, Hourly Student, etc)	0.00		\$ -	\$ -	0.00		\$ -	\$ -
Benefits			\$ 23,146	\$ 23,146			\$ -	\$ -
Total Salaries & Benefits		\$ -	\$ 88,146	\$ 88,146		\$ -	\$ -	\$ -
Supplies and Materials				\$ -				\$ -
Professional Service Contracts (please detail below)				\$ -				\$ -
Equipment and Personal Technology - including new faculty set-up costs				\$ -				\$ -
Other Goods and Services (includes memberships, supplies, materials)				\$ -				\$ -
Total Goods and Services		\$ -	\$ -	\$ -		\$ -	\$ -	\$ -
Lodging				\$ -				\$ -
Automobile Rental				\$ -				\$ -
Air Travel				\$ -				\$ -
Ground Transportation				\$ -				\$ -
Other travel costs				\$ -				\$ -
Total Travel		\$ -	\$ -	\$ -		\$ -	\$ -	\$ -
Total Expenditures		\$0	\$88,146	\$88,146		\$0	\$0	\$0

POSITION TITLE	FY19						Future Years Recurring (if different than FY19)					
	Proposed Annual Salary	Headcount	FTE	Budgeted Salary	Benefits	TOTAL	Proposed Annual Salary	Headcount	FTE	Budgeted Salary	Benefits	TOTAL
Faculty Salaries												
Total Professors	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Total Associate Professors	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Total Assistant Professors	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Total Non Tenure-Track	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Faculty Salary and Benefit Total	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Professional Salaries												
Director for Leadership Annual Giving	65,000	1	1.00	\$ 65,000	\$ 23,146	\$ 88,146				\$ -	\$ -	\$ -
Exempt Staff Salary and Benefit Total	\$ 65,000	1	1.00	\$ 65,000	\$ 23,146	\$ 88,146	\$ -	0	0.00	\$ -	\$ -	\$ -
Classified Salaries												
Classified Staff Salary and Benefit Total	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Student Salaries												
Student Salary and Benefit Total	\$ -	0	0.00	\$ -	\$ -	\$ -	\$ -	0	0.00	\$ -	\$ -	\$ -
Total Salary and Benefits - All Positions	\$ 65,000	1	1.00	\$ 65,000	\$ 23,146	\$ 88,146	\$ -	0	0.00	\$ -	\$ -	\$ -