

2018 Development Plan and Calendar

“People, Programs and Productivity – A Multi-Year, Agency-Engaged Strategic Development Plan”

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2018 IPS Development Plan

The UT Institute for Public Service

Development in IPS is a team effort, with every member of the staff having a role and taking part. Everyone in IPS has a role in the development of the Strategic Plan, and the Development Plan is linked to and supportive of bringing the Strategic Plan forward. Many members of the IPS staff will also be involved in making contact visits, developing summaries of what we do and why, developing clear descriptions of the need for additional funds to meet the mission of IPS agencies, and contacting or supporting contacts to potential donors. We are also part of a university system with a culture of giving, and members of the staff have been generous in support of the University of Tennessee and the work of the Institute for Public Service.

The single largest issue to be addressed is to articulate the need, and why giving to IPS is important to IPS staff, customers, vendors and other supporters.

Building the Case for Support – Why Give to IPS

The key with development is that we're offering our supporters a chance to support the specific services and projects that they consider important. Gifts already underwrite a small percentage of existing IPS programs, and an expanded investment in people, programs and productivity will help us to continue to provide and to expand critical services.

Compelling reasons to support IPS are taken from the new Strategic Plan, with an outline of present and future programs, plans and needs of the agencies of IPS. These focus on the obvious – supporting the use of technology, creating internships, filling the gaps in staff development and retention, and creating a sustainable funding plans to maintain the future of critical IPS services in a changing environment. While the majority of the programs of IPS are funded in part by state appropriations, private funding is vital to the enhancement of future programs. Initiatives such as the statewide internship program for public service, additional training and scholarships for law enforcement personnel and the use of endowments to support consulting positions, for example, will require support from the private sector, individuals, associations and foundations. Every gift to the Institute for Public Service, no matter the size, makes an impact on the lives of Tennesseans through the institute's programs and centers.

Agency-wide support for private fundraising translates into sustainability for many

years to come. The combination of the Strategic Plan and an on-going and successful development effort will raise energy, excitement and support for the missions and agencies of IPS.

Accepting and Using Gifts – Making Stewardship a Priority

In IPS stewardship is considered both an internal and external activity. We raise funds for specific uses that sustain the mission of IPS, and we make certain that funds provided by donors are used in the way that the donor intended. In doing so we are good stewards and safeguard donated assets from mishandling and misuse. Using the funds as the donor intended is both an issue of integrity and an important part of maintaining long-term donor relations, and in IPS we treat stewardship and donor relations as interchangeable terms.

The gift acceptance and use process is important to this effort, and typically we follow the following steps:

1. Accept the donation. We accept appropriate donations (cash, checks and pledge letters) and forward these immediately to the Vice President’s office in IPS Administration:
 - a. Checks should be addressed to the UT Foundation, with either IPS or the individual agency listed in the memo line.
 - b. Gifts-in-kind may be accepted through the Vice President for Institutional Advancement with the UT Foundation.

The office staff makes certain that the donor is entered into ANDI, the UT Foundation’s tracking system, and forwards the contribution and paperwork to the Foundation. The office also notifies the assistant vice president and executive director of the gift received, with the donor’s name and amount of the gift.

2. Thank the donor. Anyone can and should thank the donor immediately, and both the Vice President and the agency director will follow up with thank you notes.
3. Recognize the donor throughout the year. Recognition is the public form of

Successful Campaigns Show:

Donors respond better to a specific appeal, with a compelling project or service to support and a timely reason to do so.

Be sure you have a clear goal that is tied to a specific project or outcome, even if it’s just keeping the lights on: our goal is 100% participation, so we ask that everyone participate.

Donors like to know that we are accountable and are focused. Be sure you let donors know your track record of producing measurable results. That may be the single greatest reason some donors will choose us over another organization.

donor acknowledgement. Some donors prefer anonymity, others have a preference on how their name is formatted, and all of these will be recognized based on their preferences. IPS offers extensive opportunities for recognition with a Gift Matrix:

- a. The IPS Public Service Society has been established for the Family Campaign, with recognition for members of staff donating at the silver (\$500-\$999) and gold (\$1,000 and greater) levels. Giving societies and honor rolls are also under development for each of the campaigns, with tiers to recognize different levels of gifts.
- b. Donor walls and named facilities or spaces are used as appropriate to recognize substantial and lifelong giving. One recent example is the naming of the Robert L. Watson, Jr. Research and Information Center within the Knoxville MTAS offices.

All naming opportunities for facilities and programs are submitted through the Foundation for consideration prior to approval.

- c. IPS also recognizes donors through donor profiles in newsletters and other publications.
 - d. On an annual basis and often combined with campaigns, IPS recognizes donor recognition events and provides awards, mementos and volunteer engagement opportunities.
4. Monitor expenses. The assistant vice president and executive directors are responsible for monitoring expenditure from gifts to ensure that they are being used according to donors' intentions.
 5. Reporting to donors. This is a critical final step in the process of accepting gifts. On an annual basis we send a formal note of thanks to donors and include a summary of how their gift has been used to improve the work of the Institute for Public Service.

The Leadership Role

The Executive Director's support in development activities is critical to the success of private fundraising, and typically this support includes the following commitments:

1. Work with the Vice President and through the Strategic Plan to develop a compelling reason to give to the agency.
2. Provide 5 contacts per month. Potential contacts include, at a minimum, association members and volunteers, customers, supporters, private consultants, corporations, and vendors supporting our associations and customers.
3. Participate in donor visits.

4. Thank donors with calls and notes.
5. Lead by example with Legacy and annual donations.
6. Encourage giving:
 - a. Staff, including new employees in orientation.
 - b. Advisory committee members.
 - c. Agency customers and stakeholders.
 - d. Agency and customer vendors.

Development Support

There is a role for central development support. This role includes planning the process, coaching and accompanying staff, and summarizing the results:

1. Serve as the process manager – keep the process and participants on task.
2. Work with the IPS Leadership Team to create and implement a development plan.
3. Work with agencies to develop visit packets and materials.
4. Work with Foundation for donor research.
5. Monitor, evaluate and adapt all fundraising activities.
6. Improve Foundation reports.
7. Provide summary reports for monthly team discussions – donations to agencies and endowments or gift funds.
8. Coach and coordinate meetings.
9. Accompany directors and staff on call.
10. Report and insure follow-up.

Who Does What and How - Making the Ask

Visits and requests are critical to thoughtful engagement with potential donors, and provide an opportunity to both highlight the good work of IPS and to outline the programs and services that need and deserve support.

We thank and re-thank donors, recognizing their gifts and encouraging continued future support.

Each visit requires coordination of staff and the donor or potential donor with a focus on building relationships and establishing a foundation for current and future development. Agency directors have been asked to identify up to 5 contacts per month and to make the connection for visits with these contacts. The administrative staff uses this contact list to prepare background information on donors to support personal visits, develops a visit packet, and assists with the personal visit.

There are a number of steps and messages to be delivered in each visit to help create a supportive relationship with potential donors:

- In advance of the visit always ask knowledgeable staff about the interests of the

donor and potential donors with similar interests.

During the visit:

- Always thank current donors.
- Approach the first visit as an “I’d love to hear your story” visit.
- Take the time during each visit to share information on specific projects and efforts.
- Inform and get advice from donors. Provide an informational overview of agency topics, issues and concerns, and request and follow the advice. Ask for opinions and feedback on new initiatives, projects and issues.
- Ask about project and development strategies – how can we be more effective while we raise funds for these or other services and projects that we provide?
- Ask about other potential donors that they can suggest or introduce us to that may have the same goals and interests.
- Ask specifically for their support. Are the services that we’ve covered one that they can support, or are there other services or projects that make sense for IPS agencies to provide that they can suggest and support?
- Don’t forget multi-year gifts. We can better plan when we know what to expect – can the donor consider making gifts over 3 or 5 years.
- This is a great time to ask about other potential donors that share the same interest as the person of company included in the visit.
- Again, thank the donor for their time. Make sure that we know how they want to be contacted so that we can update them on the status of projects that reflect their interest, and discuss the schedule for a follow-up visit.

The visit should focus on the relationship, not the request. Remember the old but true cliché – fundraising is friend raising, as we match potential donors with services that they consider important.

Giving to the University of Tennessee and IPS

The mission of IPS is quite simple – to serve and improve the state of Tennessee. We do so through five agencies, a staff of hard-working and knowledgeable professionals, and with the support of the university and the stakeholders that we serve.

Giving to support the agencies and work of IPS isn’t complicated and should be enjoyable as we work to continue critical services to exceptional employers and agencies. There are many different ways to give to IPS, including through specific campaigns, through on-going gifts, and through donations to areas of importance to the donor. The donation of time and volunteer services can be an important benefit to the services of IPS and are always welcome. IPS will acknowledge a gift of time and volunteer services, and recognize the value of actual expenses incurred (mileage, supplies, etc.)

IPS has established 5 different campaigns:

1. Family Campaign – Annually, with leadership society and annual reception.
2. Corporate/Vendor Campaign – Annually. These include vendors for cities, counties, law enforcement agencies and industries, and are coordinated with the Foundation to avoid potential conflicts in donor calls.
3. Political Pool Campaign – Conducted in campaign years. Agencies identify office holders or candidates with campaign funds remaining, and the campaign includes a structured follow up with candidates that lose or choose against running for re-election.
4. Legacy Campaign – On-going. The Legacy Society is the IPS planned giving campaign, and is summarized below.
5. Industrial Campaign – Annually with customers of CIS.

While generally these campaigns are self-explanatory, this development plan specifically elaborates on the Family Campaign and the Legacy Society. The Corporate, Political and Industrial Campaigns are targeted to specific customers and supporters, and follow similar steps and guides.

The Family Campaign

The members of the IPS staff have shown their commitment to Institute services every day through both hard work and through a commitment of resources through the family campaign. The family campaign should include all full- and part-time staff of IPS, including contract workers and special appointments.

IPS staff
are our
biggest
supporters!

In 2018 IPS combined the Family Campaign with that of the UT System, and the discussion is the same – we highlight the good work going on, we talk about our personal financial commitment to IPS services and projects, and we encourage our family to support our work:

Agency directors show their support in comments in agency-wide and team meetings. These comments often include a summary of what the director hopes for the agency to accomplish, how universities and agencies such as ours count on donor support, and about some of the projects that you personally support. Agency talks also and typically:

1. Summarize some of the projects completed over the past year with staff donations.
2. Aim for a goal of 100% participation.
3. Talk about giving through payroll deduction, and mention personal support.

The Family Campaign helps to show the staff commitment to better services and projects, and is important when we talk about giving to other customers, companies and

supporters. The Legacy Society offers staff and supporters a meaningful way to expand this support through a future gift from their estate.

The Legacy Society

IPS launched the Public Service Legacy Society in 2010 to honor individuals who remember the institute or one of its agencies – CIS, CTAS, LEIC, MTAS or the Naifeh Center for Effective Leadership - in their estate plans.



Membership is extended to anyone who includes the institute and its agencies in their will, or makes the institute or agencies the beneficiary or owner of a paid-up insurance policy or retirement plan. Donors who participate in various lifetime income plans the university has available also are eligible for membership.

Membership in the society is permanent; that is, it continues from year to year throughout the member's lifetime. The membership roster is displayed prominently in the institute's annual report with permission granted by the donor and as the Society grows members will be treated to special events and gatherings through the year as special guests of the institute.

Examples of donor estate plans include:

1. Making a bequest in a will or living trust.
2. Naming the institute as a full or partial beneficiary of a life insurance policy, IRA or other retirement plan, commercial annuity, bank account or brokerage account.
3. Creating a life income gift such as a charitable gift annuity or charitable remainder trust.

For further information, forms and assistance with becoming a Legacy Society member, please contact the assistant vice president responsible for development, or contact the Vice President's office in IPS Administration.

Volunteers and Donation of Volunteer Hours

IPS volunteers are individuals who contribute their skills, services or advice to IPS agencies. While non-profits often use volunteers to fulfill their mission, IPS does count on volunteers for specific roles, including service on advisory committees and with assistance to IPS staff and leadership with their perspectives and resources.

The donation of time and volunteer services can be an important benefit to the services of IPS and are always welcome. IPS will acknowledge a gift of time and volunteer services, and recognize the value of actual expenses incurred (mileage,

supplies, etc.)

Volunteers are also usually donors making an investment in time and leadership, and we hope to expand the use of volunteers in IPS as the strategic plan moves forward and as the development program grows. IPS volunteers could come from program alumni, retirees, strong customer supporters and former employees.

Annual Giving and Direct Mail

Annual giving has been a foundation for giving to many organizations, and with this development plan IPS has also implemented a direct mail campaign. With this campaign IPS will be contacting customers, companies and other supporters with direct response campaigns each year. These solicitations will allow either direct or electronic responses and seek smaller gifts from a broad base of constituents.

The message for these contacts will be that every gift makes a difference, no matter the amount, and provide a greater opportunity to talk about the good work and how IPS agencies are making a difference for customers, clients and the people of Tennessee.

So Why Give, and Why Raise Funds through Development?

The mission of IPS is quite simple – to serve and improve the state of Tennessee. The services of the agencies of IPS also require constant change, and as we work to expand internships, specialties, and services we also work to keep the funding streams that support IPS services sustainable.

People, Programs and Productivity represents what we do and why we raise funds. These funds are important for today and critical for tomorrow.

2018 Development Calendar

The UT Institute for Public Service

January — For 2018 It's Information Time

In future years this should be thank you time, with letters responding to a flood of gifts from December and particularly at year's end. For 2018 we are focusing on updating Foundation information and preparing material for the development year.

Agency directors are identifying up to 5 contacts per month and schedule and participate in visits with these contacts. The administrative staff prepares background information on donors to support personal visits. Each visit focuses on building relationships and establish the foundation for current and future development.

February - March — Time for the Family Campaign

The members of the IPS staff have shown their commitment to Institute services every day through both hard work and through a commitment of resources through the family campaign. The family campaign should include all full- and part-time staff of IPS, including contract workers and special appointments.

The campaign meetings are the same as a visit to other potential contacts – we highlight the good work going on, we talk about our personal financial commitment to IPS services and projects, and we encourage our family to support our work

May – Advisory Committee Meetings

We're planning for an all-inclusive meeting of advisory committees – let's be ready!

- Prepare for meetings of your committee during the same time as the large group meetings. Consider the agenda to cover both issues important to your agency and issues affecting all of IPS.
- Talk about the new strategic plan and about their role and schedule. Talk about the most important strategic issues facing your agency, and how these issues are or can be addressed through the new plan. Bring the members into this discussion.
- Schedule time for a discussion about unmet needs and development opportunities.

Online donations:

Nationwide 40 percent of online donors make their gifts in December, and 40-60percent of those donors give on December 30 or 31.

Ask about other potential but unidentified donors. Talk about the development process, and what they can expect – visits, contact lists and support. Invite them to give!

Downtime outside of the formal meeting gives your committee members a chance to socialize with staff and with each other. Coach the staff on talking about upcoming issues and the need for development.

August – It's Annual Conference Time

- During agency meetings plan to discuss the success of the family campaign, and thank the donors.
- Again highlight some of the projects completed over the past year with staff donations.
- Discuss the plans and issues facing your agency over the next 6 months and the most important strategic issues facing your agency. How are you going to deal with them?
- Thank the donors again!

September—Time for the Corporate Vendor Campaign

Using the lists prepared in July we'll start a campaign of personal visits and letters. We'll need:

- Descriptions about how their products and services are used in Tennessee
- Customer testimonials, with customers and consultants on the visit that can speak from first-hand knowledge.
- And what else?

Private Consultants and Vendors are Our Supporters and Colleagues, Serving the same Customers and Needs.

October—What about the Legacy Society?

- During agency meetings discuss planned giving and the Legacy Society.
- During advisory committee meetings do the same - discuss planned giving and the Legacy Society.
- Aim for a goal of 100% participation.
- Mention your personal support.
- Distribute material and talk about will amendments.

Planned giving doesn't have to be complicated.

- Set a deadline date for response.

November – How’d We Do?

We are wrapping up the year, so it’s time to evaluate our success over the past year, take a breath, and plan.

- Evaluate everything—our approach, our donor recognition events, and the support of the volunteers and staff involved in development for IPS.
- Reconfirm our fundraising priorities. What are we really raising money for? Are these compelling, even emotional needs? What else do we need to promote? Can we find some new special donor– friendly projects to promote?”

Consider changing your Web page to simply say, “Your gifts at work,” and ...

- List your advisory committee members
- Include testimonials
- Add any endorsements

December—Celebrate and Thank Our Donors!

This month the focus will be with year-end wrap up, and thanking those that need us, support us and make us necessary.

So this month focus on appreciating everybody! Send holiday wishes to staff and to donors who help make our work possible. Take time out to thank your advisory committee members for all they do for the cause.

Call out the troops; put your board members and key volunteers making plans for the New Year, and thank them, thank them, thank them.