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Information Services and Prospect Research staff listing
Mary Jane Lowney (Director of Advancement Operations) – 487-2312 – mjlowney@mtu.edu
Contact for reporting needs other than mail and email lists

Tonia Bickford (Business Systems and Data Analyst) – 487-2541 – tsbickfo@mtu.edu
Send mail and email list requests to Tonia or dis-l@mtu.edu

Sandra Kent (Office Assistant 5 – Prospect Research) – 487-1497 – sjkent@mtu.edu
Send contact reports to Sandra Kent

Mike Olson (Research Analyst) – 487-4334 –olson@mtu.edu
Contact Mike for updated research, missing phone numbers, addresses, assistance with
prospect identification
ADVANCEMENT TOOLS AND TIPS

Handout A

Internal Query Tools – www.banweb.mtu.edu/mtu/mtf/menu (Use Mozilla Firefox for best results)

(1) Use your ISO (email) password to enter the Internal Query Tool
(2) You’ll need to enter your Banner password to run some of the reports
(3) If you don’t remember your Banner password you can use the link at the top of the menu to reset your password

NOTE: If you don’t have authorization for any of these activities you can find a request for authorization at http://www.mtu.edu/giving/pdfs/banner-access.pdf. Please fill it out and send it to dis-l@mtu.edu.

TRIP PLANNING

1) Who to visit
   a) Your departmental liaison and the Prospect Research department of the Office of Advancement will be happy to help you identify your top prospects. See the attached Table I – Liaison Assignments or contact Mike Olson (olson@mtu.edu) for assistance.
   b) If you know that you’re going to a specific city, the following tool can be used to identify your top prospects in that area.
      i) Login to the Internal Query Tools (Use Mozilla Firefox for best results)
         (1) Use your ISO (email) password to enter the Internal Query Tool
         (2) You’ll need to enter your Banner password to run some of the reports
      ii) Choose Departmental Alumni Visit Report for a list of your alums sorted by highest probability within a zip code radius
         (1) Select top candidates using one or more of these scores as a guideline:
             (a) Ability score over 59 OR 0 (zero) if you want all alums in the area
             (b) Inclination score over 24 OR 999 if you want to ignore it
             (c) Affinity score over 9 OR 99 if you want to ignore it
             (d) Click Submit Query button
         (2) Coordinate activity with Prospect Manager (MGR column on report – see attached Table II – Prospects Managers)
             (a) Review giving history
             (b) Review if any planned giving inquiries
             (c) Check if there is a Gift Society gift to be delivered
         (3) Review the Profile Report – click on the alum’s M# on the Visit Report to see the Profile
         (4) If there are any prospects without employment information, or that you’d like more information than is in the Profile Report, email Mike Olson at olson@mtu.edu and ask him to update the research.
         (5) Schedule Appointments
ADVANCEMENT TOOLS AND TIPS

Handout A

2) What to take
   a) A printed Profile for each constituent – for your use, this contains confidential data not intended to be shared with the donor.
      i) Choose Profile Reports from the Internal Query Menu
      ii) Show/Hide the sections so you have just the information that you want printed showing
   b) Alumni Departmental Reports – Choose Alumni Departmental Report
      (1) A one page demographic report of departmental statistics
      (2) Can also be run for class year, geographically, or by activities
   c) Tech swag – pens, key rings, notebook, etc
   d) Recent publications eg., department report or newsletter, Research Magazine, LODE, etc.
   e) Points of discussion.
   f) Objectives of visit.

3) The Visit
   a) Discuss their family and career, Michigan Tech, etc
   b) See handout Strategic Questions for Engaging Donors – from Wealth Engine
   c) Take note of photos, certificates, personal interests
   d) Thank them for their support
   e) Ask why they give/What do they want to accomplish with their philanthropy
   f) Listen more, talk less.

4) After the Visit
   a) Email a synopsis of your contact to Sandra Kent at sjkent@mtu.edu.
   b) Include:
      i) The date of the visit
      ii) Where the visit occurred – at home, business, restaurant
      iii) A summary of the visit including topics discussed, questions answered, concerns raised, and your conclusions or opinions
      iv) Financial information that is not in the profile report
      v) Job title, promotions, etc
      vi) Personal assets – house, vacation home, cars, boats, art, etc
      vii) Personal interests – travel, hobbies, civic involvement, philanthropic activity, etc.
      viii) Next Action – any follow up activity
   ix) Recognition opportunities – is this person a good candidate for an advisory board, Alumni Association Award
   x) See handout Example of a meaningful contact report
Strategic Questions for Engaging Donors and Prospects in Values Based Conversations

Questions Related to the Prospect’s Perceptions of Your Organization

1. How did you first hear about Organization?
2. How much do you know about the work we do?
3. Do you have any questions about our mission, vision or the work we do that I could answer?
4. What are your overall impressions of Organization?
5. What do you think of our web site, publications and communications?
6. How do you get information about us? (email, newsletter, etc.)
7. Do you know any of our staff or board members?
8. Do you believe our leadership is taking the organization in the right direction?
9. Do you have any concerns or comments you’d like me to share with our leadership?
10. Do you know any others who support Organization?
11. What do you think the perception of Organization is in your community?
12. How do you think we could let people in your community know about the work we’re doing?
13. Are there ways you could help us with that?
14. Do you feel the work Organization is doing is meeting a need in your community or the world community?
15. Is there anything else you think we could or should be doing to further our mission?
16. Is there a need or particular area with a need that you feel is currently unmet?

Questions that may come from Observations in the Home or Office

1. Do you have children? Grandchildren? (Try to obtain names, ages, occupations, schools attended, where they live, etc.)
2. Do you get to travel much? Where to? What is your dream vacation?
3. Do you enjoy entertaining? Do you entertain for business? Have you ever entertained for philanthropic purposes? Tell me about that.
4. How is business?
5. Is the current economy helping (or hurting) business?
6. I love your artwork. Where did you get this?
Questions that Concern other Charitable Interests

1. Are there other organizations you support?
2. Do you serve on charitable boards? Are you an active volunteer for any organizations?
3. Do you and your spouse make giving decisions jointly, or do you each make your own giving decisions?
4. How are you involved with other organizations you support?
5. How can we get you more involved with Organization?
6. Would you be interested in helping us identify, educate and engage others?
7. What do you expect from charitable organizations you contribute to?
8. How have other organizations demonstrated to you the impact of your giving?
9. If we could demonstrate to you our appreciation for your philanthropy, would you prefer:
   1. Something named for you or someone you love?
   2. Meeting some of the people you've helped?
   3. Hearing from some of the people you've helped?
   4. Receiving a report on how your money has been spent?
   5. Or something else?

Values-Based Lifestyle Questions

1. Do you belong to a faith community? How are you involved?
2. Did you learn philanthropy from your family?
3. How and why did you choose your life's work?
4. What do you attribute your business success to?
5. Do you have some overarching principles that have guided you in business or in life?
6. What achievements are you most proud of?
7. What do you hope to do in retirement?
8. How does our mission intersect with or complement your beliefs?
9. What life-lessons do you hope to pass along to your children or grandchildren?
Original Report -

I met with Ali at the Pershing Square Café across the street from Grand Central Station. Ali is interesting guy and has many projects going on with his company. He talked about the tunneling project they have currently under the river and which will run under Grand Central Station. The tunnel is 85 ft wide x 65 ft high. In addition, they are working on one of the largest residential projects in the area; the project encompasses four city blocks. They also have a large project with the Washington bridge. After breakfast Ali had meetings scheduled with Union leaders and was planning on entertaining lobbyists and elected representatives that evening at the Fleetwood Mac Concert at Madison Square Garden. Ali and his wife have four children among them, this is the second marriage for both. Ali has two grown sons and a stepson and stepdaughter. They are expecting their first grandchildren after the first of the year. One son is having a baby and another is having a set of twins. Ali talked about his pride for Tech and how he believes Tech is the best at preparing people with the knowledge and the practical experience to get the job done. He also feels very strongly that the university needs to get students more experience in “city build” projects as he thinks that all of the big construction will continue to be in major urban areas. Ali has been very active in the profession and is an executive trustee of the “Moles group” for the Underground Construction Association of SME. He indicates that he is willing to give at more significant level than he has done up to this point and is also going to look into matching gifts through Tutor Perini.

Breakdown:

WHO and WHERE: I met with Ali at the Pershing Square Café across the street from Grand Central Station. NOTE: Please specify last names if not the same as the person that you meet.

BUSINESS: Ali is interesting guy and has many projects going on with his company. He talked about the tunneling project they have currently under the river and which will run under Grand Central Station. The tunnel is 85 ft wide x 65 ft high. In addition, they are working on one of the largest residential projects in the area; the project encompasses four city blocks. They also have a large project with the Washington bridge. After breakfast Ali had meetings scheduled with Union leaders and was planning on entertaining lobbyists and elected representatives that evening at the Fleetwood Mac Concert at Madison Square Garden.

FAMILY: Ali and his wife have four children among them, this is the second marriage for both. Ali has two grown sons and a stepson and stepdaughter. They are expecting their first grandchildren after the first of the year. One son is having a baby and another is having a set of twins.

INTEREST IN TECH: Ali talked about his pride for Tech and how he believes Tech is the best at preparing people with the knowledge and the practical experience to get the job done. He also feels very strongly that the university needs to get students more experience in “city build” projects as he thinks that all of the big construction will continue to be in major urban areas.

OTHER INTERESTS: Ali has been very active in the profession and is an executive trustee of the “Moles group” for the Underground Construction Association of SME.

PHILANTHROPY INTENT: He indicates that he is willing to give at more significant level than he has done up to this point and is also going to look into matching gifts through Tutor Perini.
Other Engagement Opportunities

STEWARDSHIP

Who and how to thank

A. Send monthly thank you notes to donors
   a. Login to the Internal Query Tools:
   b. Choose Departmental Donor Reports
      i. Gifts, pledges, and pledge payments are separated
      ii. Full instructions are included at the bottom of the page

B. Invite donors to departmental functions
   a. There is a form for requesting mailing lists at –
      http://www.mtu.edu/giving/pdfs/Information%20Services%20Department%20Mailing%20Request%20Form.pdf
   b. And another for requesting email lists
      http://www.mtu.edu/giving/pdfs/Information%20Services%20Email%20Request%20Form.pdf
   c. Scan and email the requests to dis-l@mtu.edu

C. Recognize donors in newsletters
   a. Consult with liaisons and prospect research department for suggestions
   b. There is a form for requesting donor lists at –
      http://www.mtu.edu/giving/pdfs/Information%20Services%20Donors%20Request%20Form.pdf
   c. Scan and email the request to dis-l@mtu.edu

D. Scholarship recipients
   a. Coordinate with Financial Aide and encourage students to send personal notes
   b. Coordinate meeting recipients if donors are on campus

E. Send birthday, anniversary, congratulations, or holiday cards.
F. Share recent press releases via mail or email
G. Add a personal sticky note to departmental newsletters
H. Ask for advice on a specific topic

ADVANCEMENT OFFICE ACTIVITY

1) Who is visiting/contacting your alums
   a) Login to the Internal Query Tools:
   b) Choose Contact Histories
   c) Select your department
   d) Select the date range you’re reviewing
   e) Select if you want to review only visits or both visits and other contacts
   f) Click Show Contacts button
ENGAGEMENT EFFORTS WITH CORPORATIONS

Contact Advancement Information Services for reports by industry.
Coordinate with Corporate Partnerships staff.
Use the Internal Query Tool Corporate Profile to review information and current activity with the corporation, similar to how it was used for individuals.

Sample of available data:

Number of alumni employed and who they are
Key contacts at the company
Subsidiary/division/merger information
Giving history
Sponsored research activity
Contact histories
Annual Giving - Who we are and how we can help

About us

Michigan Tech’s annual giving team is charged with raising annual gift dollars to benefit current needs at the University. Our donors/prospects consist of alumni, parents, faculty/staff, community members, and other friends.

We raise funds for a variety of annual campus programs and initiatives each year. These include unrestricted gifts, annual scholarship dollars, academic departments, and virtually every area of campus.

We utilize marketing channels that help us reach the broadest group of individuals – direct postal mail, direct e-mail, telemarketing, and social media.

How we can help departments

When we contact alumni, they are always presented the option of designating their annual gift(s) to their academic department. This is also an option on our pledge cards that go with mail pieces. It’s also included as part of our calling scripts.

Have a special need/program that you are looking to raise funds from your alumni?

We can prepare a mailing list of your alumni. We can break this list out by current donor, lapsed donors, and never givers – to better target messaging.

We can work with you on a letter and help coordinate with UMC’s print and mail services area to have the letter printed, addressed and mailed.

We will set up and print a pledge cards specific to your project/program. We can also supply postage paid reply envelopes.

We always recommend you contact us (annual giving) prior to any mailing are you considering, so we can add it to our schedule and avoid any conflict with another mailing.

Annual Giving Staff

Paula Nutini (Director of Annual Giving) – 487-3609, pinutini@mtu.edu

Jennifer Biekkola (Manager of Student & Young Alumni Engagement) – 487-1056, jrbiekkko@mtu.edu

Lorrie Graff (Annual Giving Programs Coordinator) – 487-1925, lgraff@mtu.edu

Steven Dobbs (Marketing & Communications Manager) – 487-2400, srdobbs@mtu.edu

Adam Portmann (Annual Giving Campaigns Manager) – 487-2542, aportman@mtu.edu
Table I

Campus Liaisons – AO Assignments

Eric Halonen:
- College of Engineering – Wayne Pennington
  - Chemical Engineering
  - Institute for Leadership and Innovation
- College of Science and Arts – Bruce Seely
- Graduate School – Jackie Huntoon
- School of Business and Economics – Gene Klippel
- School of Forest Resources and Environmental Science – Terry Sharik
- School of Technology – Jim Frendewey

Karla Aho:
- Computer Science

Randy Heinonen:
- Athletics

Chris Hohnholt:
- School of Forest Resources and Environmental Science

Dale Kero:
- Civil and Environmental Engineering

Ben Larson:
- College of Science & Arts
  - Biological Sciences
  - Chemistry
  - Humanities
  - Kinesiology and Integrative Physiology
  - Social Sciences
  - Visual and Performing Arts
- Graduate School – Jacque Smith

Nathan Ruonavaara:
- Electrical and Computer Engineering
- Geological and Mining Engineering and Sciences
- Seaman Mineral Museum

Connie Scott:
- Corporate Partnerships
- Materials Science and Engineering
- Physics
- Van Pelt/Opie Library

Rex Wilson:
- School of Business and Economics
- School of Technology
- Biomedical Engineering

March 24, 2014
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<tr>
<th>Code</th>
<th>Name</th>
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<tr>
<td>ACJ</td>
<td>Adam C. Johnson</td>
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<tr>
<td>BAL</td>
<td>Benjamin A. Larson</td>
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<td>BB</td>
<td>Brent J. Burns</td>
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<td>BGH</td>
<td>Brian G. Hannon</td>
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<td>CH</td>
<td>Christopher A. Hohnholt</td>
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<td>Connie Scott</td>
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<td>DJK</td>
<td>Dale J. Kero</td>
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<td>EJH</td>
<td>Eric J. Halonen</td>
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<td>GDM</td>
<td>Dr. Glenn D. Mroz</td>
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<td>Jim Desrochers</td>
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<td>KOA</td>
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<td>Leslie P Cook</td>
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<td>NER</td>
<td>Nathan E. Ruonavaara, Jr.</td>
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<tr>
<td>PJC</td>
<td>Peter J. Cattelino</td>
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<td>PJN</td>
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<td>Randy P. Heinonen</td>
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### Table III

**Prospect Status Codes for Individuals**

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<td>Ask this Fiscal Year</td>
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<td>Ask made – long term cultivation (to close)</td>
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<td>B</td>
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<td>C</td>
<td>Ask within 3 years</td>
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<td>Permanent Stewardship</td>
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<td>E</td>
<td>Active Stewardship</td>
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<td>G</td>
<td>Annual Giving &gt; $1,000</td>
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<td>H</td>
<td>Annual Giving &lt; $1,000</td>
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<tr>
<td>I</td>
<td>Awaiting qualification</td>
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<td>N</td>
<td>No interest in meeting and/or “no contact of any kind”</td>
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<td>Pending Qualification (by an AO)</td>
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