University Life Donor & Alumni Engagement Process
with Development & Alumni Relations (DAR)

University Life works collaboratively with Development & Alumni Relations to strategically address funding priorities or engagement opportunities.

Donor/Alumni Reaches Out to University Life Director

Director Checklist:
- Upon initial outreach from donor/alumni, respond and tag in Director of Strategic Partnerships (DSP).
- AVPs are notified, if necessary.

Considerations include:
- Like Penn, Development is also decentralized, with teams in both Central DAR or most Schools and Centers.
- Reviewing the list of alumni you intend to solicit allows us to coordinate with prospect managers who might already be working with a subset of your alumni.
- We give prospect managers the opportunity to hold off on an alumni if it makes sense strategically.

If proceeding:
DSP engages Alumni Relations or Development.

If not proceeding:
DSP responds (CCs director) to thank donor/alumni for interest.
Pivot alumni attention elsewhere, if necessary.

Director of Strategic Partnerships (DSP) Checklist:
- DSP, director, donor/alumni meet (DSP will loop in DAR here if alumni has existing prospect manager). Data is recorded in Compass, the donor and alumni database.

University Life Reaches Out to Donor/Alumni

Director Checklist:
- Notifies DSP that outreach to a donor/alumni is happening;
- Reaches out to donor/alumnus.
- AVPs are notified, if necessary.

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Director of Strategic Partnerships (DSP) Checklist:
- DSP responds (CCs director) to thank donor/alumni for interest. Pivot alumni attention elsewhere, if necessary.

University Life Seeks Funding for Strategic Priority

Director Checklist:
- Director approaches AVP with funding priority (approval granted).
- Director engages Director of Strategic Partnerships with funding priority.
- Director should provide DSP an estimated range for the project and general impact details (e.g., $XX would support # of students).

Questions to consider:
- What is it you want to raise money for and does it align with divisional priorities or departmental goals?
- How much would it cost to implement your idea?
- Is there an opportunity for partial funding or does the initiative need the full amount to move forward?

Director of Strategic Partnerships (DSP) Checklist:
- Engages Development and/or Alumni Relations.

If feasible:
DAR finds donor prospects.

If not feasible:
Strategic Planning & Communications amplifies / creates a strategy to address need.

Director of Strategic Partnerships (DSP) Checklist:
- If a substantial gift is made to your department, Central is responsible for coordinating the following with DAR & Director:
  - Thanking donor for contribution
  - Notifying AVPs, DAR staff, and relevant campus partners.
  - Announcement or promotion of gift externally.
  - Coordination of logistics with Finance teams and online giving, if needed.

If feasible:
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If not feasible:
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