

# 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.

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## Donor/Alumni Reaches Out to University Life Director

*This process is only intended for donor/alumni inquiry related to making gifts or alumni engagement outside of your regular initiatives.*

### Director Checklist:

- Upon initial outreach from donor/alumni, respond and tag in Director of Strategic Partnerships (DSP).
- AVPs are notified, 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 or giving history with DAR.)
- ✓ Data is recorded in Compass, the donor and alumni database.



**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.

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## University Life Reaches Out to Donor/Alumni

*This process is only intended for engagements in which a Director has a specific DAR-related request for a donor/alumni.*

### Director Checklist:

- Notifies DSP that outreach to a donor/alumni is happening;
- Reaches out to donor/alumnus.
- 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 sub-set of your alumni.
- ✓ We give prospect managers the opportunity to hold off on an alumni if it makes sense strategically.



### 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.



**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.

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## 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 (eg. \$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.

