


Advancement Services and Operations

PLANID: 1149

Academic Quality

2. Advancing Exploration, Innovation and Achievement in Scholarship, Research and



2.3 Provide research services to a pilot ORU to support PIER

Action/Strategy	Measurable/Milestone	Status
2.3.1.a Pilot support for prospect research for Refugee ORU	Major gift prospects identified and positive feedback from ORU	 On Track

Student Success

4. A Student-Centred Approach




4.2.1 Support Strategic Enrolment

Action/Strategy	Measurable/Milestone	Status
4.2.1.a Provide access to alumni live data	Feedback from Recruitment regarding the quality of the AlumniLive data provided	 Completed
4.2.2.a Work with RO and OIPA to determine quality of data for recruitment	University data strategy created University data strategy implemented. Reduced cost of obtaining and updating data. Quality of data improved	 Progressing

Engagement and Outreach

6. Enhanced Community Engagement

6.1.3 Support Development and Alumni Engagement by providing quality information for strategic decision making by developing data management and governance strategies

Action/Strategy	Measurable/Milestone	Status
6.1.1.a Support the implementation of Target Analytics prospect scoring	Self serve reporting of prospect scores and campaign reports. Improved data quality	 On Track
6.1.1.b Improve campaign reporting by developing new Development and Alumni dashboards in E-reports and BI.	Self serve reports for campaign Ability to measure KPIs	 On Track
6.1.1.c Build a data governance and management team to improve the collection and quality of data as an asset to support strategic decision making.	Team created Data Governance Strategies Defined	 Progressing


Enabling the Plan

7. Enabling the Plan




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7.1.3 Support Alumni Engagement, York International and C&PA through ceremonial engagement opportunities

Action/Strategy	Measurable/Milestone	Status
7.1.1.a Create Pilot international graduation ceremony to support York International engagement activities to support the internationalization strategy	International engagement participation is 100+ Positive feedback from participants	 Progressing

7.1.4 Identify gaps in Development processes, infrastructure, pipeline and resources that would impede ability to sustain and perpetuate a \$50 million goal annually.

Action/Strategy	Measurable/Milestone	Status
7.1.5 Utilize data analytics in order to increase strategic donor engagement and Development Officer activities for the purpose of increased donations. Make use of pre-built dashboards and tools that accompany the Blackbaud suite, in order to improve the ease of reporting, uncover unknown prospects and define giving segments within our alumni.	Have data analysed by Blackbaud. Reports created and accessible. Training delivered. Unknown prospects identified	 Completed
7.1.6. Improve report accessibility in order to provide business critical information to the VP, AVP, SDOs, Manager Annual Giving, Call Centre Manager and other stakeholders regarding business results, pipeline information, prospecting, forecasting etc.	A suite of usable, flexible and accessible reports are available for use.	 On Track
7.1.5 Closely align research outputs with Development needs in order to maximize SDO and Researcher time, reduce wait times for research, allow for data analysis and increase/enable identification of prospective donors.	Effective and focused research delivered on a mutually agreed upon timeline.	 On Track


7.10.1 Improve the quality of services to donors

Action/Strategy	Measurable/Milestone	Status
7.10.1.a Improve gift processing services for pledge reminder and acknowledgement letters	Pledge reminders issued in a timely manner Acknowledgment letters issued in a timely manner Service level determined with client	 On Track
7.10.1.b Implement endowment automation	Endowments reports are produced before September Error reduced Effort reduced	 On Track
7.10.1.c Provide gift processing services in the uk for UK resident donors	Uk Donations processed Gift aid collected Charity administered	 Completed



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7.11.1 Expand University Events & Ceremonies Services to the faculties

Action/Strategy	Measurable/Milestone	Status
7.11.1.a Pilot the augmentation of University Events and Ceremonies services using a third party to support faculty events	9.2.1.a Faculty adoption of central events management service.	 On Track



7.12.1 Support Alumni Engagement's targeted growth of geographic and interest-based alumni networks, ensuring alignment with strategic priorities York International in development of alumni network.

Action/Strategy	Measurable/Milestone	Status
7.12.1.a Provide quality regional alumni data to support strategic engagement		 On Track
7.12.1.b Research and trace alumni network prospects to support Alumni Engagement objectives		 On Track

7.12.2 Identify and implement cost efficiencies through system integration, automation, contract review, streamlining of processes and elimination of work not aligned to the core priorities and IRP.

Action/Strategy	Measurable/Milestone	Status
7.12.2.a Automate tasks where possible working with business stakeholders to capture requirements.	Efficiencies Reduction in human errors User satisfaction	 Progressing
7.12.2.b Integrate systems to create efficient processes to support the client experience.	Efficiencies Reduction in human errors User satisfaction	 Progressing








7.4. Promote quality management principles to ensure effective and consistent service to all our internal and external partners and communities.

Action/Strategy	Measurable/Milestone	Status
7.4.1 Financial System Process Improvement -- Reduce the number of pledge write-offs, increase the pledge fulfilment rate and improve the donors' pledge experience through the review of the Pledge Payment Process.	Increased pledge fulfillment rate	 On Track
7.4.2 Reduce the number of gifts in holding. Ensure all funds are fully utilized, in the proper allocation and donor reporting is completed on a timely basis.	Reduced the number of gifts that go into holding. A clear process established.	 On Track


Integrated Resource Plan 2018-2019

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7.4.3 Reduce the occurrence of funds left unspent, unknown and unreported. Commit to York's fiduciary responsibility to faculty and donors.	Reduced number of gifts that go unspent A clear process established.		Progressing
7.4.4 Determine who creates cost centres for donations (500, 600) and ensure the process is communicated to the Development team. Ensure all donor funds are designated correctly.	Easy creation of allocations and cost centres.		Completed
7.4.5 Working with gift processing and finance and the reporting team, ensure the ability to report accurately and confidentially on cumulative lifetime giving and all other giving milestones.	Accurate financial reporting as validated consistency across multiple reporting platforms		On Track
7.4.6 Create a management service culture with services focused on customer experience and requirements	Client satisfaction improves		On Track
7.4.7 Define processes and protocols required to deliver standards and service levels.	SOPs created and reviewed		On Track
7.4.8 Create service measures to ensure the service performed to a known quality	KPIs identified		Progressing
7.4.9 Develop a Division of Advancement budgeting process to ensure the budget aligns to the IRP for the Division.	Budget is aligned with IRP objectives		Completed

7.5. Provide all team members with access to objective setting, reviews and quality feedback.

Action/Strategy	Measurable/Milestone	Status
7.5.1 Attract and retain the necessary people talent required to successfully meet and exceed Development goals and aspirations.	*All Jobs roles clearly defined and documented. *All PMPs completed on time. *Retention ladder completed and implemented. *Regular 1:1 scheduled and occurring.	 Completed





7.6. Ensure success of staff through 'on-boarding', mentoring, professional and career development opportunities.

Action/Strategy	Measurable/Milestone	Status
7.6.1 Attract and retain the necessary people talent required to successfully meet and exceed Development goals and aspirations.	Training and leadership opportunities provided. Regular 1:1 scheduled and occurring.	 Completed






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7.7. Invest in and instill management, leadership and team building competencies.

Action/Strategy	Measurable/Milestone	Status
7.7.1.a Attract and retain the necessary people talent required to successfully meet and exceed goals and aspirations.	Collaborative well communicating and supportive team environment.	 On Track
7.7.1.b Instill leadership competencies in recruitment, performance management and professional development in directors and managers	Improvement in Staff Engagement score	 On Track
7.7.1.c Invest in and instill management principles for building high performance team through coaching and a collaborative culture.	Improvement in Staff Engagement score	 On Track
7.7.1.e Ensure individual goals are aligned with IRP and support the academic plan	Improvement in Staff Engagement score	 Completed



7.8 Create a better workplace

Action/Strategy	Measurable/Milestone	Status
7.8.1.a Identify staff engagement drivers to celebrate and action.	Staff Engagement score improves	 Completed
7.8.1.b Provide all team members with access to objective setting, reviews and quality feedback.	Goals set and reviews completed	 Completed
7.8.1.c Ensure success of staff through 'on-boarding', mentoring, professional and career development opportunities.	Improvement in Staff Engagement score	 Completed
7.8.1.d Support well being, diversity and inclusivity in all of our fundraising and engagement activities, as well as in the workplace.	Improvement in Staff Engagement score	 Completed
7.8.1.e Build a healthy workplace environment that support mental well being, promoting physical activity and inclusion.	Improvement in Staff Engagement score	 Completed

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7.9.1 Improve systems to provide a friction free service to alumni and donors expanding delivery of the engagement services to faculties

Action/Strategy	Measurable/Milestone	Status
7.9.1.a Implement Imodules Encompass engagement software for events management and online giving	Donor and alumni satisfaction increases, Reduction in complaints	 On Track
7.9.1.b Develop service delivery processes in collaboration with Alumni Engagement to support the adoption by the faculties of Imodules for events and alumni email	Reduction in effort to support service Positive feedback a quality service	 On Track

