


Development


Engagement and Outreach
5. Enhanced Campus Experience

5.1.1 Continue working with Faculties, ORUs and VPRI to maximize University funding and research opportunities, grow community and private sector engagement.




Action/Strategy	Measurable/Milestone	Status
5.1.1.1 Understand capital projects that require fundraising support at Faculty and Pan University levels. Engage in development strategy post Presidential and CSBO approvals for such projects.	All capital projects in need of philanthropic dollars are identified and prioritized.	 Progressing

Engagement and Outreach
6. Enhanced Community Engagement

6.1.1 Reach \$500 million goal in the Impact Campaign and reach milestones in all three campaign focuses.

Action/Strategy	Measurable/Milestone	Status
6.1.1 Achieve fundraising goals	6.1.1 Achieve campaign goal of \$500 million	 On Track

6.2.1 Continue working with Faculties, ORUs and VPRI to maximize University funding and research opportunities, grow community and private sector engagement. This will underscore the value of Advancement (Development) to the faculties and University wh

Action/Strategy	Measurable/Milestone	Status
6.2.1.1 Understand and document all faculty funding priorities as formulated by the Deans in the individual faculties. Create strategies for acquiring the necessary funding in collaboration with the SDOs. Mobilize SDOs in order to maximize their fundraising capabilities for these key priorities.	*Clearly documented funding strategies for all faculties. *Documented SDO strategies that articulate plan for meeting faculty goals for funding	 On Track
6.2.1.2 Work with VISTA and the Homelessness NEC to understand key funding priorities in accordance with Presidential strategy. This will support York research and university brand, expand research capacities and help alleviate budgetary constraints within these Centres. In working with these two groups establish processes and best practices for engaging and supporting other successful (organized to a point where funding strategy can be articulated) ORUs.	*Clearly documented funding strategies for all faculties. *Documented strategies that articulate plan for meeting faculty goals for funding	 On Track
6.2.1.3 Continue to consult with VPRI regarding mutually beneficial relationships for philanthropy and research. Share, broaden and deepen relationships with private sector, alumni and public constituents.	All eligible research philanthropic dollars are identified and acknowledged.	 On Track


Integrated Resource Plan 2018-2019

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6.2.1.4 Understand capital projects that require fundraising support at Faculty and Pan University levels. Engage in development strategy post Presidential and CSBO approvals for such projects.

All capital projects in need of philanthropic dollars are identified and prioritized.



 On Track

6.2.1.5 Continue to build upon existing relationships with Schulich, Osgoode, and other faculties and colleges for the purposes of cross collaboration, improved clearance processes and the leveraging of Central Advancements resources to support their efforts.




Improved communication and increased engagement with partners.

 Progressing

6.3.2 Develop a strategy for a more comprehensive approach to engage with Corporations and Foundations. Understand and act upon University strategy and policy as it pertains to campus wide sponsorships. (Potentially help articulate this policy -- naming

Action/Strategy	Measurable/Milestone	Status
6.3.2.1 Ensure SDOs are enabled to maximize corporate and foundational relationships philanthropically and through sponsorships. Ensure all corporate partnerships are deep and wide (recruitment, co-op opportunities, sponsorships, experiential learning partnerships, philanthropy) in order to comprehensively enrich the University.	Increased engagement with corporations and foundations.	 On Track
6.3.2.2 In accordance with Presidential strategy act upon Pan University corporate sponsorship opportunities.	Articulation of University sponsorship policy complete.	 On Track

6.4.1 Increase SDO call activity in order to increase donor engagement and dollars raised.

Action/Strategy	Measurable/Milestone	Status
6.4.1.1 Provide Administrative Support – Introduction of Development Coordinators. These positions are expected to decrease the amount of time and effort that the SDOs currently spend on activities that interfere with revenue generation and are unrelated to their job descriptions, PMPs and goals.	Dev Coordinators in place and assigned to SDOs.	 Completed
6.4.1.2. Establish accurate Reporting – Track fundraising progress (during and post Campaign), audit health of the pipeline, utilize pledges coming due and final pledge reports, develop “kitchen sink”, “push” and “current prospect” reports. Over time define team and SDO close rate.	Create useful and functional reporting that tracks Development objectives.	 On Track
6.4.1.5 Articulate new SDO goals.	PMPs written and complete for Dev Coordinators and SDOs.	 Completed

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6.4.1.6 Mobilize AVP and ED Principal Gifts


AVP and ED Principal Gifts fully functioning.

 Progressing


6.4.2 Build strong collaborative and mutually beneficial Alumni/Development programming for the purpose of increasing alumni engagement and alumni giving (time, talent and philanthropy).

Action/Strategy	Measurable/Milestone	Status
6.4.2.1 Work directly with the Executive Director of Alumni Relations to define and institute a strategy of integration and collaboration between Alumni Relations and Development in order to leverage alumni relationships to their maximum potential (engagement and philanthropy).	Strategy and next steps articulated and documented.	 On Track


6.4.3 Define and establish a Leadership Giving Segment and develop associated programs to maximize fundraising. Listed in 7.1.6 as well.

Action/Strategy	Measurable/Milestone	Status
6.4.3.1 Hire a SDO Leadership Giving that will be responsible for strategy and execution on this donor segment.	SDO hired. Leadership Giving strategy articulated and documented.	 On Track

6.4.4 Define and establish Annual Giving at York University. Develop associated programs to maximize fundraising. Listed in 7.1.6 as well.

Action/Strategy	Measurable/Milestone	Status
6.4.4.1 Collaborate with Associate Director Annual Giving to establish best practices, determine needed resources and execute on strategy to maximize fundraising in this segment.	Annual Giving strategy articulated and documented. *Improved Annual Giving financial results (numbers to be determined)	 On Track


6.5.1 Enhance donor experience to increase satisfaction, expand the possibility of repeat giving and improve York University's reputation.

Action/Strategy	Measurable/Milestone	Status
6.5.1.1 Work directly with Executive Director of Stewardship and Stewardship team to develop processes that supports a culture of philanthropy, articulates appropriate stewardship according to gift amount and look for opportunities to automate at the AF and Leadership Giving Levels	All gift levels properly stewarded. Leadership and Annual Fund stewardship programs articulated, documented and implemented.	 On Track


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7.1.1 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
7.1.1.1 Develop a Strategic (Development) Plan that identifies issues, gaps and barriers to obtaining and sustaining long term fundraising goals. Articulate next steps and measure progress.		 On Track

7.1.2 Data - System and Process Improvement--infrastructure to maximize fundraising Ensure Advancement database and related processes reflect the needs of Development and the function of fundraising

Action/Strategy	Measurable/Milestone	Status
7.1.2.1 Work toward an error free database both from an "entity" record perspective and a financial reporting perspective.-- Data integrity is fundamental to the success of Development as it supports all of the communication efforts, analytic processes and primary relationships with our donors. *Comply with the fiduciary reporting obligation to our donors by providing reporting in an accurate and timely manner. Strive for error free data to support a positive donor experience in order to increase the likelihood of giving, repeat giving and referral giving. a positive donor experience and increases the likelihood of giving, repeat giving and referral giving.	*Quality and usability of data improved -- proven by less returned mail, better alumni engagement, positive validation of data etc. *Improved data processes seen through quicker turnaround and data quality and accuracy. *Consultant brought in and recommendations executed.	 Progressing

**Enabling the Plan
7. Enabling the Plan**


7.1.3 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

Action/Strategy	Measurable/Milestone	Status
7.1.3.1 Implement Blackbaud Target Analytics in order to understand our donor composition including geographical placement, wealth, and other donor segmentation.	*Have data analysed by Blackbaud. *Reports created and accessible. *Training delivered.	 On Track


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7.1.4. Vastly 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, forecasti

Action/Strategy	Measurable/Milestone	Status
7.1.4.1 Work with Operations and Development teams to articulate best practices for requesting reports. This involves developing a current and thorough listing of what reports are currently available and purging those that are not useful. This work is to pair with "eReport Replacement Project " facilitated by UIT and Operations 2019/2020. (Currently "75 of the 183 eReports belong to Advancement", UIT is also looking for reporting necessity verification)	A suite of usable, manipulatable 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.

Action/Strategy	Measurable/Milestone	Status
7.1.5.1 Review current Research practices as they pertain to; research requests , alignment with SDO (faculty) needs, SDO (faculty) timelines and industry best practices. Dramatically reduce research wait times, better align research outputs, reduce unnecessary time spent by Researchers and SDOs on current unaligned output. Increase time spent on prospect indentification, data mining and project specific prospecting.	Effective and focused research delivered on a mutually agreed upon timeline.	 On Track

7.1.6 Define and establish a Leadership Giving Segment and develop associated programs to maximize fundraising.

Action/Strategy	Measurable/Milestone	Status
7.1.6.1 Hire a SDO Leadership Giving that will be responsible for strategy and execution on this donor segment.	SDO hired. Leadership Giving strategy articulated and documented.	 On Track


7.1.7 Define and establish Annual Giving at York University. Develop associated programs to maximize fundraising.

Action/Strategy	Measurable/Milestone	Status
7.1.7.1. Collaborate with Associate Director Annual Giving to establish best practices, determine needed resources and execute on strategy to maximize fundraising in this segment.	Annual Giving strategy articulated and documented. *Improved Annual Giving financial results (numbers to be determined)	 On Track


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7.1.8 Maximize utilization of Planned Giving tools, engagement of SDOs and channel use strategies to maximize bequests to York University.

Action/Strategy	Measurable/Milestone	Status
7.1.8.1 Collaborate with SDO Planned Giving to establish best practices, determine needed resources and execute on strategy to maximize legacy giving..	Planned Giving strategy articulated and documented, *Increased number of legacy gifts (bequests)	 On Track


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7.2.1.1 Understand and document all faculty funding priorities as formulated by the Deans in the individual faculties. Create strategies for acquiring the necessary funding in collaboration with the SDOs. Mobilize SDOs in order to maximize their fundraising capabilities for these key priorities.	*Clearly documented funding strategies for all faculties. *Documented SDO strategies that articulate plan for meeting faculty goals for funding	 On Track

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.

Action/Strategy	Measurable/Milestone	Status
7.4.1.1 Work with the Gift Processing team to articulate an improved process for Pledge Payments, credit card re-activations and declined payments. Put current stats here i.e. current pledge fulfillment rate, average write-offs	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.

Action/Strategy	Measurable/Milestone	Status
7.4.2.1 Understand how and why funds go into "holding" and minimize the use of this process. *Ensure all funds are spent in a timely fashion and any outstanding funds in holding are reviewed on a montly basis to ensure action. *Through process improvement, maximize the timely usage of donor funds, increase the impact to donor reporting and thereby increase donor satisfaction.	Reduced the number of gifts that go into holding. A clear process established.	 On Track


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7.4.3 Eliminate the occurrence of funds left unspent, unknown and unreported. Commit to York's fiduciary responsibility to faculty and donors.

Action/Strategy	Measurable/Milestone	Status
7.4.3.1 Work with SDO's, Manager of Annual Giving, Stewardship and Finance to understand the process gaps that lead to unused funds and engineer a process that dramatically reduces funding left unspent (unutilized) and therefore unreported (unstewarded.)	Reduced number of gifts that go unspent A clear process established.	 On Track


7.4.4 Determine who creates "allocation" accounts (500, 600) and ensure the process is communicated to the Development team. Ensure all donor funds are designated correctly.

Action/Strategy	Measurable/Milestone	Status
7.4.4.1 Work with SDO's, Manager of Annual Giving, and Finance to articulate the gaps in the creation of fund allocations (account) and together engineer a gap resistant process, reducing the administrative burden on SDO's, the Manager of Annual Giving and Finance, all of whom utilize critical time on solving these administrative issues.	Easy creation of allocation accounts.	 On Track

7.4.5 Working with finance and the reporting team, ensure the ability to report accurately and confidently on cumulative lifetime giving and all other giving milestones.

Action/Strategy	Measurable/Milestone	Status
7.4.5.1 Work with Finance and Data to articulate the gaps in accurate financial reporting and together engineer a gap resistant process, reducing the administrative burden and time consuming verification of data the on Stewardship, Development and Finance teams.	Accurate financial reporting as validated consistency across multiple reporting platforms	 On Track


7.4.6 Support financial sustainability and viability of the Development department through excellent budget management.

Action/Strategy	Measurable/Milestone	Status
7.4.6.1 Manage all financial resources in accordance with York University financial policies and the budget direction from the VP Advancement. Invest in strategically defined areas such as Annual Fund, Leadership Giving, engagement travel for SDO's etc.	Balanced budget and all financial policies followed.	 Completed


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7.5.1 Attract and retain the necessary people talent required to successfully meet and exceed Development goals and aspirations.

Action/Strategy	Measurable/Milestone	Status
7.5.1.1 Building on the Employee Satisfaction Survey Feedback, continue to build and sustain a results driven, York connected (proud), collaborative, talented, and dedicated team. Clearly define job roles and responsibilities, empower team to act within their parameters, and foster a culture that is supportive, team focused and success oriented.	*All Jobs roles clearly defined and documented. *All PMPs completed on time. *Retention ladder completed and implemented. *Regular 1:1 scheduled and occurring.	 Completed


7.6.1 Attract and retain the necessary people talent required to successfully meet and exceed Development goals and aspirations.

Action/Strategy	Measurable/Milestone	Status
7.6.1.1 Building on the Employee Satisfaction Survey Feedback, continue to build and sustain a results driven, York connected (proud), collaborative, talented, and dedicated team. Clearly define job roles and responsibilities, empower team to act within their parameters, and foster a culture that is supportive, team focused and success oriented.	*Training and leadership opportunities provided. *Retention ladder completed and implemented. *Regular 1:1 scheduled and occurring.	 Completed

7.7.1 Attract and retain the necessary people talent required to successfully meet and exceed Development goals and aspirations.

Action/Strategy	Measurable/Milestone	Status
7.7.1.1 Foster a collaborative team environment through the removal of an internally competitive culture. Encourage SDO cross faculty collaboration, ideas sharing and joint calling activity.	Collaborative well communicating and supportive team environment.	 Completed

7.8.1 Attract and retain the necessary people talent required to successfully meet and exceed Development goals and aspirations.

Action/Strategy	Measurable/Milestone	Status
7.8.1.1 In response to the Employee Satisfaction Survey and good management practices, continue current team recognition program and encourage feedback and suggestions on program improvement.	Formalized team recognition program developed, as well as ongoing spontaneous recognition provided	 Completed

