



Academic Quality

1. Innovative, Quality Programs for Academic Excellence


Action/Strategy	Measurable/Milestone	Status
		 Not Evaluated

Academic Quality

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


Action/Strategy	Measurable/Milestone	Status
		 Not Evaluated

Student Success

Action/Strategy	Measurable/Milestone	Status
		 Not Evaluated


Student Success

4. A Student-Centred Approach

Action/Strategy	Measurable/Milestone	Status
		 Not Evaluated

Engagement and Outreach







5. Enhanced Campus Experience

Action/Strategy	Measurable/Milestone	Status
		 Not Evaluated



Engagement and Outreach

6. Enhanced Community Engagement

Amplify Development: Drive strategy and activity related to top-tier development opportunities; Provide high quality customized and general donor-focused communication materials and collateral to amplify our development activity.




Action/Strategy	Measurable/Milestone	Status
Collaborate with development colleagues to uncover principal gift prospects within our prospect pipeline; drive and/or collaborate on strategy in support of York's priorities including: academic excellence; experiential education, innovation and entrepreneurship; student financial support.	Increased number of top-tier prospects who are being actively cultivated.	 On Track
Manage portfolio of donors and prospective donors to secure philanthropic donations in support of York's priorities.	Relationships are established and advanced.	 On Track
Produce custom and general donor-focused communication materials, including an annual Donor Impact Report, customized stewardship reports and proposals, and strategic materials.	Donor Impact Report is developed and distributed annually; custom stewardship reports and proposals are developed on demand.	 Progressing
Develop proposal overviews for the University's top fundraising opportunities, pan-University and faculty/unit specific.	Top priorities are determined; proposal overviews are developed; emergent priorities are recognized and addressed.	 Progressing
Develop concept and framework for volunteer and prospect engagement, to foster closer relationships with volunteers and build on trends in philanthropy.	Concept is developed; next steps are determined.	 Progressing
Devise a donor reporting matrix, consistent with the donor recognition framework, to inform resource allocation.	Matrix is developed and implemented.	 Progressing

Celebrate philanthropy: Lead Donor Recognition activity with gift announcements, communications, recognition societies, physical recognition programs, and customized, donor-focused activities.






Action/Strategy	Measurable/Milestone	Status
Lead gift announcements and donor-focused celebrations of giving, to ensure donors have an extraordinary experience and capture stories to promote philanthropy at York.	Gift announcements are meaningful, and awareness of philanthropy at York is increased.	 On Track
Conceptualize signature event for celebration of donors on a regular basis.	Concept developed and project plan drafted.	 Progressing

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Build and launch a comprehensive Donor Recognition Society (the White Rose Society), as a platform to thank and recognize donors and facilitate elevated donor giving.	Tiered membership of society is developed; features of recognition within tiers is developed; project plan for launch is drafted.	 Progressing
Contribute philanthropy lens to Divisional approach to National Awareness Days to thank and recognize volunteers and donors.	Divisional strategy to thank and recognize volunteers and donors is inclusive of philanthropy.	 On Track
Develop strategy to celebrate meaningful donor and donor family milestones.	Strategy is developed.	 Progressing

Foster a culture of philanthropy through activity and communications that celebrate the impact donors have at York. Create and nurture traditions to strengthen bonds between donors and York.

Action/Strategy	Measurable/Milestone	Status
Champion a donor-centric culture by embodying ethical stewardship to inform best practices; leverage opportunities to facilitate meaningful conversations about philanthropy.	Activities and decisions that involve donor support are made in consideration of donor stewardship.	 Progressing
Lead the discussion about a renewed Physical Recognition Plan, inclusive of virtual recognition.	Discussion begins; strategy is drafted.	 Progressing
Promote an integrated culture of philanthropy with University colleagues and stakeholders, to meet donor stewardship requirements.	Relationships with stakeholders including Treasury, Legal Counsel, VP Students, Facilities, President's Office, Senior Administration/UEC, and others, are developed and nurtured.	 On Track
Promote donor-focused content for distribution across various University channels.	Donor-focused communication pieces are developed or repurposed to distribute to the York community.	 Progressing
Build a sense of tradition and community at the University with a robust Donor Relations program.	Program is introduced to build intention and measure into our annual and periodic donor activities.	 Progressing





Enabling the Plan
7. Enabling the Plan

Embed donor relationships and stewardship obligations into the fabric of the University with policy and process development; drive donor relations and stewardship activity programmatically to nurture continued giving.





Action/Strategy	Measurable/Milestone	Status
Lead development and implementation of a refined gift agreement framework.	Revised suite of templates are developed in consultation with Legal Counsel; new templates are introduced through existing process.	 Progressing

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Activate "Integrated Stewardship" portfolio with select donors.	Stewardship Manager assignment is applied to select donors; proactive stewardship is initiated.	 Progressing
Develop Donor Recognition Framework to guide the Division on protocol and resource-allocation related to giving levels.	Donor Recognition Framework is drafted; consultation is undertaken.	 Progressing
Continue to lead the execution of the Endowment Fund Reporting project to donors, with continued improvements.	Endowment fund reports are complete before August 31, 2019; consult on the automation of components on this project being undertaken by UIT; tack on reporting for donor-funded expendable awards.	 On Track
Ensure that donor funds are utilized as intended by introducing a process to ensure administrative uptake by involved units, and by leading actions informed by a 'no spending review'.	'Fund checklist' is developed and implemented; 'no spending review' is undertaken and steps to remedy are actioned	 Progressing

Promote Divisional and Institutional integration through strategic planning and collaboration to maximize our collective efficiency and efficacy.

Action/Strategy	Measurable/Milestone	Status
Mobilize PGDRS team members through clarity of roles and objectives.	Departmental goals are articulated; job descriptions and reviewed and refined as necessary to reflect objectives.	 On Track
Review and drive adjustments to Divisional business rules and standard operating procedures that bear on the work of Principal Giving, Donor Relations & Stewardship; catalyse conversations to improve systems, data and processes.	Feedback is provided on business rules and SOPs that bear on the Department's work.	 Progressing
Develop re-engagement plan for lapsed donors, and collaborate with Development Team colleagues to reignite giving relationships.	Lapsed donors are identified; conversations with applicable colleagues are initiated to develop re-engagement plans.	 Progressing
Leverage opportunities through Advancement activity to promote University priorities.	Initiative to promote experiential education, including the identification of internship opportunities for students and financial support, is introduced.	 Completed
Collaborate with Divisional colleagues on a comprehensive communications plan.	Participate in plan development.	 On Track

