

Academic Quality

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



2.3 Support research services transformation to support PIER

Strategy/Action	Measure/Milestone		
2.3.1.a Identify synergies between VPRI Research Services and Advancement Services and Operations	Efficiencies identified		On Track

Student Success

4. A Student-Centred Approach

4.2.1 Support Strategic Enrolment



Strategy/Action	Measure/Milestone		
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 CRM project	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







Strategy/Action	Measure/Milestone
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<p>6.1.3.a Support the implementation of Target Analytics prospect scoring</p>	<p>Self serve reporting of prospect scores and campaign reports. Improved data quality</p>	<p> Completed</p>
<p>6.1.3.b Improve campaign reporting by developing new Development and Alumni dashboards in E-reports and BI.</p>	<p>Self serve reports for campaign Ability to measure KPIs</p>	<p> Progressing</p>
<p>6.1.3.c Build a data governance and management team to improve the collection and quality of data as an asset to support strategic decision making.</p>	<p>Team created Data Governance Strategies Defined</p>	<p> Progressing</p>
<p>6.1.3.d Improve quality and accessibility of donor recognition and cumulative to support Donor Relations and Development</p>	<p>Rules defined Process created Data cleaned Reports built</p>	<p> On Track</p>
<p>6.1.4.a Ensure new brand and marketing are maximized at convocation</p>	<p>Review marketing and branding at convocation. Request in year strategic funding. Implement new branding at convocation. Address issues raised from review</p>	<p> On Track</p>










Enabling the Plan  
7. Enabling the Plan

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

Strategy/Action	Measure/Milestone	
<p>7.1.1.a Create Pilot international graduation ceremony to support York International engagement activities to support the internationalization strategy</p>	<p>International engagement participation is 100+ Positive feedback from participants</p>	<p> Discontinued</p>
<p>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.</p>	<p>Have data analysed by Blackbaud. Reports created and accessible. Training delivered. Unknown prospects identified</p>	<p> Completed</p>

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

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
7.6.1 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
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.		Progressing
7.7.1.b Instill leadership competencies in recruitment, performance management and professional development in directors and managers	Improvement in Staff Engagement score		Progressing
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		Progressing
7.7.1.e Ensure individual goals are aligned with IRP and support the academic plan	Approved by SLT		Completed
7.8.1.a Identify staff engagement drivers to celebrate and action.	Staff Engagement score improves		Progressing
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		On Track
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		Progressing
7.8.1.e Build a healthy workplace environment that support mental well being, promoting physical activity and inclusion.	Improvement in Staff Engagement score		Progressing
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
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		Completed
7.10.1.b Implement endowment automation	Endowments reports are produced before September Error reduced Effort reduced		Completed
7.10.1.c Provide gift processing services in the uk for UK resident donors	Uk Donations processed Gift aid collected Charity administered		Completed
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.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.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