









## 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.**

Strategy/Action	Measure/Milestone		
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.		Progressing
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.		On Track
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.		Not On Track
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.		Not On Track
Devise a donor reporting matrix, consistent with the donor recognition framework, to inform resource allocation.	Matrix is developed and implemented.		Not On Track
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.		Not On Track

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.		Not On Track
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.		Progressing
Develop strategy to celebrate meaningful donor and donor family milestones.	Strategy is developed.		Not On Track
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.		On Track
Lead the discussion about a renewed Physical Recognition Plan, inclusive of virtual recognition.	Discussion begins; strategy is drafted.		Not On Track
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.		Progressing
Promote donor-focused content for distribution across various University channels.	Donor-focused communication pieces are developed or repurposed to distribute to the York community.		On Track
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.		Not On Track


Enabling the Plan  
7. Enabling the Plan

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

**Strategy/Action**

**Measure/Milestone**

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.		Progressing
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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.		Not On Track
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.		On Track
Collaborate with Divisional colleagues on a comprehensive communications plan.	Participate in plan development.		On Track
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.		On Track
Activate "Integrated Stewardship" portfolio with select donors.	Stewardship Manager assignment is applied to select donors; proactive stewardship is initiated.		On Track
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.		Not On Track
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		Not On Track