

DIVISION: Division of VP Advancement

UNIT: Division of VP Advancement

PLAN ID: 1312

1. 21st Century Learning

1.1 Support Experiential Education and Work Integrated Learning

Action/Strategy:

1.1.1 Integrate EE/WIL into alumni and fundraising activity, locally and globally. Engaging with campus colleagues and Deans to further develop this priority

Measures/Metrics/Milestones:

1.1.1.1 Increased support and engagement for EE/WIL
Increased number of alumni referred as EE hosts

Evaluation Status:

 Progressing

2. Knowledge for the Future

2.1 Raise funds for research activity, research chairs, professorships, postdoctoral fellows, and other faculty supports, to enable York's focus on academic excellence, in addition to raising funds for Entrepreneurship/Innovation

Action/Strategy:

2.1.1 Work with VPRI, Provost and Deans to define research priorities, refine Chair processes and funding requirements. Staff actively collaborating with researchers to raise funds for research projects
2.1.2 Continue to develop strong partnership to raise funds with Innovation York

Measures/Metrics/Milestones:

2.1.1.1 Increase in number of donor funded Chairs, faculty positions, and related research endeavours
2.1.2.1 ??

Evaluation Status:

 Progressing

3. From Access to Success

3.1 Raise funds for undergraduate and experiential education, innovation, and entrepreneurship activities for students

Action/Strategy:

3.1.1 Improve support to allow students access to experiential learning opportunities
3.1.2 Confirm institutional and Faculty priorities for students funding

Measures/Metrics/Milestones:

3.1.1.1 Increase in number and type of awards available for students based on priorities
3.1.2.1 Increased funding available to students

Evaluation Status:

 On Track

4. Advancing Global Engagement

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4.1 Increase and Strengthen Alumni Engagement Globally and Locally

Action/Strategy:

Measures/Metrics/Milestones:

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4.1.1 Support Internationalization Strategy through alumni engagement activity
-Continue to grow alumni networks in priority cities

4.1.2 Create reputation-enhancing events and communications

4.1.3 Engage alumni to support:

- Student recruitment
- Experiential education
- Volunteerism
- Philanthropy

4.1.4 Create digital and remote opportunities for alumni to engage with students and each other

4.1.5 Identify targeted alumni segments and develop engagement activities

- Engagement with Faculty, College or academic unit
- Young alumni
- Network and programs for equity-seeking communities

4.1.6 Mobilize Alumni to Enhance the Student Experience via:

- Mentorship
- Career panels
- Student recruitment & retention
- Experiential education
- Involvement in student club activities

4.1.7 Leverage existing and emerging programs and events to cultivate and steward donors and prospects

4.1.8 Develop events and programs that support both alumni engagement and development goals, such as interest coding, and allow for free flow of referrals

4.1.9 Focus on Annual & Leadership Giving:

- Focus on stewardship to rebuild relationships
- Use of hybrid model AG approach
- Identify receptive segments (data critical/experimentation)

Focus on reporting and systems to better service donors

- Continue consultant assisted collateral development
- Develop Digital Channel
- Progress Calling Program
- Progress Leadership Giving Program

4.1.10 Increase External Engagement

4.1.11 Develop regional strategy with support of Blackbaud data (US)

4.1.12 Seek cultivation opportunities individual (and corporate)

- Speakers

4.1.1.1 Hold 1 event each for London and NYC audiences (open to all)

4.1.1.2 Increase number of Alumni engaged with international networks

4.1.1.3 Increase levels of international giving

4.1.2.1 Increase event attendance and gather guest feedback.

4.1.2.2 Increase number of returning attendees and readers to increase the loyal base.

4.1.3.1 Increase number of alumni donating

4.1.5.1 Production of two newsletters for each of 4 regions annually

4.1.5.2 Increase in net new young alumni engaged
Increased number of young alumni volunteers
Improvement of net promoter score over time

4.1.6.1 Increased number of alumni mentors

4.1.6.2 Number of alumni engaged in recruitment

4.1.7.1 Increase donor attendance and participation at student focused activities and events e.g. convocation

4.1.8.1 Increase giving connected to alumni events, activities and magazine.

4.1.9.1 Increased alumni giving across strategic segments

Increased results from digital and non-traditional channels

4.1.10.1 Increase in engagement across strategic segments

4.1.10.2 Increased number of regional meetings

4.1.11.1 Produce regional support strategy

4.1.12.1 Increase opportunities and uptake of support options and actions.



On Track

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- Recruiters
- Experiential education/WIL
- Student Engagement (mentoring, visiting experts etc)

4.2 Refresh and Expand Impact: The Campaign for York University

Action/Strategy:

- 4.2.1 Evaluate Current State and Define Expanded Campaign
- Define goals and KPIs
- Inventory transformational projects (short/lg term)
Build Cases for support for all faculties/strategies defined
- Inventory Pan University/faculty funding priorities - centres, ORUs, areas of interest
 - Identify prospects/ build Campaign Chart
 - Develop reporting
 - Engage brand and marketing -- brand extended campaign
 - Strategically engage stakeholders and communities for long term success
 - Define Resource requirements (budget, people, reporting, research, coms etc.)
 - Maximize mobilization of Development team
 - Define volunteer engagement -- BoG, Campaign Cabinet, etc
 - Build the pipeline
 - Stewardship processes defined
 - CRM and infrastructure (improvement of systems and procedures)
 - Regional strategy/BB plus US constituents
 - Leverage AE activities, programs and connections
 - Develop community fundraising programs (Black, Indigenous, and other EDI ops)
- 4.2.2 Realize transformational fundraising opportunities:
- Identify prospective principal-level donors within pipeline develop strategy and action plan
 - Develop donor-focused Cases for Support of the University's highest priorities and direction, as part of Campaign refresh
- 4.2.3 Enable major gift fundraising with donor-focused materials:
- Develop proposals for prospective major gift donors
 - Develop stewardship reports for major gift donors

Measures/Metrics/Milestones:

- 4.2.1.1 Full strategy completed
- 4.2.1.2 All consultations completed and stakeholders engaged
- 4.2.1.3 Campaign Cabinet recruited
- 4.2.1.4 New Campaign goal and timeline announced
- 4.2.1.5 Campaign branded under new protocol
- 4.2.2.1 Priorities identified, ranked and scheduled
- 4.2.2.2 Cases developed as per schedule
- 4.2.3.1 Proposals developed on demand
- 4.2.3.2 Stewardship reports developed on demand, and annual reports developed for stewardship portfolio

Evaluation Status:

 On Track

4.3 Markham Centre Engagement and Fundraising

Action/Strategy:

Measures/Metrics/Milestones:

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4.3.1 Define and Activate MCC Campaign

- Embed MCC within overarching Campaign
- Hire and onboard new staff
- Recruit volunteer cabinet
- Inventory naming opportunities
- Understand curriculum/program offerings at campus
- Understand unique value proposition: tech /innovation /entrepreneurship
- Understand strategic goals programming, partnerships, research and student deliverables.
- Build Case(s) for support
- Identify prospects
- Build pipeline
- Define Resource requirements (budget, people, reporting, research, coms etc.)
- Define reporting needs
- Leverage/support AE activities, programs and connections community based
- Understand future needs of MCC (unique or embedded with Keele)
- Develop community segmented fundraising programs (special interest groups, corporations, sectors etc)

4.3.1.1 Strategy Developed

4.3.1.2 Budget created
Staff hired

4.3.1.3 Volunteers recruited

4.3.1.4 Campaign materials produced

4.3.1.5 Campaign strategy defined

4.3.1.6 Community mobilized

4.3.1.7 New funds raised for Capital and supporting activities

On Track

5. Working in Partnership

5.1 Engagement strategy for external communities

Action/Strategy:

5.1.1 Work with colleagues across the University to define processes and coordination to ensure maximum impact with external partners of all kinds

Measures/Metrics/Milestones:

5.1.1.1 Development of external relations framework and common goals for engagement of partners

5.1.1.2 Use of new CRM to track and coordinate activity, once implemented

Evaluation Status:

On Track

6. Living Well Together

6.1 Raise funds to build stronger communities through capital projects that support our campus learning environment

Action/Strategy:

6.1.1 Capital project fundraising priorities include Markham, McEwen, Bergeron, Sherman, Second Science/Engineering Building, Continuing Studies, Library, Goldfarb Gallery, Stadium and others as developed and approved

Measures/Metrics/Milestones:

6.1.1.1 Increased funding for capital projects

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6.2 Build Capacity and transform Services to deliver Service Excellence

Action/Strategy:

Measures/Metrics/Milestones:

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- 6.2.1 Expand international giving capabilities
- 6.2.2 Introduce Anthology Email
- 6.2.3 Provide system to continue to expand event support for to the faculties
- 6.2.4 Increase engagement and fundraising opportunities for convocation
- 6.2.5 Continue to streamline the budget & payroll process to decrease effort, errors, and improve reconciliation.
- 6.2.6 Data loads automated to streamline
- 6.2.7 Improve services from the perspective of the consumer
- 6.2.8 Deliver ADV CRM Migration
- 6.2.9 Facilitate gift acceptance and compliance:
Facilitate gift acceptance with the Gift Agreement process for donations, from providing counsel, drafting agreements, securing University approvals, and execution, in accordance with University policies and the Signing Authority Registry
- 6.2.10 Anticipate and respond to emerging social movements pertaining to donors through the Gift Agreement process, initiating Special Programs where necessary
- 6.2.11 Review practices that require the use of a Gift Agreement for donations under major gift thresholds, and offer potential remedies to adjust associated fundraising practices
- 6.2.12 Introduce tactics to improve compliance in the use of donations, to better enable donor stewardship
- 6.2.13 Lead and support the stewardship of major and principal gift donors
- 6.2.14 Develop donor stewardship framework to provide guidance to stewardship approach based on donor giving level
- 6.2.15 Consult on stewardship plans with development colleagues
- 6.2.16 Develop approaches to celebrate donors in the COVID environment: Lead gift announcements and donor-focused celebrations of giving
- 6.2.17 Develop and drive stewardship plans for top-tier donors

- 6.2.1.1 Giving vehicles in UK, Hong Kong, Singapore set up
- 6.2.1.2 Documenting new process and SOP for CRM Fit Gap
- 6.2.1.3 International giving to ensure it is streamlined and efficient.
- 6.2.1.4 Produce brief information sheet for Development
- 6.2.2.1 Reduce cost of email to enable increased distribution
- 6.2.3.1 Introduce university wide events management system Anthology
- 6.2.3.2 Increase the number of faculty events supported
- 6.2.3.3 More events run by UEC and faculties using our systems
- 6.2.4.1 Implement class gifts and parent gifts for convocation
- 6.2.4.2 Create a portfolio of convocation engagement opportunities
- 6.2.4.3 Outsource guest services and staffing to convocation venue
- 6.2.5.1 Reduce time to complete advancement unit operational plans
- 6.2.5.2 Improve quality of cost centre manager budgeting to reduce variance to budget
- 6.2.5.3 Complete review and identify longer term changes
- 6.2.6.1 Scrubbing environment created
- 6.2.6.2 Web services data exchange automation
- 6.2.6.3 Identify data acquisition opportunities
- 6.2.7.1 Define the end to end processes and lifecycles of services
- 6.2.7.2 Introduce request tracking system to monitor turnaround and satisfaction
- 6.2.7.3 Expand availability of research profiles
- 6.2.7.4 Improve and reduce handoffs between team to improve quality
- 6.2.7.5 Introduction of Service Quality Management process to reduce errors in work
- 6.2.7.6 Introduce problem management to identify root cause for high impact and recurring problems
- 6.2.7.7 Improve pledge reminder process
- 6.2.7.8 Reduce number of late pledge payments
- 6.2.7.9 Increase customer satisfaction
- 6.2.7.10 Reduce hand offs to other teams implement one stop shop
- 6.2.7.11 Document all processes
- 6.2.7.12 Interest coding delivered
- 6.2.7.13 Prospect ratings improved
- 6.2.8.1 Implement data definition and data governance
- 6.2.8.2 ADV Data Dictionary created
- 6.2.8.3 Data quality improved prior to migration
- 6.2.8.4 Data clean ups identified and cleaned
- 6.2.8.5 CRM Fit GAP completed
- 6.2.8.6 CRM Team hired

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- 6.2.8.7 Processes documented and implemented
- 6.2.8.8 Data migrated
- 6.2.8.9 Testing completed
- 6.2.8.10 System documented
- 6.2.8.11 Training designed and delivered
- 6.2.8.12 Successful go live

- 6.2.9.1 GP review Endowment reconciliation, Pledge reminders, Credit Cards, Holding cost centre and Research process
- 6.2.9.2 Gift agreements developed on demand

- 6.2.10.1 Special programs developed as required
- 6.2.10.2 Recommendations advanced to SLT

- 6.2.11.1 Strategy developed and implemented
- 6.2.11.2 Framework developed
- 6.2.11.3 Consultations provided on demand

- 6.2.12.1 Gift announcements are appropriate situationally, while providing meaningful donor gratitude and engagement
- 6.2.12.2 Stewardship plans are developed and implemented for assigned stewardship portfolio
- 6.2.12.4 # of reports; date delivered

6.3 Support Positive Work Environment and Team Culture

Action/Strategy:

Measures/Metrics/Milestones:

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6.3.1 Team meetings & one-on-one's

6.3.2 Performance Dialogue & Goal Setting workshops built around motivational goal setting

6.3.3 Create career development plans and knowledge transition plans - Support learning and development

6.3.4 Staff Development to build a more collaborative and communicative team

6.3.5 Empower employees to make decisions and lead change

6.3.6 Support resilience to enable ability to cope with change

6.3.7 Support a culture of exploration and change
Identify way to "be the brand"

6.3.8 Introduce try, test, "not quite yet" thinking rather than failure

6.3.9 Encourage collegiality, collaboration, and respectful dialogue

6.3.10 Support constructive feedback, collaboration, and collegiality

6.3.11 Provide role clarity

6.3.12 Attract and retain talent

6.3.1.1 All employees have regular team meeting and one to ones with documentation

6.3.2.1 All employees have annual goals documented

6.3.3.1 All employees development plans documented

6.3.4.1 All employees complete in teamwork and communication training

6.3.4.2 Improvement in employee satisfaction survey

6.3.5.1 Team members are empowered in goals to make decision, supported and accountable

6.3.5.2 Team members are encouraged to align goals with improvement initiatives

6.3.6.1 Training is encouraged to provide tools to understand and cope with change.

6.3.7.1 Identify behaviours required to be the brand

6.3.8.1 Encourage entrepreneurial goals using test cases and pilots

6.3.9.1 Ensure divisive behaviours are challenged and good teamwork rewarded

6.3.10.1 Provide training to guide staff how to solicit and provide constructive feedback

6.3.11.1 Provide role clarity referencing and updating job descriptions and competencies within the employee one to one meetings

 Progressing