University Advancement
2017-2020 Strategic Plan
Fiscal Year 2018-19 Addendum

UCR 2020 specifically addresses advancement priorities for the decade:

- Build a sustainable culture of philanthropy;

- Heighten UCR's national profile; and

- Plan and execute a comprehensive fundraising campaign.

University Advancement Mission, Vision, and Values

University Advancement's mission is to inspire pride, commitment, and investment in UCR. Our vision is to be the standard for quality service, integrity, and accountability.

Strategic Goals

Summary Strategy 1 *– focus on long-term relationship building that emphasizes major gifts, a donor-centric orientation, and exceptional stewardship.*

1. Successfully close *Living The Promise: The Campaign for UC Riverside* with at least $300 million of private support by December 31, 2020

   a. Improve forecasting of fundraising progress

      i. Finalize a fundraising dashboard that will be delivered to the Chancellor and Provost monthly during FY2018-19

      ii. Quarterly forecasts and refinement based on data in RE

   b. Achieve 75% of goal amount ($225 million) by December 31, 2018

   c. Surpass $37 million during fiscal year 2018-19 ($3 million+/month)

      i. Increase average annual private support to >$40 million by the end of the campaign

   d. Increase reach and impact of *Living The Promise* events in FY2018-19 through critical analysis of structure, content, locations, timing, and marketing

      i. Assess role/value of faculty presentations and brainstorm new presenters between Alumni Engagement, Development and Univeristy Communications

ii. Consider value of integrating students into program (e.g. scholarship recipient, undergraduate researcher, Grad Slam participant, etc.)

iii. Propose broader range of delivery mechanism beyond the single format, broad-invite, that demands the same staff leads for all events

1. Leverage chapters and other regional opportunities to provide campaign update and deliver points of pride (e.g. Del Mar Races, Hollywood Bowl, Dodgers game, etc.)

e. Revisit the UCRAA Scholarship Endowment goal of $1.5 million since that amount will be reached by December 2018

i. Engage Alumni Board at retreat in September 2018 to discuss new goal

Summary Strategy 2 *– broaden storytelling to create awareness, consideration, and referral/advocacy; through improved targeting increase reach and engagement; devote more capacity to developing shared brand assets for the whole campus*

2. Redirect marketing and communications strategy to one that is audience-centered, aligned to industry best practices, and advances the university's highest strategic priorities.

a. Complete brand messaging initiative in 2018

i. Complete market research on key audiences

ii. Create brand messaging assets that can be used across campus

iii. Develop and deploy messaging rollout strategy

b. Overhaul UCR's owned mass communications channels, increase overall audience reach, and reduce volume of content production.

i. Eliminate redundant or ineffective channels

ii. Redesign primary online channels

iii. Develop and deploy new external-facing email publication

iv. Create new news and information website for employees

c. Expand awareness of UCR through increased reach and engagement in earned and social media

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      i.   Increase engagement across UCR's primary social media channels by 40 percent

     ii.   Increase media coverage in targeted state, regional, and national media outlets

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   d. Diversify storytelling to reflect the entire UCR experience

      i.   Integrate student life and Athletics into daily storytelling for earned, owned, and shared media channels

     ii.   Create experiential marketing assets for use in UCR events

    iii.   Reduce volume of events-related news stories and expand use of centralized online calendar

    iv.   Expand use of social video, livestreaming, animations, and other innovative storytelling methods

Summary Strategy 3 – *invest in sustained annual giving pipeline development, enhance the perceived value of staying connected and giving back among young alumni in particular, and ensure the future of UCR through legacy giving.*

3. Articulate the specific attributes of a culture of philanthropy and set metrics and targets that will allow UCR to credibly claim that it has one by the end of the campaign, in preparation for Campaign II

   a. Improve performance of annual giving program

      i.   Advancement leadership to promote campus-wide ownership of annual giving goals and objectives

     ii.   Create strategic plan and targets for 2018-19 around acquisition, retention, upgrades, # of Chancellor's Associates, average gift size

    iii.   Track donor loyalty in years and consider longevity recognition

    iv.   Launch faculty/staff giving campaign in 2018-19

     v.   Re-envision class giving effort to instantiate loyal donor behaviors before students leave campus

   b. Improve performance of gift planning program

      i.   Deliver a three-year strategic plan to grow planned gifts during summer 2018, with embedded metrics, goals, and description of programmatic initiatives

      ii.   Record $30 million in documented bequest intentions by December 31, 2020 (approximately $10 million already booked as of 4/30/2018)

c. Increase emphasis on engagement, especially of younger alumni, to lay the groundwork for future fundraising campaigns

      i.   Evaluate connecting *Highlander Day of Service* with *Day of Giving* in messaging to better emphasize "giving back" in all its forms and allow each event to reinforce and promote the other

      ii.   Increase Highlander Day of Service participation goals

          1. 2016-17: 395 actual

          2. 2017-18: 555 actual

          3. 2018-19: 600 goal

          4. 2019-20: 650 goal

      iii.   Develop Day of Giving (Giving Tuesday) plan

          1. Identify goals for number of gifts, average gift size, messaging and marketing, relationship and goal alignment with Donor Appreciation Week

      iv.   Deliver value to graduates by enhancing career programming and support

          1. Define qualitative and quantitative measures of success

      v.   Devise new channels for fundraising outreach to graduates of the last 15 years

          1. Track student engagement in partnership with Student Affairs

          2. Track GOLD/SAA leadership giving by cohort and analyze trends

d. Collect and provide metrics from e-mails and social media to be included in the active alumni engagement score

e. Facilitate conversations with Alumni Engagement, Career Services, RED, University Communications to provide meaningful engagement opportunities with key external constituents (alumni, corporations, foundations, donors, and campaign volunteers).

f. Through nominations and turnover, promote a highly engaged foundation board of trustees with demonstrated philanthropic commitments

Summary Strategy 4 *– prioritize long-term vision over short-term fixes; define and track metrics of effectiveness and efficiency, challenge the status quo and commit to continuous improvement; advance and support data-driven decision making, embracing analytic capabilities*

4. Develop a sustainable system of processes, metrics, and practices that will allow for continued momentum beyond the end of *The Campaign for UC Riverside*.

    a. Improve financial planning, reporting, and data for decision-making

    FY18-19 Objective:

    Implement Sources and Uses reporting as follows starting in August 2018:

    - Department reports created by Budget and Operations Managers to AVCs monthly

    - Comprehensive UA reports for VC with the following timing:

        1. Every other month starting in November through March

        2. Monthly April – July

        3. Quarterly meetings with VC, Sr Exec Dir and Dir Budget and Operations

    FY18-19 Objective:

    Create and implement a data management and integrity plan for RE data by June 30, 2019 which includes:

    - Data dictionary documentation

    - Clarity on who manages data updates and frequency thereof (example: new graduates; scholarship recipients; fund attributes)

    - Regular, transparent timelines for constituent contact updates that meet the needs of the department (example: NCOA updates are completed prior to pulling UCR Magazine list.)

    FY18-19 Objective:

    Evaluate and streamline gift processing processes to reduce manual data entry by June 30, 2019.

b. Provide transparency in fulfillment of requests for IT support, training, and equipment

FY18-19 Objective:

- Implement tracking system that creates clarity for customers on request status and reduce lead time required down 25% by March 31, 2019.

c. Create a fully developed talent management plan/program in FY2018-19 that anticipates the distinctive challenges and opportunities presented by the end of *The Campaign for UC Riverside*

    i. Source quality candidates in a reasonable amount of time to fill vacancies

    ii. Track and report metrics including days to fill, retention, turnover, staff candidate referrals, etc.

    iii. Improve on-boarding process, engagement, retention

FY18-19 Objective:

Create a comprehensive, consistent on-boarding program for all new employees by December 31, 2018 that includes:

- Coordinated, transparent tracking system for all parties involved in the on-boarding process for each new employee

- Supervisor toolkit with on-boarding best practices

FY18-19 Objective:

Define talent management metrics that will be tracked by July 31, 2018 and implement regular reporting of those metrics beginning in August 2018.

d. Successfully complete NXT transition

e. Meet or exceed performance benchmarks for the UCR Foundation endowment returns and grow the combined endowment to $300 million by December 31, 2020

December 5, 2016
Amended October 1, 2017
Amended May 1, 2018
Amended June 11, 2018