


UNIVERSITY OF CALIFORNIA
UCRIVERSIDE
University Advancement
2017-2020 Strategic Plan
Fiscal Year 2019-20 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.*

FY19-20 Objectives:

- a. Generate at least \$40 million in private support (gifts and new pledges, including reportable bequest intentions) during fiscal year 2019-20 (\$3.33 million+/-month)
 - i. At least \$5 million in bequest intentions
 - ii. At least \$20 million in principal gifts (\geq \$1MM each)
- b. Improve forecasting of fundraising progress to enable a \pm 10% margin on mid-range projection
 - i. Develop quarterly predictive analytics and refine forecasts based on proposal and solicitation data in RE
 - ii. Create better spacing of solicitations through the year so that gifts don’t pile up in Q4 of the fiscal year
- c. Achieve 87% of overall goal amount for *Living The Promise* comprehensive fundraising campaign (\$260 million) by December 31, 2019
- d. Conduct feasibility analysis for Student Success Initiative, develop campaign plan, and finalize fund inclusion criteria

- e. Diversify *Living The Promise* event activities in FY2019-20 through critical analysis of structure, content, locations, timing, and marketing
 - i. Assess size and format; emphasis on optimizing effort and increasing efficiency (smarter vs. harder)
 - ii. Develop and track specific metrics to gauge event effectiveness, including:
 - 1. Number of follow-up conversations with gift officers
 - 2. Other *active* engagement after event (speaking in a class, mentoring a student, volunteering for a committee or other activities, becoming a member)
 - 3. Number of new charitable gifts in the 90 days following attendance at an event
 - iii. Revise door prize cards to capture more useful information for RE updates
 - iv. Continue exploring ways to integrate students into California programs (e.g. scholarship recipient, undergraduate researcher, Grad Slam participant, etc.)
 - v. Evaluate broader range of delivery mechanisms beyond the single format, broad-invite, that demands the same staff leads for all events
 - 1. Smaller dinners instead of large reception
 - 2. Virtual events
 - 3. More chapter-hosted events (without university staffing)
- f. Increase the UCRAA Scholarship Endowment goal to \$1.65 million (UCRAA board discussed and approved in February 2019)

Summary Strategy 2 – Elevate brand advancement, marketing, and communications programs and build organizational capacity to effectively reach mass and targeted audiences.

FY19-20 Objectives:

- a. Fully implement brand strategy and messaging, and successfully complete update to visual identity.
 - i. Finish and roll out visual identity initiative, complete with new design elements and assets for campus partners

- ii. Update marketing and promotional messaging, and develop additional Power Claims, to align with new brand strategy
 - iii. Create a brand story bank with storytelling assets that align with brand messaging.
 - iv. Fully implement updates to campus signage programs developed and approved during the 2018-19 academic year.
- b. Enhance digital marketing effectiveness at all levels of the organization.
 - i. Support overhaul of online giving experience.
 - ii. Develop and implement strategy to improve online search performance and increase traffic to UCR websites through search.
 - iii. Upgrade and automate web analytics tools to widen adoption across the university.
- c. Deploy targeted campaigns and promotions to reach and engage critical audience segments, especially alumni, donors, prospective students, and higher education leaders.
 - i. Launch a holiday ad campaign and brand activation coinciding with the Riverside Festival of Lights, designed to reach and engage a Southern California mass market audience.
 - ii. Develop and deploy a targeted multi-channel campaign designed to either a) engage a particular region supporting non-resident enrollment and/or b) boosting the university's reputation within the higher education community.
 - iii. Lead a marketing campaign designed to reach and exceed participation goal in the alumni census.
- d. Continue to develop and maximize earned, owned, and shared media and Advancement communications.
 - i. Grow media coverage through a proactive relationship-building effort targeting select California, television, national, higher education, and science and health journalists.
 - ii. Collaborate with Alumni Engagement and Development to enhance program, speakers, content, and experiential activities at priority alumni and donor events – in particular – Living the Promise, Homecoming, and Commencement.

- iii. Create new executive communications storytelling resource library and new written and designed tools for Chancellor speaking engagements.
- iv. Successfully launch 4th edition of UCR Magazine.

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.

FY19-20 Objectives:

- a. Finish giving form to simplify and streamline the donor experience
- b. Build on relaunch of annual giving program
 - i. Identify reliable, high-yield acquisition mechanisms (calling, social, etc.)
 - ii. Increase donor retention from our long-run average of 43% to 45-47%
 - iii. Engage development coordinators or other appropriate unit gift officers as annual giving leads to better integrate activities and increase pipeline focus in colleges and schools
 - iv. Better coordinate loyalty giving recognition between stewardship and annual giving through shared accountability for *Bell Tower Society*
- c. Launch faculty/staff campaign and surpass a FY2019-20 goal of 15% for faculty and 13% participation for staff.
- d. Evaluate and fine-tune engagement, especially of graduating seniors and younger alumni, to lay the groundwork for future fundraising campaigns
 - ii. Evaluate *Highlander Day of Service* to determine if a pause in execution is timely
 - iii. Increase Day of Giving (Giving Tuesday) impact
 - 1. Pilot a new vendor platform for 2019 DoG
 - 2. Increase number of gifts received by 10% (from 1,460 to 1,604).
 - 3. Explore relationship with Donor Appreciation Week as part of student education and socialization toward culture of philanthropy

- iv. Deliver value to graduates by enhancing career programming and support
 - 1. AE staff to define qualitative and quantitative measures of success and actively track them beginning in FY2019-20
 - a. Evaluate CASE AM Atlas alumni engagement data and [Alumni Engagement Metrics](#) to integrate relevant data points into the UCRAA scorecard
 - b. Improve collaboration among Alumni Engagement, Career Services, RED, University Communications to create synergy between corporate relations and alumni career program offerings
 - c. Through nominations and turnover, promote a highly engaged, diverse, philanthropic, and governance-focused set of campus-wide boards (UCRAA and UCRF)

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

FY19-20 Objectives:

- a. Execute comprehensive alumni census in Winter 2020 with data incorporated into RE and analytical insights shared with UA Senior Leadership by June 30, 2020.
- b. Improve financial planning, reporting, and data for decision-making
 - i. Finalize production of standardized department reports created by Budget and Operations Managers to AVCs monthly
- c. Expand efforts to reduce manual data entry by June 30, 2020
 - i. Increase cross-training and redundancy to ensure coverage during staff outages
 - ii. Implement batch importing of online gifts
- d. Finalize and implement fully developed talent management plan/program that anticipates the distinctive challenges and opportunities presented by the end of *The Campaign for UC Riverside*

- v. Actively source high-quality, passive candidates to build a pipeline of warm prospects for vacant positions
 - vi. Present to all staff at September 2019 UA meeting a report of talent management metrics that will be tracked and regularly reported, including days to fill, retention, turnover, staff candidate referrals, etc.
 - vii. Evaluate current approach to Employee Engagement Survey and identify sustainability options post-campaign
 - viii. Create and implement a comprehensive, annual plan of professional development opportunities for all staff and supervisors
- e. Improve FAO access to data and interactivity of FE with UCRFS
- i. Implement RE/FE/UCRFS data warehouse and develop unit level self-service reports leveraging Power BI that will allow FAOs to track gift activity and reconcile against GL
 - ii. Implement RE/UCRFS data warehouse and develop unit level self-service reports leveraging Power BI that will allow FAOs to run reports reflecting gift funds with the purpose of the fund and the campus GL balance
 - iii. Create pledge payment forecasting reports by ORG, by department, and by fund to assist CFAOs with cash flow analysis on outstanding pledges
- f. Meet or exceed performance benchmarks for the UCR Foundation endowment returns and grow the combined endowment to \$270 million by June 30, 2020

December 5, 2016
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