

RADFORD UNIVERSITY

2018-2023 Strategic Plan

Embracing the Tradition and Envisioning the Future

Philanthropic Giving and Alumni Engagement

Spring 2019 and Fall 2019 Updates

Strategy 1A: Increase staffing to strengthen and/or grow regional chapters, signature events, collaborative partnerships and personal outreach, create new volunteer program opportunities, and enhance data collection from across all campus partners.



Green = Progress is on track.

Describe progress toward target: The Alumni Relations team secured an additional staff member to focus on growth areas and chapter development. An administrative staff support position will be added to support the Associate Vice President of Advancement and the major gift officers. Additional time will be allocated to meet the needs of the Advancement Services team. This addition will enhance our ability to focus strategically on fundraising and streamline efficiencies for the team overall.

Describe challenges: N/A

Who are you collaborating with? N/A

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Next steps include continuing to review the structure of the team in order to maximize performance.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 1B: Develop parent and family outreach strategies to forge meaningful connections with the university community, while providing opportunities to enhance the overall student experience.



Green = Progress is on track.

Describe progress toward target: There has been successful identification and engagement of the newly established Parents and Families Council. Additionally, the University is utilizing the engagement and services of parents in recruitment of new students. Parent and family related strategies are in place for the identification of those who have the potential to support the University in terms of philanthropy. Strategic invites to events, individual engagement, and opportunities to volunteer have been provided. For the Fall 2019 semester, there will be a separation of Family Weekend and Homecoming, as they will be held on separate weekends with specialized programming.

The University Advancement, Enrollment Management, and Student Affairs staff working group continues their work as a steering committee. The Family Programs Steering Committee has developed a Family Engagement Roundtable comprised of representatives from offices and areas that have a direct connection with families. The Engagement Roundtable was formed with the goal to further develop and coordinate interactions and connections with families. The Family Programs Steering committee continues to make progress in planning Family Weekend. This will be the first year Family Weekend has not been held in conjunction with Alumni Weekend allowing for an intentional and more targeted programming focus. The Highlander Family Advisory Board met during the Volunteer Summit. Feedback received is being used to help inform and shape aspects of future programming and service provision.

The Honors College held a session at the Alumni Volunteer Summit in February 2019. Additionally, outreach to prospective members of the Honors College External Advisory Board has been initiated for first meeting during Homecoming Weekend 2019.

Describe challenges: Challenges include continuing to collect parent data in a timely manner and allowing involvement early on in their Radford University experience. This level of program development and outreach involves multiple areas throughout the University. There is a continued effort to bring these areas together in the most collaborative and meaningful manner possible. The largest challenge is getting parents and families to participate in the programming, which has expanded and largely unknown by the general population.

Also, the Honors faculty member guiding the quarterly newsletter development has left the University. And, prototype work on the newsletter revealed that it is difficult to produce a newsletter that includes high-quality content and professional-looking design without

expert support.

Who are you collaborating with? Division of Enrollment Management; Division of Student Affairs; and Division of Academic Affairs (Honors College)

Does strategy overlap with other goal/strategy? If so, which one? This strategy is related to all Philanthropic Giving and Alumni Engagement strategies, which are closely aligned.

Describe next steps: Next steps include preparing for Family Weekend to be held during Fall 2019. Continue collaboration to support outreach and services for parents and families; continue to promote opportunities for parents and families to connect to Radford University; develop assessment measures to determine value of programming offered to parents and families; consider possible measures to connect engagement of parents and families with student persistence; and increase collaboration across all areas.

For the Honors College, the following next steps are being considered. Work with the Office of University Relations to move prototype newsletter to approved format for University branding and develop contact list of honors graduates using LinkedIn.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: Existing resources are being used at this time.

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement) and Susan Trageser (Vice President for Student Affairs) with support from Kenna Colley (Interim Provost and Vice President for Academic Affairs)

Strategy 1C: Educate, engage and excite students about the the importance and impact of supporting the university, while developing a culture of philanthropy.



Green = Progress is on track.

Describe progress toward target: Nearly 400 students attended our Spring Fever Bash, an event designed to increase awareness among our faculty, staff, and students regarding giving to the university. Last year, 250 students attended. 500 students contributed during our week-long campaign. Additionally, our senior giving continues to be a focus of our annual giving efforts with an increase of \$1,300 compared to last year (as of May 7, 2019).

Describe challenges: Continuing to time our appeals appropriately, use vehicles that are attractive to student demographics, and continue to develop programs that ignite giving back earlier in their Radford career.

Who are you collaborating with? Annual Giving works closely with the Office of the President and the Office of University Relations.

Does strategy overlap with other goal/strategy? If so, which one? Continued partnership with Alumni Relations to increase annual giving revenue and identify potential support and champions for various initiatives.

Describe next steps: Evaluate progress this year and determine appropriate areas to adjust based off of performance, and areas that need additional attention for continued growth and exploration.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: No additional investments

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 1C: Educate, engage and excite students about the the importance and impact of supporting the university, while developing a culture of philanthropy.



Green = Progress is on track.

Describe progress toward target: The first annual Senior Signing Day was held in conjunction with the Russell Hall Block Party and had strong participation. Preliminary discussions have occurred for the development of a committee to address the two major challenges, one, broadening the student's understanding of giving beyond just the monetary amount, but also giving of their time and talent and two, to incorporate giving into the student experience in a deeper way.

Describe challenges: The largest challenge continues to be creating a cultural shift that focuses on students giving back and participating in programming, which is newly-expanded in the amount of focus and number of initiatives.

Who are you collaborating with? University Advancement (Alumni Relations); Student Affairs (All Areas); Enrollment Management (Financial Aid); and Academic Affairs (Center for Career and Talent Development)

Does strategy overlap with other goal/strategy? If so, which one? This strategy is related to all Philanthropic Giving and Alumni Engagement strategies, which are closely aligned.

Describe next steps: Continue the development of scholarship creation initiatives, develop committees ensure a broader understanding of giving and ensure that giving of time, talent or treasure is part of the student experience.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: Existing resources are being used at this time.

Name of person completing this Strategic Plan Progress Report: Susan Trageser (Vice President for Student Affairs)

Strategy 1D: Increase awareness about the value and impact of alumni and donor engagement with faculty, staff, retirees and community to leverage expertise, provide a welcoming campus environment and showcase opportunities for support.



Green = Progress is on track.

Describe progress toward target: The Office of the President and the Office of Alumni Relations have successfully launched the Highlander Family Tour, visiting eight locations in North Carolina and Virginia where we have large populations of alumni. At the conclusion of the tour, we expect to have engaged with approximately 600 alumni, encouraging them to become more engaged with the university. Major gift officers were strategically placed at each event and utilized each opportunity to cultivate potential donors and steward existing supporters. The Volunteer Summit was held in February 2019 and hosted approximately 175 alumni and friends who were exposed to numerous volunteer opportunities with each academic Dean providing breakout sessions exposing those interested in select college opportunities and updates. Numerous regional events have been conducted, including our largest golf tournament to date. Collaboration with Admissions to welcome admitted students and their families continue along with an ever-growing partnership with Career and Talent Development - providing internship opportunities for current students.

Describe challenges: None

Who are you collaborating with? Partnership with the Office of the President, Admissions, and Career and Talent Development continue to grow and prove to be successful. The Alumni Office continues to work with all aspects of the campus community to promote alumni engagement opportunities both in and out of the classroom. The annual Volunteer Summit brings awareness to the work of each of our colleges, ways to engage on campus with students, and support our athletic programming. The Identification of potential donors continues to be a priority in all aspects of their work.

Does strategy overlap with other goal/strategy? If so, which one? No

Describe next steps: Evaluate the events and programs conducted in the fiscal year for efficiencies, value, and additional collaboration opportunities. Define the calendar for the 2019-2020 year and consider the public launch of the capital campaign.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: Investment in support of the Highlander Family Tours were made in partnership with the Radford University Foundation.

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 2A: Increase staffing in the advancement office in order to improve capacity to engage and raise funds.



Check = This goal and strategy of the strategic plan has been successfully completed.

Describe progress toward target: We have the allocated positions requested to meet the fundraising needs of each college and athletics for this phase of the campaign and maturity of the overall operation. As we continue to grow the amount of dollars raised, additional support may be needed as we prepare for the next strategic plan.

Describe challenges: N/A

Who are you collaborating with? Office of the President; Division of Finance and Administration; and Department of Athletics

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Continue to assess the performance of the team and respond to the needs and fully utilize opportunities for realignment presented by retirements or staff turnover.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 2B: Increase participation in alumni giving through leadership giving, student philanthropy, young alumni giving and affinity-based giving.



Green = Progress is on track.

Describe progress toward target: We continue to focus on increasing alumni participation through all mechanisms of the advancement operation. We are on progress to see continued growth, final figures will be provided at the end of the fiscal year. Our Highlander Family Tours are expected to increase participation, coupled with private capital campaign related events.

Describe challenges: N/A

Who are you collaborating with? Office of the President; Division of Academic Affairs; Division of Student Affairs; and Athletics Department

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Analyze final fiscal year results; determine areas of opportunity; and develop strategic initiatives to respond to the assessment.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 2C: Secure at least \$15 million annually by 2023 through annual fund, major gifts, planned gifts and corporate/foundation gifts.



Green = Progress is on track.

Describe progress toward target: Last fiscal year, the goal of raising \$15 million was accomplished. Our structure has centered around a continued focus of raising \$15 million annually. This year, we are on track to raise \$13 million.

Describe challenges: N/A

Who are you collaborating with? Entire campus community and all University constituents with articular collaboration with the Office of the President and the Office of University Relations

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Analyze FY19 final fundraising data; identify areas of opportunity; and structure fundraising targets for individual gift officers to meet the \$15 million fundraising target.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 3A: Develop and execute an education plan to inform constituents on the variety of ways to give and how giving and participation impact rankings, showcase needs and highlight success stories.



Green = Progress is on track.

Describe progress toward target: The Highlander Family Tour responds to this particular target through a face-to-face interactive strategy with a broad base of alumni. Providing them with opportunities to meet key leaders, learn about engagement, and give back. Alumni and donor features are created and shared monthly, thereby highlighting alumni who are strongly engaged and connected with the University (shared on website, social media, RU Connected, and The Magazine of Radford University). Incorporation of alumni testimonials in direct mail campaigns, thereby highlighting the value of giving back. Strategically recognizing alumni and donors in speaking engagements, campus recognition opportunities, and the development of the Spirit of the Tartan award for engaged alumni.

Describe challenges: N/A

Who are you collaborating with? Office of the President and the Office of University Relations

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Continued focus on reflection, evaluation, and opportunities to increase awareness.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 3B: Plan and implement stewardship programs.



Green = Progress is on track.

Describe progress toward target: Focus on enhancement of current stewardship events (Partners in Excellence programming and format, Celebration of Giving, and individual donor recognition opportunities). In the Call Center, student callers are incorporating thank you calls in our call center calendar. Evaluating a consecutive giving society with a launch in FY20.

Describe challenges: Staff assignment and program ownership

Who are you collaborating with? Office of the President

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Implement consecutive giving society.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)

Strategy 3C: Develop relevant materials and events.



Green = Progress is on track.

Describe progress toward target: Case for Support for Capital Campaign completed and available for distribution.

Describe challenges: N/A

Who are you collaborating with? Office of the President; Division of Academic Affairs; Division of Student Affairs; Department of Athletics; and Office of University Relations

Does strategy overlap with other goal/strategy? If so, which one? N/A

Describe next steps: Develop a Capital Campaign website.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: N/A

Name of person completing this Strategic Plan Progress Report: Wendy Lowery (Vice President for University Advancement)