

RADFORD UNIVERSITY

2018-2023 Strategic Plan

Embracing the Tradition and Envisioning the Future

Philanthropic Giving and Alumni Engagement

Spring 2020 and Fall 2020 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.



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

Describe progress toward target: While we have met the expectations of hiring additional staff and the continued addition of alumni chapters, we remain steadfast in the evaluation of an appropriate organizational chart that maximizes our ability to expand outreach and broaden our constituency base.

Describe challenges: N/A

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

Does strategy overlap with other goal/strategy? If so, which one? Philanthropic Giving and Alumni Engagement Goal 2, Strategy A

Describe next steps: Next steps include continuing to ensure that our engagement strategies are effective and optimal. All additional staff continue to meet the expectations of the organization.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: No additional investments were made during 2020, and no additional staffing requests (i.e. expanded or new investments) will be made soon.

Name of person completing this Strategic Plan Progress Report: Wendy Lowery, Vice President for Advancement and University Relations

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:

- Volunteer Summit
 - Parent and family information session was hosted. The session provided an opportunity to determine interest in Parents Council, as well as best ways to communicate and areas of interest for continued engagement.
- Legacy Family Engagement
 - Although in-person events were cancelled, virtual communication and continued planning for the upcoming year are in process. Legacy families are engaged in a variety of ways throughout the year.
- Campaign
 - A sub-committee of the campaign committee discusses parent and family engagement for ways to engage, cultivate and solicit their support.
- Annual Giving
 - Parents and families receive tailored solicitations via direct mail and phone center calls.

Describe challenges: Due to the pandemic, a number of events were cancelled and/or modified.

Who are you collaborating with? Division of Enrollment Management and Division of Student Affairs

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

Describe next steps: Next steps include continuing to focus on experiences for parents and families to help them feel engaged and scheduling a Parents Advisory Council meeting in Spring 2021 in collaboration with the Division of Student Affairs.

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 Advancement and University Relations

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:

- Annual Giving
 - TAG DAY - This is a philanthropic educational, but fun competitive event.
 - Greek Life Challenge - Student leaders helped plan and host a fundraiser for Greek Life initiatives.
 - Senior Giving - Although slightly halted this year due to the pandemic, we engaged students with planning and conducting the Senior Giving effort.
 - Telephone Outreach Program - Students were trained to understand the value of giving and its impact.

- Campaign
 - Students participated in a sub-committee on the campaign designed to help inform giving strategies and student engagement.

- Stewardship
 - Students helped thank our donors virtually through a video that shared the value of donor support and how it impacted their lives

Describe challenges: Engaging students during the COVID-19 global health pandemic presented some challenges for us in 2020. However, no programming was completely cancelled or stalled as we shifted the formats for engagement, timing of appeals, etc.

Who are you collaborating with? Division of Student Affairs

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

Describe next steps: Continue to engage students in each aspect of our work through development of initiatives that students will respond favorably and maximize opportunities to connect students with donors to truly understand the impact and motivation of charitable support. The team continues to be diligent to ensure that students have a seat at the table in planning.

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 Advancement and University Relations

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:

- COVID-19 Emergency Funds Effort
 - Through engagement with faculty, staff, students and community members, we raised over \$23,000 for emergency relief funds across all academic affairs and student affairs functions. The effort was in response to requests of our faculty and staff who wanted to be engaged in fundraising in support of our students.
- The HIVE (An online giving platform that reaches a broad audience and promotes a variety of opportunities and campus initiatives to support)
 - It allows people to learn more about the impact of giving and how to make a gift online.
- Reunion Giving (An enhanced effort to organize a volunteer committee to engage alumni during Homecoming to support the University).
 - It was very successful.
- Highlander Wisdom Series
 - Over twenty virtual engagement seminars were hosted and led by alumni and was a major source in engaging a broader base.

Describe challenges: Not being able to meet in-person hinders the ability to forge meaningful relationships. However, we felt that our reach was expanded due to the ability to participate in activities virtually.

Who are you collaborating with? Division of Academic Affairs (all colleges); Division of Student Affairs; and Athletics

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

Describe next steps: We will continue to focus on opportunities for people to connect with the University and understand exactly how to make a gift and its impact. We will focus on showcasing the impact of giving in a more direct manner (citing actual dollar amounts that support certain programs, participation rates, etc.).

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 Advancement and University Relations

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: All fundraising positions were established and have been filled

Describe challenges: N/A

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

Does strategy overlap with other goal/strategy? If so, which one? Philanthropic Giving and Alumni Engagement Goal 1, Strategy A

Describe next steps: N/A

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 Advancement and University Relations

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:

- The Office of Advancement and University Relations is working towards a continued emphasis on growing our alumni participation. The Alumni Association Board of Directors has enhanced its effort to focus on fundraising, engagement and a broader base of volunteer support. Our Annual Giving staff is revamped its efforts to have a more strategic and analytical focus on appropriate mailing segmentation, best practices and appeal types. We transitioned our online giving platform and anticipate a larger response in the coming year. The Annual Giving, Alumni Relations and Major Gifts teams are working more cohesively on strategy development and engagement opportunities with alumni.
- The College of Education and Human Development hosts an annual breakfast during Homecoming for alumni, especially to honor those celebrating their golden reunion. There is a College of Education and Human Development Reunion Planning Committee consisting of alumni, members of the golden class and staff from the Office of Advancement and University Relations, who help the Dean plan the annual breakfast. This group meets throughout the spring and summer to plan the breakfast. In 2020, the reunion planning committee (classes of '69 and '70) created an Educators Scholarship, which was fully endowed by the end of the fall term.

Describe challenges: Donor saturation and mindshare is a challenge for all charitable organizations. Ensuring our strategies are appealing, impactful and timed appropriately are key.

Who are you collaborating with? Office of Advancement and University Relations

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

Describe next steps: Next steps include a continued focus on best practices with maximization of existing opportunities for engagement and donor education. We will also work to ensure all alumni events are in tune with supporting an increase in the alumni participation rate. For the College of Education and Human Development, the process of recruiting members of the class of '71 to serve on the Reunion Planning Committee will begin.

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 Advancement and University Relations and Tamara Wallace, Dean of the College of Education and Human Development

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:

We are focused on a variety of areas to expand fundraising efforts to include the following:

- Increase in dollar value of proposals submitted;
- Engage in individual portfolio reviews and analysis;
- Create and track annual work plans for all gift officers;
- Increase corporate/foundation proposals;
- Maximize volunteer boards/committees for personal giving and referrals; and
- Launch campaign and related preparation.

The Davis College of Business and Economics endowment account grew from to \$4.16 million (at the end of the 2018-2019 academic year) to \$4.72 million (as of May 2020).

Notable gifts include:

- Gift from BB&T to launch the BB&T Leadership Program;
- Gift from Shelor Motor Mile (while a University-wide gift, Davis College students represent a significant proportion of the scholarship awardees);
- Naming gift from Dr. Shalini Perumpral, thereby establishing a scholarship;
- Naming gift from Michael and Gay Donnelly; and
- 214 other individual gifts, totaling \$144,525.

Describe challenges: The pandemic hindered our in-person connections and some resist making major gifts during a time of financial uncertainty.

Who are you collaborating with? Entire campus

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

Describe next steps: Next steps include: utilizing the campaign to help broaden interest and increase support; maximize virtual opportunities to connect with people at a great distance; ensure staff have the resources needed to be successful and are held accountable for expected results; and continue to focus on volunteer referrals for major gift engagement.

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 Advancement and University Relations and Joy Bhadury, Dean of the Davis College of Business and Economics

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: We are focused on a variety of areas to expand educational efforts.

- Magazine
 - This is a major resource for promoting a variety of ways to give and the different types of contributions provided.
- Volunteer Summit
 - This provides an opportunity for volunteers to learn about giving, how to give and impact. In February 2020, a session solely focused on philanthropy and University rankings.
- Campaign
 - This provides all constituencies with an opportunity to learn, engage and participate in charitable support of the University.
- Website
 - This provides a virtual platform for the continuous sharing of University information and news in real time.

Describe challenges: N/A

Who are you collaborating with? Entire campus

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

Describe next steps: Next steps include launching the public phase of the campaign with collateral that provides extensive information on areas to support; how it makes a difference; and testimonials for sharing impact. A campaign website will accompany the public launch this spring, which will have robust information regarding giving, donor testimonials, etc.

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 Advancement and University Relations

Strategy 3B: Plan and implement stewardship programs.



Green = Progress is on track.

Describe progress toward target:

- An Honor Roll of Donors is produced annually to recognize donors in print and web formats. Also, the Foundation Annual Report recognizes individual donors, as well as specific programs and overall impact. The Partners in Excellence brochure and video were developed and shared in lieu of in-person event. Also, a society for first-time donors will launch in Spring 2021.
- In this reporting period, the College of Visual and Performing Arts worked with the Office of Advancement and University Relations to create two publications, "Celebrate the Arts" and "Through the Lens" for distribution to select alumni, The College also played a critical role in campaign planning and targeted campaigns.

Describe challenges: Despite pandemic limitations, University officials continue to meet with donors on a regular basis through virtual gatherings or small in-person activities.

Who are you collaborating with? Office of the President; Office of Advancement and University Relations; and College of Visual and Performing Arts

Does strategy overlap with other goal/strategy? If so, which one? All goals and strategies under Philanthropic Giving and Alumni Engagement

Describe next steps: Next steps include launching a new society honoring first-time donors and consecutive donors and increase focus on Legacy of 1910, our planned giving donor 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 Advancement and University Relations and Margaret Devaney, Dean of the College of Visual and Performing Arts

Strategy 3C: Develop relevant materials and events.



Green = Progress is on track.

Describe progress toward target: We have developed a schedule of events and collateral that supports fundraising cultivation and stewardship. Our Partners in Excellence event, Celebration of Giving, Campaign small groups (private events tailored by donor and prospects), the Volunteer Summit and Homecoming festivities all support our fundraising activities. A Guide to Giving, a Case for Support and a Guide to Planned Giving are in circulation and provide a great deal of collateral support for our team.

Describe challenges: Challenges include continuing to focus on maximization of in-person events; adjusting to COVID-19 protocols; and updating collateral material regularly to ensure vibrancy and relativity.

Who are you collaborating with? Office of the President and Division of Finance and Administration (Facilities)

Does strategy overlap with other goal/strategy? If so, which one? All goals and strategies under Philanthropic Giving and Alumni Engagement

Describe next steps: Next steps include focusing on engagement opportunities, while adhering to COVID-19 guidelines, and executing a successful virtual campaign launch in Spring 2021.

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 Advancement and University Relations