

RADFORD UNIVERSITY

2018-2023 Strategic Plan

Embracing the Tradition and Envisioning the Future

Philanthropic Giving and Alumni Engagement Fall 2018 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: Since the adoption of the strategic plan, additional staffing has been added to University Advancement in both office-based and college-based personnel. The current staffing level for 30 personnel is broken down in the following areas.

Vice President for University Advancement Office: 3

Major Gifts: 9

Alumni Relations: 6

Annual Giving: 3

Donor Relations: 1

Advancement Communications: 2

Advancement Services and Operations: 6

Describe challenges: N/A

Who are you collaborating with? University Advancement Team

Does strategy overlap with other goal/strategy? If so, which one? This strategy provides the personnel needed in order to execute the work of University Advancement and accomplish the strategies contained under Philanthropic Giving and Alumni Engagement.

Describe next steps: University Advancement strives to maintain and attract top talent in order to enhance current outreach and programming opportunities.

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

Name of person completing this Strategic Plan Progress Report: Ashley Schumaker (Chief of Staff and Vice President for University Relations) on behalf of 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: The Office of New Student Programs was recently renamed to reflect the University's focus on parent engagement.

As part of both Homecoming and Family Weekend, which were held on the same weekend in October 2018, a parent advisory group/family focus group meeting was held. Parents were selected by Student Affairs and University Advancement leadership and invited to participate in the initial conversation. Some of the parent participants were alumni. As such, they provided a multi-faceted perspective. Participants provided a wide range of feedback on a variety of events, including Quest. Also, during Family Weekend, there was a session held titled, "Communicating with Your Student." During the session, Bruce Hayden, Associate Dean of Students and parent of a Radford University student, talked about how parents and students can effectively communicate.

Describe challenges: The largest challenge is getting parents and families to participate in the programming, which has expanded and largely unknown by the general population.

Who are you collaborating with? Enrollment Management (New Student and Family Programs); Student Affairs (Student Life); University Relations; and University Advancement (Alumni Affairs)

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 collaboration to support outreach and services for parents and families. Continue to promote opportunities for parents and families to connect to Radford. 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. Increase collaboration across all areas.

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



Green = Progress is on track.

Describe progress toward target: University Advancement, through Alumni Relations, has a growing senior giving program in which seniors provide a nominal donation to the University. This is a symbolic gesture that begins their service as both alumni and donors immediately following graduation. For 2018, \$37,174 was raised for the Highlander Senior Class Scholarship with \$5,049 of that total amount from 474 senior donors. Also, during Spring Fever Bash 2018, 250 students participated.

Describe challenges: The largest challenge is 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); 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 to ensure that giving is a part of the student experience. Increase collaboration across all areas in order to maximize student engagement and giving.

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.



Red = No progress has been reported.

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



Green = Progress is on track.

Describe progress toward target: Since the adoption of the strategic plan, additional staffing has been added to University Advancement in both office-based and college-based personnel. The current staffing level for 30 personnel is broken down in the following areas.

Vice President for University Advancement Office: 3

Major Gifts: 9

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Annual Giving: 3

Donor Relations: 1

Advancement Communications: 2

Advancement Services and Operations: 6

Describe challenges: N/A

Who are you collaborating with? University Advancement Team

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: This strategy provides the personnel needed in order to execute the work of University Advancement and accomplish the strategies contained under Philanthropic Giving and Alumni Engagement.

Describe next steps: University Advancement strives to maintain and attract top talent in order to enhance current outreach and programming opportunities.

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

Name of person completing this Strategic Plan Progress Report: Ashley Schumaker (Chief of Staff and Vice President for University Relations) on behalf of 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.



Red = No progress has been reported.

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: For Fiscal Year 2018, the University secured \$15.2 million in philanthropic giving to support programs and students. Of the \$15.2 million, \$11.1 million was dedicated to student scholarships. The strategic plan established a goal of raising \$15 million annually by 2023. As such, the goal was met in the first year of implementation.

Describe challenges: The University averaged approximately \$4 million per year before record-breaking fiscal years in 2016 at \$8 million followed by 2017 at \$10.7 million and 2018 at \$15.2 million. As such, the challenge will be to continue the forward momentum and the increasing levels of support.

Who are you collaborating with? University Advancement Team; Office of the President; Academic Affairs (All Colleges); and University Relations

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: The University will continue to build new relationships and enhance existing relations. University Advancement, in collaboration with many campus entities, will continue to identify programmatic and students needs and align those with current and future donors.

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: Ashley Schumaker (Chief of Staff and Vice President for University Relations) on behalf of 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.



Yellow = Progress has begun, but may be delayed.

Describe progress toward target: The scholarship function is very complex and involves University Advancement and other entities on-campus and off-campus. With so many tentacles and all with a variety of objectives, we must work diligently to ensure that we are all on the same page in order to create an opportunity. In Spring 2018, a committee was formed to include representation from all entities in order to better work together to meet the needs of all parties involved, while focusing on improving our ability to steward scholarship benefactors and providing every opportunity to recruit and retain students through scholarship support.

Describe challenges: The education plan was to be developed in Spring 2018 with implementation in Fall 2018. The plan remains under development at this time.

Who are you collaborating with? University Advancement Team; Radford University Foundation, Inc.; Enrollment Management (Financial Aid); and Athletics Department

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: For stewardship, University Advancement is currently working within our team to focus on building a comprehensive stewardship plan by utilizing existing staff. For promoting philanthropic awareness, University Advancement is evaluating our website and ensuring that it is easy to use and promotes current contributions and alumni accomplishments. For scholarship, University Advancement is focusing on objectives identified in the Fall 2018 committee meeting, the first official meeting of newly-formed committee.

Describe any new investments or reinvestments (realignment of existing resources) to this initiative: All other initiatives at this stage have been implemented with minimal budgetary requirements and through support from the Radford University Foundation, Inc.

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: University Advancement continues to regularly host signature events in order to acknowledge donors for their engagement with and support of the University. These events are also critical in attracting and inspiring new donors. On April 6, 2018, the Celebration of Giving events were held for the past academic year. On October 18, 2018, the Partners in Excellence Luncheon was held. The Celebration of Giving events will be held on April 5, 2019. These events are for the current academic year. Other annual events include Homecoming and Reunion Weekend and the Alumni Winter Celebration. During Summer 2018, University Advancement hosted the Highlander Hometown Tour with 31 stops in 25 cities across four states. This event was highly successful and has provided a strong foundation for a series of Spring and Summer 2019 events to be hosted by President Brian O. Hemphill, Ph.D. throughout the Commonwealth and in neighboring states.

The following donor recognition areas are available and highlighted on the University Advancement website: Benefactor (\$25,000 and above); Investor (\$10,000 - \$24,999); Partner (\$5,000 - \$9,999); Shareholder (\$2,500 - \$4,999); Charter (\$1,000 - \$2,499); Fellow (\$750 - \$999); Ambassador (\$500 - \$749); Associate (\$250 - \$499); Century (\$100 - \$249); and Friends (up to \$99), as well as the Society of 1910; President's Circle; Businesses, Corporations, and Foundations; and Matching Gift Companies.

Describe challenges: University Advancement continues to host events and provide related programming that is both new in look and feel. It is important to keep these events fresh to ensure donors and other individuals remain engaged.

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

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: These programs will continue to be offered, and methods for expansion will be evaluated and implemented where possible.

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: Ashley Schumaker (Chief of Staff and Vice President for University Relations) on behalf of Wendy Lowery (Vice President for University Advancement)

Strategy 3C: Develop relevant materials and events.



Green = Progress is on track.

Describe progress toward target: University Advancement continues to regularly disseminate high-quality materials and consistently host engaging events. Examples of such work include the creation and dissemination of the “Giving Thanks” video series before the 2017 and 2018 end of year holidays and The Magazine for Radford University.

Describe challenges: University Advancement continues to disseminate materials, host events, and provide related programming that is both new in look and feel. It is important to keep these materials and events fresh to ensure donors and other individuals remain engaged.

Who are you collaborating with? University Advancement Team; Office of the President; and University Relations; and Information Technology (Printing Services)

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: The materials will continue to be produced, and events will continue to be hosted, while methods for expansion will be evaluated and implemented where possible.

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: Ashley Schumaker (Chief of Staff and Vice President for University Relations) on behalf of Wendy Lowery (Vice President for University Advancement)