

**Strategic Action Plan 2019-2029**

**Focus Area 7: Institutional Advancement**

**Mission:** The University of Holy Cross, a Catholic institution of higher learning, is an inclusive student-centered learning community focused on academic excellence and innovative teaching. Rooted in the traditions of the Marianites of Holy Cross, the University is committed to educating the minds and hearts of its students through freedom of inquiry, the pursuit of truth, and compassionate care for all.

**Committee Members:** Calloway, Emily (Student Representative), Caruso, Joe (Graduate Representative), Catherman, David (Cabinet), Costello, John, Ph.D., (Consultant—ex officio), Fitzpatrick, Bryan (Trustee), Guerin, Brenton (Student Representative), Jacob, Ph.D., Jean (Staff Representative), Laborde, M.D., Monroe (Trustee), Lacour, MSC, Sister Ann (Trustee), Lopez, Mike (Graduate Representative), Lopez, Pam (Staff Representative), McNeely III, Ed.D., Stanton (Graduate Representative), Picard, Matt (Graduate and Staff Representative), Powell III, M. Cleland (Trustee), Remley, Ph.D., Ted (Faculty Representative), Tedesco, Kenneth (Cabinet and Chair), Van Voorhees Kirschman, Rachel (Trustee), Wolfe, Scott (Trustee)

## Philanthropy & Stewardship

**Goal 1: Between FY 2019-20 and 2022-23, the University of Holy Cross shall develop more of a "collaborative advancement culture" whereby stakeholders (historic, current, and new) will understand and live our mission as evidenced by increased philanthropy and stewardship.**

**Objective 1: To be in contact on a regular basis with key current off-campus stakeholders**

ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Support the President's Advisory Board as they continue to grow and serve as informed community advocates.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	The more external publics familiar with the University's programs, mission, and heritage, the more speedily our community profile continues to rise. An elevated community profile and informed reputation attracts students, faculty, volunteers, donors, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	A minimum of two informational/motivational meetings per fiscal year of the President's Advisory Council'; a minimum of one annual meeting per year of the UHC Ambassadors; a minimum of three off-campus face-to-face informational meetings each month with opinion leaders such as, media representatives, secondary school "gatekeepers," service clubs, governmental and religious officials		
DOCUMENTATION	Minutes from Advisory Council and/or Ambassador meetings; internal lists documenting, in detail, each visit with off-campus publics		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and the President will be primarily responsible for implementation. Dependent on the nature of the outreach, other senior UHC faculty, administrators, and staff will be enlisted, such as the Director of Marketing.		
ESTIMATED COSTS	Nominal. Occasionally, refreshments will be needed for meetings. UHC logo items may be needed for promotions.		
STATUS	In process		

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ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Support the Ambassadors group as they continue to grow and serve as informed community advocates.
	<input type="checkbox"/>	M	
	<input checked="" type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	The more external publics familiar with the University's programs, mission, and heritage, the more speedily our community profile continues to rise. An elevated community profile and informed reputation attracts students, faculty, volunteers, donors, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	A minimum of two informational/motivational meetings per fiscal year of the President's Advisory Council'; a minimum of one annual meeting per year of the UHC Ambassadors; a minimum of three off-campus face-to-face informational meetings each month with opinion leaders such as, media representatives, secondary school "gatekeepers," service clubs, governmental and religious officials		
DOCUMENTATION	Minutes from Advisory Council and/or Ambassadors meetings. Internal lists documenting, in detail, each visit with off-campus publics.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and the President will be primarily responsible for implementation. Dependent on the nature of the outreach, other senior UHC faculty, administrators, and staff will be enlisted, such as the Director of Marketing.		
ESTIMATED COSTS	Nominal. Occasionally, refreshments will be needed for meetings. UHC logo items may be needed for promotions.		
STATUS	In process		

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ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Opinion leaders within the community shall receive frequent "From the President" communications.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	The more external publics familiar with the University's programs, mission, and heritage, the more speedily our community profile continues to rise. An elevated community profile and informed reputation attracts students, faculty, volunteers, donors, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Review timeliness of communication dissemination and commensurate feedback.		
DOCUMENTATION	Communication file and responses		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President, the President, and the Director of Marketing		
ESTIMATED COSTS	None--communications will be electronic		
STATUS	Yet to be implemented.		

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ACTION STEP 4 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	The alumni e-newsletter shall continue to be improved and accurately distributed.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	The more external publics familiar with the University's programs, mission, and heritage, the more speedily our community profile continues to rise. An elevated community profile and informed reputation attracts students, faculty, volunteers, donors, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Review timeliness of communication dissemination and commensurate feedback.		
DOCUMENTATION	Communication file, survey results, and other responses		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President, the President, the Director of Alumni Relations, and the Director of Marketing		
ESTIMATED COSTS	None--communications will be electronic		
STATUS	In process		

<b>Objective 2: To be in contact on a regular basis with key prospective off-campus publics</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	The President and other officials, as needed strategically, will be deployed to service clubs, media sessions, neighborhood and/or church groups "to spread the UHC story" to those unfamiliar with us.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	The more external publics familiar with the University's programs, mission, and heritage, the more speedily our community profile continues to rise. An elevated community profile and informed reputation attracts students, faculty, volunteers, donors, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Attendance at a minimum of three off-campus face-to-face informational meetings per month with opinion-leaders such as media representatives, secondary school "gatekeepers," service clubs, governmental and religious officials, etc.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Meeting correspondence; thank-you notes on UHC letterhead, as appropriate; staff contact reports from each substantive contact with clearly expressed "Next Steps"		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and additional team members, as needed		
ESTIMATED COSTS	UHC logo items may be needed for promotions.		
STATUS	TBA		

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Objective 3: To meet with key on-campus UHC stakeholders for updates and idea-sharing			
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Meet, as needed, on a semester basis with Deans.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	With members of the internal "family" of UHC not simply informed of our mission, and what constitutes a "Team UHC Advancement Culture", an <i>esprit de corps</i> will grow which will be visible to all on a daily basis to current and prospective students, faculty, staff, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Annual record of meetings		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Meeting correspondence, Cabinet minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Provost and Vice President for Academic Affairs, Deans, and others as appropriate		
ESTIMATED COSTS	None		
STATUS	TBD		

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ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Meet, on a periodic basis, with Academic and Graduate Councils.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	With members of the internal "family" of UHC not simply informed of our mission, and what constitutes a "Team UHC Advancement Culture", an <i>esprit de corps</i> will grow which will be visible to all on a daily basis to current and prospective students, faculty, staff, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Included with above action steps.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Cabinet minutes; minutes from Academic and Graduate Council meetings		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and additional team members, as needed		
ESTIMATED COSTS	None		
STATUS	TBD		



Focus Area 7: Institutional Advancement

ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Design and lead informational presentations regarding Advancement at Fall Convocations.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	With members of the internal "family" of UHC not simply informed of our mission, and what constitutes a "Team UHC Advancement Culture", an <i>esprit de corps</i> will grow which will be visible to all on a daily basis to current and prospective students, faculty, staff, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Convocation agendum and documents, as applicable		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Convocation agendum and documents, as applicable; Cabinet minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and team members		
ESTIMATED COSTS	None		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 4 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	The Institutional Advancement Committee will meet quarterly throughout the fiscal year.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	With members of the internal "family" of UHC not simply informed of our mission, and what constitutes a "Team UHC Advancement Culture", an <i>esprit de corps</i> will grow which will be visible to all on a daily basis to current and prospective students, faculty, staff, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Quarterly meeting agenda and minutes		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Quarterly meeting agenda and minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and committee members		
ESTIMATED COSTS	Nominal. Refreshments may be needed for on-campus meetings.		
STATUS	TBD		

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ACTION STEP 5 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Design and lead a presentation regarding Advancement for the Student Government Association, periodically.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2029		
RATIONALE (relationship to enrollment, quality programs)	With members of the internal "family" of UHC not simply informed of our mission, and what constitutes a "Team UHC Advancement Culture", an <i>esprit de corps</i> will grow which will be visible to all on a daily basis to current and prospective students, faculty, staff, etc.		
ASSESSMENTS & BENCHMARKS (include time frame)	Meeting correspondence, agenda, and minutes		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Meeting correspondence, agenda, and minutes; Cabinet minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	The Executive Vice President and additional team members, as needed		
ESTIMATED COSTS	None		
STATUS	TBD		

<b>Goal 2: Between FY 2019-20 and 2022-23, the University of Holy Cross shall continue to meet or exceed its gift and grant goals as set within the University's Board-approved operating budget.</b>			
<b>Objective 1:</b> Continue to grow the major gift program by addressing individuals, foundations, and corporations as sources of capital and endowment funding, with an emphasis on outright as well as planned giving.			
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Fund, ideally for FY 2019-20, a fulltime Database/Research professional within the Advancement Division. She/he will be critical to realizing the following Action Steps and a myriad of other activities detailed at every step of this Plan.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	The hire of a Database/Research professional will facilitate planned giving (bequests, annuities, etc.) that provides a pipeline of future gift income, and often are attractive to donors in part because of charitable gift tax advantages. For many, 'planned giving' vehicles allow donors to provide for an eventual major gift which could not be assembled during their lifetimes.		
ASSESSMENTS & BENCHMARKS (include time frame)	Position announcement, job description, and signed contract		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Position announcement, job description, and signed contract		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy		
ESTIMATED COSTS	Full-time Database/Research Officer, beginning no later than July 1, 2019 (\$50,000 + 20% benefits = \$60,000 annually)		
STATUS	TBD		

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ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Update contact information of all individuals who have participated in the gift program (appending of emails, physical addresses, phone, employment information, etc.).
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While gifts of every level, received at any time, are important to the University and support enrollment, it is a practical general fact that the higher the amount of the gift, the more magnified its impact. Meantime, 'planned giving' (bequests, annuities, etc.) provides a pipeline of future gift income, and often is attractive to donors in part due to charitable gift tax advantages. For many, 'planned giving' vehicles allow donors to provide for an eventual major gift which could not be assembled during their lifetimes.		
ASSESSMENTS & BENCHMARKS (include time frame)	In FY 20, secure contract for complete accuracy update of UHC database; in FY 21, acquire and begin use of sophisticated prospect tracking and undertake "Wealth Screening"; provide routine stewardship reports to those sources funding endowments and other major gifts.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Completed sales contract/product delivery regarding prospect tracking software; updates contact list		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy, Database/Research Officer (proposed)		
ESTIMATED COSTS	Email update, once-per-fiscal year: \$1000 (\$3000 for next three fiscal years)		
STATUS	TBD		

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ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Enlist "wealth screening" as one means of identifying who among "our universe" may have the capacity for a gift of \$10,000 or higher, based on publicly available wealth/giving predictors.
	<input type="checkbox"/>	M	
	<input checked="" type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While gifts of every level, received at any time, are important to the University and support enrollment, it is a practical general fact that the higher the amount of the gift, the more magnified its impact. Meantime, 'planned giving' (bequests, annuities, etc.) provides a pipeline of future gift income, and often is attractive to donors in part due to charitable gift tax advantages. For many, 'planned giving' vehicles allow donors to provide for an eventual major gift which could not be assembled during their lifetimes.		
ASSESSMENTS & BENCHMARKS (include time frame)	In FY 21, acquire and begin use of sophisticated prospect tracking and undertake "Wealth Screening"; provide routine stewardship reports to those sources funding endowments and other major gifts.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Completed sales contract/product delivery regarding prospect tracking software, updated contact list, stewardship reports		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy, Database/Research Officer (proposed)		
ESTIMATED COSTS	Wealth Screening: \$1,500 (\$1500 for one of three fiscal years)		
STATUS	TBD		

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ACTION STEP 4 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Acquire software (i.e., SALESFORCE) essential to "prospect tracking," so as to inventory progress with/status of individuals within the continuum of identification, cultivation, solicitation, stewardship.
	<input type="checkbox"/>	M	
	<input checked="" type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While gifts of every level, received at any time, are important to the University and support enrollment, it is a practical general fact that the higher the amount of the gift, the more magnified its impact. Meantime, 'planned giving' (bequests, annuities, etc.) provides a pipeline of future gift income, and often is attractive to donors in part due to charitable gift tax advantages. For many, 'planned giving' vehicles allow donors to provide for an eventual major gift which could not be assembled during their lifetimes.		
ASSESSMENTS & BENCHMARKS (include time frame)	In FY 21, acquire and begin use of sophisticated prospect tracking and undertake "Wealth Screening".		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Completed sales contract/product delivery regarding prospect tracking software, updated contact list, stewardship reports		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy, Database/Research Officer (proposed)		
ESTIMATED COSTS	Wealth Screening: \$1,500 (\$1500 for one of three fiscal years); purchase, each fiscal year of authoritative planned giving mailings, tailored to UHC \$800 (\$2400 for next three fiscal years)		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 5 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Continue identification of major gift prospects by sharing rosters of individuals with the Board of Trustees and the President's Advisory Council to ascertain "who knows whom" and what role she or he could perform on our behalf.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While gifts of every level, received at any time, are important to the University and support enrollment, it is a practical general fact that the higher the amount of the gift, the more magnified its impact. Meantime, 'planned giving' (bequests, annuities, etc.) provides a pipeline of future gift income, and often is attractive to donors in part due to charitable gift tax advantages. For many, 'planned giving' vehicles allow donors to provide for an eventual major gift which could not be assembled during their lifetimes.		
ASSESSMENTS & BENCHMARKS (include time frame)	In FY 21, acquire and begin use of sophisticated prospect tracking and undertake "Wealth Screening"; provide routine stewardship reports to those sources funding endowments and other major gifts.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Copies of promotional mailings regarding planned giving informational meetings, etc.; completed sales contract/product delivery regarding prospect tracking software, updated contact list, stewardship reports		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy, Database/Research Officer (proposed)		
ESTIMATED COSTS	Wealth Screening: \$1,500 (\$1500 for one of three fiscal years)		
STATUS	TBD		



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ACTION STEP 6 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Implement informational sessions regarding planned giving advantages and incorporate information into all outgoing mailings, e-newsletters, thank you letters, and website.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While gifts of every level, received at any time, are important to the University, it is a practical general fact that the higher the amount of the gift, the more magnified its impact. Meantime, 'planned giving' (bequests, annuities, etc.) provides a pipeline of future gift income, and often are attractive to donors in part because of charitable gift tax advantages. For many, 'planned giving' vehicles allow donors to provide for an eventual major gift which could not be assembled during their lifetimes.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, hold a planned giving workshop and continue at a minimum of once per fiscal year and beyond. Ensure complete accuracy update of UHC database.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Copies of promotional mailings regarding Planned Giving informational meetings, meeting agenda and minutes, stewardship reports, website postings, database review		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy, Database/Research Officer (proposed)		
ESTIMATED COSTS	Nominal. Refreshments for meetings and promotional material will be needed.		
STATUS	TBD		

<b>Objective 2: To continue to grow unrestricted giving using effective Annual Fund e-, print, and face-to-face techniques</b>			
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Update contact information of all individuals, particularly alumni (capturing emails, physical addresses, phone, employment information, etc.)
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	Like many smaller institutions, UHC is tuition-driven. The majority of its yearly operational budget comes from student tuition. However, student tuition does not, and never will, equal the actual cost of educating a student. Moreso, as much as 90% of our student enrollment typically qualifies for, and is in need of, some type of financial aid or scholarship. The Annual Fund, and the undesignated dollars which it attracts, is required to bridge the gap between what the student pays for her/his education and what it actually costs the University to provide that high-quality education. Therefore, Annual Fund dollars allow for immediate assignment to assist with technology, faculty salaries, tuition support, equipment, and much more. Also, the Annual Fund provides a dependable stream of income to the University's operating budget and permits the seizure of unexpected opportunities, thereby supporting enrollment and quality programs.		
ASSESSMENTS & BENCHMARKS (include time frame)	1) Raise total unrestricted dollars given, and total number of donors, by a minimum of 5% in each of the next three fiscal years; 2) During FY 20, contract for complete accuracy of UHC database; 3) Stage Fall e-solicitation by mid-November of each of the next three fiscal years; 4) Stage focused asks of Board of Trustees, Ambassadors, and past donors by 12/15 of each of the next three fiscal years; 5) Raise "GiveNOLA Day" total dollars given and the total number of donors, a minimum of 10% each of the next fiscal years.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Proof of vendor delivery of database updating, copies of all solicitations, dollar results as provided/confirmed by Finance Office		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President of Philanthropy, Director of Alumni and Parent Relations, Database/Research Officer (proposed), Director of Marketing and Communications		
ESTIMATED COSTS	Design and photographic services are routinely in the Philanthropy budget.		
STATUS	TBD		

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ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Work with Marketing/Communications to define and articulate "the case" for the Annual Fund.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	Like many smaller institutions, UHC is tuition-driven. The majority of its yearly operational budget comes from student tuition. However, student tuition does not, and never will, equal the actual cost of educating a student. Moreso, as much as 90% of our student enrollment typically qualifies for, and is in need of, some type of financial aid or scholarship. The Annual Fund--and the undesignated dollars which it attracts--is required to bridge the gap between what the student pays for her/his education and what it actually costs the University to provide that high-quality education. Therefore, Annual Fund dollars allow for immediate assignment to assist with technology, faculty salaries, tuition support, equipment, and much more. Also, the Annual Fund provides a dependable stream of income to the University's operating budget and permits the seizure of unexpected opportunities.		
ASSESSMENTS & BENCHMARKS (include time frame)	1) Raise total unrestricted dollars given, and total number of donors, by a minimum of 5% in each of the next three fiscal years; 2) During FY 20, contract for complete accuracy of UHC database; 3) Stage Fall e-solicitation by mid-November of each of the next three fiscal years; 4) Stage focused asks of Board of Trustees, Ambassadors, and past donors by 12/15 of each of the next three fiscal years; 5) Raise "GiveNOLA Day" total dollars given and the total number of donors, a minimum of 10% each of the next fiscal years.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Proof of vendor delivery of database updating; copies of all solicitations, dollar results as provided/confirmed by the Finance Office		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President of Philanthropy, Director of Alumni and Parent Relations, Database/Research Officer (proposed), Director of Marketing and Communications		
ESTIMATED COSTS	Accuracy update of all e-mails, once-per-fiscal year = \$1,000 (\$3,000 for next three FYs); design/photographic services routinely in Philanthropy budget		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Draw from "wealth screening" as one means of identifying who among "our universe" may have the capacity for a minimum annual \$1,000-\$5,000 outright gift.
	<input type="checkbox"/>	M	
	<input checked="" type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	Like many smaller institutions, UHC is tuition-driven. The majority of its yearly operational budget comes from student tuition. However, student tuition does not, and never will, equal the actual cost of educating a student. Moreso, as much as 90% of our student enrollment typically qualifies for, and is in need of, some type of financial aid or scholarship. The Annual Fund--and the undesignated dollars which it attracts--is required to bridge the gap between what the student pays for her/his education and what it actually costs the University to provide that high-quality education. Therefore, Annual Fund dollars allow for immediate assignment to assist with technology, faculty salaries, tuition support, equipment, and much more. Also, the Annual Fund provides a dependable stream of income to the University's operating budget and permits the seizure of unexpected opportunities.		
ASSESSMENTS & BENCHMARKS (include time frame)	1) Raise total unrestricted dollars given, and total number of donors, by a minimum of 5% in each of the next three fiscal years; 2) During FY 20, contract for complete accuracy of UHC database; 3) Stage Fall e-solicitation by mid-November of each of the next three fiscal years; 4) Stage focused asks of Board of Trustees, Ambassadors, and past donors by 12/15 of each of the next three fiscal years; 5) Raise "GiveNOLA Day" total dollars given and the total number of donors, a minimum of 10% each of the next three fiscal years.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Proof of vendor delivery of database updating, copies of all solicitations, dollar results as provided/confirmed by the Finance Office		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President of Philanthropy, Director of Alumni and Parent Relations, Database/Research Officer (proposed)		
ESTIMATED COSTS	Accuracy update of all e-mails, once-per-fiscal year = \$1,000 (\$3,000 for next three FYs); design/photographic services routinely in Philanthropy budget		
STATUS	TBD		

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ACTION STEP 4 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Based on contact data and available person power, solicit alumni and others for unrestricted Annual Fund donations on behalf of their respective departments, schools, or colleges.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	Like many smaller institutions, UHC is tuition-driven. The majority of its yearly operational budget comes from student tuition. However, student tuition does not, and never will, equal the actual cost of educating a student. Moreso, as much as 90% of our student enrollment typically qualifies for, and is in need of, some type of financial aid or scholarship. The Annual Fund--and the undesignated dollars which it attracts--is required to bridge the gap between what the student pays for her/his education and what it actually costs the University to provide that high-quality education. Therefore, Annual Fund dollars allow for immediate assignment to assist with technology, faculty salaries, tuition support, equipment, and much more. Also, the Annual Fund provides a dependable stream of income to the University's operating budget and permits the seizure of unexpected opportunities.		
ASSESSMENTS & BENCHMARKS (include time frame)	1) Raise total unrestricted dollars given, and total number of donors, by a minimum of 5% in each of the next three fiscal years; 2) During FY 20, contract for complete accuracy of UHC database; 3) Stage Fall e-solicitation by mid-November of each of the next three fiscal years; 4) Stage focused asks of Board of Trustees, Ambassadors, and past donors by 12/15 of each of the next three fiscal years; 5) Raise "GiveNOLA Day" total dollars given and the total number of donors, a minimum of 10% each of the next fiscal years.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Proof of vendor delivery of database updating, copies of all solicitations, financial results as provided/confirmed by the Finance Office		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President of Philanthropy, Director of Alumni and Parent Relations, Database/Research Officer (proposed)		
ESTIMATED COSTS	Accuracy update of all e-mails, once-per-fiscal year = \$1,000 (\$3,000 for next three FYs); design/photographic services routinely in Philanthropy budget		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 5 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Continue to harness UHC's participation in "GiveNOLA Day" as the Spring appeal for unrestricted by way of the Annual Fund, soliciting all individuals with a common appeal, regardless of their school/college/department.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	Like many smaller institutions, UHC is tuition-driven. The majority of its yearly operational budget comes from student tuition. However, student tuition does not, and never will, equal the actual cost of educating a student. Moreso, as much as 90% of our student enrollment typically qualifies for, and is in need of, some type of financial aid or scholarship. The Annual Fund--and the undesignated dollars which it attracts--is required to bridge the gap between what the student pays for her/his education and what it actually costs the University to provide that high-quality education. Therefore, Annual Fund dollars allow for immediate assignment to assist with technology, faculty salaries, tuition support, equipment, and much more. Also, the Annual Fund provides a dependable stream of income to the University's operating budget and permits the seizure of unexpected opportunities.		
ASSESSMENTS & BENCHMARKS (include time frame)	1) Raise total unrestricted dollars given, and total number of donors, by a minimum of 5% in each of the next three fiscal years; 2. During FY 20, contract for complete accuracy of UHC database; 3) Stage Fall e-solicitation by mid-November of each of the next three fiscal years; 4) Stage focused asks of Board of Trustees, Ambassadors, and past donors by 12/15 of each of the next three fiscal years; 5) Raise "GiveNOLA Day" total dollars given and the total number of donors, a minimum of 10% each of the next fiscal years.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Proof of vendor delivery of database updating; copies of all solicitations; financial results as provided/confirmed by Finance Office.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President of Philanthropy, Director of Alumni and Parent Relations, Database/Research Officer (proposed), Director of Marketing and Communications		
ESTIMATED COSTS	Accuracy update of all e-mails, once-per-fiscal year = \$1,000 (\$3,000 for next three FYs); design/photographic services routinely in Philanthropy budget		
STATUS	TBD		

<b>Objective 3: To continue to grow results from current signature special events (and design new ones, as appropriate) in support of selected restricted and unrestricted giving.</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Increase attendance for, and net profits from, UHC Prayer Breakfast, Spes Unica, Ditta Scholarship Evening, Father Chambers Event, UHC Golf Tournament, stewardship luncheons and dinners, and consider reinstatement of Excelsior Gala.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	Prayer Breakfast each November; Spes Unica each March (or April); Ditta Scholarship evening during Fall or Spring (NOTE: It may be decided to stage this in alternate years). Fr. Chambers event typically each January; UHC Golf Tournament either during Fall or Spring, each FY; Stewardship lunch/dinners generally spaced throughout the year with no set schedule.		
RATIONALE (relationship to enrollment, quality programs)	Advancement professionals regard events as far more than one-time social gatherings. They are critical to providing an opportunity to showcase our mission and programs, by way of student and faculty involvement, featured speakers, distributed publications, etc. In addition to reinforcing awareness of our mission amongst those already involved in our life, events are a means of attracting engaging newcomers in support of enrollment and quality programs.		
ASSESSMENTS & BENCHMARKS (include time frame)	Raise a minimum of \$20,000, and attract at least 125 attendees to the Fall 2019 Prayer Breakfast. In subsequent fiscal years, jump by a minimum of 10%. For Spes Unica, raise a minimum of \$20,000 and attract at least 150 attendees to the Spring 2020 event. Aim for attendance of 60 at the January 2020 Fr. Chambers Tribute and aim for attendance of 125 at the 2019-20 Ditta Scholarship evening.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Results of attendance and profits as reported to Cabinet and Board of Trustees, and recited in respective minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Executive Vice President, Vice President for Philanthropy, Executive Assistant to the Executive Vice President, and other team members as needed		
ESTIMATED COSTS	Recurring "seed money" (from prior year's events) for selected events; plaques and presentation awards, particularly Spes Unica and Prayer Breakfast; finances covered by Philanthropy budget		
STATUS	TBD		

Alumni & Parent Relations						
<b>Goal 3: Between FY 20 and FY 23, the University of Holy Cross shall continue to nurture, develop and serve its 5000+ alumni in support of UHC aspirations including enrollment and gift-income growth.</b>						
<b>Objective 1: To continue to strategically design, implement, and evaluate current alumni/parent events</b>						
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px; text-align: center;">H</td> <td rowspan="3" style="padding: 5px;">Evaluate the format and attendance of events we currently have and build upon them.</td> </tr> <tr> <td style="text-align: center;">M</td> </tr> <tr> <td style="text-align: center;">L</td> </tr> </table>	H	Evaluate the format and attendance of events we currently have and build upon them.	M	L
H	Evaluate the format and attendance of events we currently have and build upon them.					
M						
L						
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023					
RATIONALE (relationship to enrollment, quality programs)	In Alumni Relations, one of the main objectives is involvement in support of enrollment and quality programs. Involvement leads to engagement and engagement leads to support in a variety of ways. One of the main ways we have that involves people is our events. Once people are engaged at these events, it then leads to support of our not only our events but the University as a whole. The culmination of the cycle is the alumni who will one day be awarded Alumna/Alumnus of the year.					
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, begin planning and implementing new events with special emphasis on reinstating the Excelsior Gala; update the alumni page on the website and implement yearly plan to manage this page.					
DOCUMENTATION (deliverables; proof that benchmark achieved)	Alumni contact and event reports from 2019-2023					
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President for Philanthropy					
ESTIMATED COSTS	\$5,000 in budget towards Excelsior Gala					
STATUS	TBD					



Focus Area 7: Institutional Advancement

ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Create, evaluate, and strengthen events that are engaging and inclusive and combine student/alumni activities and events on and off campus.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	In Alumni Relations, one of the main objectives is involvement in support of enrollment and quality programs. Involvement leads to engagement and engagement leads to support in a variety of ways. One of the main ways we have that involves people is our events. Once people are engaged at these events, it then leads to support of our not only our events but the University as a whole. The culmination of the cycle is the alumni who will one day be awarded Alumna/Alumnus of the year.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, begin planning and implementing new events with special emphasis on reinstating the Excelsior Gala; update the alumni page on the website and implement yearly plan to manage this page.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Alumni contact and event reports from 2019-2023		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President for Philanthropy		
ESTIMATED COSTS	\$5,000 in budget towards Excelsior Gala		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Implement Alumna & Alumnus of the Year Awards.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	In Alumni Relations, one of the main objectives is involvement in support of enrollment and quality programs. Involvement leads to engagement and engagement leads to support in a variety of ways. One of the main ways we have that involves people is our events. Once people are engaged at these events, it then leads to support of our not only our events but the University as a whole. The culmination of the cycle is the alumni who will one day be awarded Alumna/Alumnus of the year.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, begin planning and implementing new events with special emphasis on reinstating the Excelsior Gala; update the alumni page on the website and implement yearly plan to manage this page.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Alumni contact and event reports from 2019-2023		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President for Philanthropy		
ESTIMATED COSTS	\$5,000 in budget towards Excelsior Gala		
STATUS	TBD		

<b>Objective 2: To continue to grow and involve the Alumni Board</b>			
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Build upon the alumni group we currently have.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While having alumni and friends involved is important, it is almost more important that we have an Alumni Board that represents the University and its mission as it supports enrollment and quality programs. The Alumni Board is the uniting bridge between alumni and the University. The goal of the board is to have alumni from every discipline, race, and gender representing the University's diverse background and values.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, add two new alumni board members, and at least one new one every year beyond that, until FY 23.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Board growth reports, Board Minutes, Alumni Board meeting agendum (twice per semester)		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President for Philanthropy		
ESTIMATED COSTS	TBD		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Create sub-committees for Alumni Board for special responsibilities.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019-June 30, 2023		
RATIONALE (relationship to enrollment, quality programs)	While having alumni and friends involved is important, it is almost more important that we have an Alumni Board that represents the University and its mission as it supports enrollment and quality programs. The Alumni Board is the uniting bridge between alumni and the University. The goal of the board is to have alumni from every discipline, race, and gender representing the University's diverse background and values.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, add new subcommittees as needed until 2023.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Board growth reports, Board Minutes, Alumni Board meetings twice a semester.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	None		
STATUS	TBD		

<b>Objective 3: To increase our knowledge base of alumni and parents</b>			
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Meet with alumni that are connected to their classmates and build upon those relationships.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	In Alumni Relations, we rely heavily on information to be a vital asset in our communication to our alumni. In recent years, this has been an issue. We rely on this information to contact and invite alumni and friends to events and general visits. With the growth of the University and its new residence hall, we must begin capturing parents information to maintain contact as well.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, implement information-capturing opportunities for both alumni and parents at every event and continue this practice moving forward (plan at least two "Dinner With 12 Students" events).		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Alumni updated informational reports, parent informational report, event(s) attendee lists		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	Parent Relations budget \$5000		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Increase capturing information gathering opportunities at every event and update contact information.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	In Alumni Relations, we rely heavily on information to be a vital asset in our communication to our alumni. In recent years, this has been an issue. We rely on this information to contact and invite alumni and friends to events and general visits. With the growth of the University and its new residence hall, we must begin capturing parents information to maintain contact as well.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, implement information-capturing opportunities for both alumni and parents at every event and continue this practice moving forward (plan at least 2 "Dinner With 12 Students" events).		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Alumni updated informational reports, parent informational report, event(s) attendee lists		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	Parent Relations budget \$5000		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Implement new parent receptions and volunteer opportunities.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	In Alumni Relations, we rely heavily on information to be a vital asset in our communication to our alumni. In recent years, this has been an issue. We rely on this information to contact and invite alumni and friends to events and general visits. With the growth of the University and its new residence hall, we must begin capturing parents information to maintain contact as well.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, implement information-capturing opportunities for both alumni and parents at every event and continue this practice moving forward.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Alumni updated informational reports, parent informational report, event(s) attendee lists.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	Parent Relations budget \$5000		
STATUS	TBD		

<b>Objective 4: To develop a Career Services program for students and alumni</b>			
ACTION STEP 1 (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Establish a formal Career Center within the Residence Hall.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	The University is for education. This education is for the students we serve at the University. Often the reason for the students' education is for a job in the real world so they can better serve our community as a whole. This is where Career Services is a vital part to students and alumni. This is where we have a opportunity to connect our students and alumni with business leaders and other alumni in our city. Career Services should provide an environment conducive for supporting students and alumni to better serve the community.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, create a Career Center on campus, launch Career Fair that will continue on an annual basis, and build an attractive Career Services page on our website.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Job reports, business connection reports, webpage		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy, IT Department		
ESTIMATED COSTS	\$5,000 for Career Center		
STATUS	TBD		



Focus Area 7: Institutional Advancement

ACTION STEP 2 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Develop and implement a mentoring program for students and alumni.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	The University is for education. This education is for the students we serve at the University. Often the reason for the students' education is for a job in the real world so they can better serve our community as a whole. This is where Career Services is a vital part to students and alumni. This is where we have a opportunity to connect our students and alumni with business leaders and other alumni in our city. Career Services should provide an environment conducive for supporting students and alumni to better serve the community.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, create a Career Center on campus and create an attractive Career Services page on our website. During FY 21, create Career Fair that will continue on an annual basis		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Announcements, agendum, meeting minutes, news stories		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	\$5,000 for Career Center		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 3 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Develop important events such as Career Fairs and resume-writing workshops.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	The University is for education. This education is for the students we serve at the University. Often the reason for the students' education is for a job in the real world so they can better serve our community as a whole. This is where Career Services is a vital part to students and alumni. This is where we have a opportunity to connect our students and alumni with business leaders and other alumni in our city. Career Services should provide an environment conducive for supporting students and alumni to better serve the community.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, create a Career Center on campus and create an attractive Career Services page on our website. During FY 21, create Career Fair that will continue on an annual basis		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Job reports, business connection reports.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	\$5,000 for Career Center		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 4 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Continue to build strong relationships with businesses and organizations.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	The University is for education. This education is for the students we serve at the University. Often the reason for the students' education is for a job in the real world so they can better serve our community as a whole. This is where Career Services is a vital part to students and alumni. This is where we have a opportunity to connect our students and alumni with business leaders and other alumni in our city. Career Services should provide an environment conducive for supporting students and alumni to better serve the community.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, create a Career Center on campus and create an attractive Career Services page on our website. During FY 21, create Career Fair that will continue on an annual basis		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Job reports, business connection reports		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	\$5,000 for Career Center		
STATUS	TBD		

Focus Area 7: Institutional Advancement

ACTION STEP 5 (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Acquire Career Services software system.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	July 1, 2019- June 30th, 2023		
RATIONALE (relationship to enrollment, quality programs)	The University is for education. This education is for the students we serve at the University. Often the reason for the students' education is for a job in the real world so they can better serve our community as a whole. This is where Career Services is a vital part to students and alumni. This is where we have a opportunity to connect our students and alumni with business leaders and other alumni in our city. Career Services should provide an environment conducive for supporting students and alumni to better serve the community.		
ASSESSMENTS & BENCHMARKS (include time frame)	During FY 20, create a Career Center on campus and create an attractive Career Services page on our website. During FY 21, create Career Fair that will continue on an annual basis		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Job reports, business connection reports		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Alumni & Parent Relations, Executive Vice President, Vice President of Philanthropy		
ESTIMATED COSTS	\$5,000 for Career Center		
STATUS	TBD		

Marketing & Communications			
<b>Goal 4: Increase the University's brand awareness and brand messaging.</b>			
<b>Objective 1: To build external awareness of UHC within the community</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input checked="" type="checkbox"/>	H	Employ effective multimodal advertising using a consistent logo, brand colors, messaging, and voice.
	<input type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	Ongoing throughout the year (currently contracted with Rupp Marketing through June 2019, then will extend).		
RATIONALE (relationship to enrollment, quality programs)	Brand awareness and brand messaging work in tandem to build a positive reputation and voice, thus helping end users recognize UHC and take note of our offerings. Brand recognition benefits the University as a whole and has a direct relationship to enrollment.		
ASSESSMENTS & BENCHMARKS (include time frame)	Monthly engagement metrics for all web-related endeavors, focus groups, Administrative Institutional Effectiveness Plans		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Monthly engagement metrics for all web-related endeavors, focus groups, and Administrative Institutional Effectiveness Plans accompanied by documentation of multi-modal advertising (i.e., print, digital (web), outdoor (billboards), and tv commercials). Print ads include higher education supplements and relevant issues/publications to UHC. Digital (web) advertising includes social media ads on Facebook and Instagram, Google Display and Video ads, and Search Engine Marketing (SEM) via Google with text ads and keywords. Outdoor billboards will be either print or digital in locations deemed relevant by Enrollment Management for recruitment purposes. TV commercials will be featured on local stations and Netflix, with placement determined by our media partners.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Marketing and Communications with oversight by Executive Vice President, Vice President for Enrollment Management		
ESTIMATED COSTS	\$300,000 for all advertising efforts annually.		

<b>Objective 2: To increase internal brand awareness and create UHC brand stewards</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	The Communications email account (communications@uhcno.edu) will issue a monthly "Brand Digest" email to all students, faculty, and staff with in depth topics.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	In process and ongoing.		
RATIONALE (relationship to enrollment, quality programs)	As members of the UHC community, we each have the opportunity to promote our University and educate others on our mission, values, and programs. It is important that all faculty, staff, and students understand the brand platform to increase "word of mouth" referrals for new students and outside brand awareness in support of enrollment.		
ASSESSMENTS & BENCHMARKS (include time frame)	Quarterly reviews of Communications email account (communications@uhcno.edu), archived "Brand Digest" emails, reader surveys		
DOCUMENTATION (deliverables; proof that benchmark achieved)	All campus members will receive the monthly email throughout the academic year. A digital survey will be issued to gauge retention of the Brand Digest content.		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Marketing and Communications with oversight by the Executive Vice President		

<b>Objective 3: To enhance electronic communications in support of brand awareness and brand messaging</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Hire a full-time Communications Assistant to manage social media platforms and the UHC website such that they have accurate content with consistent brand voice and messaging. Expand content to include short fact posts, programmatic promotions, overall branding posts, and links to web stories. Maintain a full inventory of each active webpage. Establish a review schedule to ensure content is correct and refreshed periodically.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	AY22/23 through AY 28/29		
RATIONALE (relationship to enrollment, quality programs)	Many prospective students and community members look to UHC social media vehicles and website for information. We must provide consistent and accurate content to engage our users and solidify our standing as a University, thereby promoting enrollment.		
ASSESSMENTS & BENCHMARKS (include time frame)	A content inventory and accompanying update schedule will be created in AY22/23 and reviewed quarterly throughout the strategic plan.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Content inventory and update schedule reviews, employee evaluations, Administrative Institutional Effectiveness Plans		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Marketing and Communications, Communications Assistant (Proposed)		
ESTIMATED COSTS	Social media content boosts (\$3,000 per year x 6 years = \$18,000) plus Communications Assistant (\$45,000 per year plus \$9,000 benefits x 6 years = \$324,000). Total cost = \$342,000.		

<b>Goal 5: Streamline communication flow to prospective students in support of Enrollment Management.</b>			
<b>Objective 1: To map out communication touchpoints to be used by admissions counselors</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Establish a schedule of touchpoints using Salesforce as an aid to effective communications by admissions counselors with prospective students.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	In process; completion targeted for June 2019		
RATIONALE (relationship to enrollment, quality programs)	Admissions counselors are the main point of contact between prospective students for UHC. With consistent communication touchpoints, communication between counselors and prospective students will flourish and thus promote increased enrollment.		
ASSESSMENTS & BENCHMARKS (include time frame)	Review of Excel document to be completed by the end of June 2019 that identifies each communication touchpoint and has the capacity to record the type of communication that will take place and the date upon which it occurred (# of days after first contact).		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Excel document, communication logs, meeting minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Marketing and Communications with oversight by Vice President for Enrollment Management		
ESTIMATED COSTS	N/A		



<b>Objective 2: To write and design content for communication touchpoints to be used by admissions counselors</b>			
ACTION STEP (priority H=High, M=Moderate, L=Low)	<input type="checkbox"/>	H	Building upon established touchpoints, create and employ a specific message and imagery that is consistent with our brand platform and utilizes our brand voice.
	<input checked="" type="checkbox"/>	M	
	<input type="checkbox"/>	L	
TIME FRAME (anticipated start/ estimated completion)	June to December 2019 and then on-going through AY 28/29		
RATIONALE (relationship to enrollment, quality programs)	Admissions counselors are the main point of contact between prospective students for UHC. With clear and consistent messaging, communication between counselors and prospective students will flourish and thus promote increased enrollment.		
ASSESSMENTS & BENCHMARKS (include time frame)	Review of Excel document, to be completed by the end of the 2019 Fall Semester, that identifies each communication touchpoint with messaging and imagery appropriate for the type of communication that will take place, including the dates upon which it will occur (# of days after first contact). Documentation of usage thereafter through AY 28/29.		
DOCUMENTATION (deliverables; proof that benchmark achieved)	Excel document, communication logs, meeting minutes		
PERSON(S) RESPONSIBLE FOR IMPLEMENTATION	Director of Marketing and Communications with oversight by the Vice President for Enrollment Management		
ESTIMATED COSTS	TBD. Depending on the skills of the proposed new hire in Enrollment Management (see Goal 4, Objective 3 above), we may need to employ a Salesforce representative to set up the touchpoints. There will be no cost for messaging or imagery creation since it will be done by the Director of Marketing and Communications.		