



Advancement
UtahStateUniversity



UNIVERSITY ADVANCEMENT
STRATEGIC ROAD MAP





1 2 3

This strategic road map outlines three pillars centered around various constituencies that guide how University Advancement strategically invests its time and resources into elevating Utah State University's mission through philanthropy, engagement, and collaboration.

Deliver an Exceptional Gift and Engagement Experience

University Advancement cultivates Utah State University's leading advocates, advisors, and investors through exceptional gift and engagement experiences.



OUTCOMES

1. Sustain \$75-100 million annual fundraising
2. Engage alumni through philanthropy, volunteer opportunities, experiences, and communications (CASE AEM survey)
3. Amplify mentoring opportunities, programs, and career support for graduates of the last decade (GOLD)
4. Enact new technologies and data-driven processes to heighten ROI and widen philanthropic support and engagement
5. Share gift impact (demonstrating philanthropic ROI) through events and communications
6. Align USU boards and empower board members to be leading advocates, advisors, and investors to help the university accomplish its goals and achieve its vision
7. Ensure Advancement experiences are welcoming to all



1. Strengthen purpose-driven alumni and donor engagement

USU Advancement maximizes resources by investing in purposeful interactions and communications, and concentrating engagement opportunities in focused areas.

Strategies

- Grow Alumni Chapter engagement
- Develop a program to mentor young alumni
- Create a strategic plan to maximize efficiency of Advancement travel
- Invest in digital advertising to segmented audiences
- Leverage Aggie Network to build communication with professional alumni and stakeholders
- Provide a network of support to alumni throughout their lives
- Implement texting services
- Incorporate use of data mining pre- and post-event
- Unite student calling with events
- Capitalize on student affinity groups to supplement alumni engagement opportunities



2. Effectively retain and move donors through the giving continuum

USU Advancement utilizes engagement opportunities, data analysis, and relationship building to grow affinity and link donor passions with university impact priorities.

Strategies

- Heighten ROI in major gift processes
- Generate individual donor stewardship plans
- Assist alumni in connecting their network to expand corporation and foundation giving
- Augment Old Main Society experiences
- Streamline internal operations
- Join corporation and foundation interests with university priorities to create mutual benefit
- Perform strategic data analysis to target philanthropic opportunities
- Customize alumni data and research for better outreach
- Boost donor retention and progression to major gift level
- Bridge gap between mid- and major-level donors by aligning giving societies and engagement
- Elevate donor experience through board engagement and experiential opportunities





3. Cultivate pathways to personalize donor appeals and streamline the donation process

USU Advancement is continually implementing the most innovative tools to improve and individualize the donor experience.

Strategies

- Utilize giving platforms and tools to simplify the donation process
- Segment annual giving solicitations and personalize messaging
- Increase solicitation around events
- Improve giving history transparency
- Implement new CRM to improve communication and engagement as students transition to alumni
- Optimize the web experience for external constituents
- Enhance ways donation process is communicated to alumni and donors
- Establish external partnerships to manage complex gifts



4. Enrich the donor volunteer experience

USU Advancement leverages engagement activities to maximize opportunities for donors to contribute their expertise in service to the university.

Strategies

- Link alumni expertise with student and faculty engagement opportunities
- Offer lifetime value proposition from recent grad through post-board experience
- Deliver exceptional board experience and clearly communicate board roles
- Recruit Aggie Family for mentorship and networking opportunities
- Capture and track alumni/student engagement experiences across the statewide system
- Initiate consistent board service recognition and show impact
- Solicit input from donors on quality engagement
- Give board members an opportunity to recognize top donors



PILLAR 2

Serve as a Trusted Partner in Philanthropy

University Advancement serves all internal stakeholders with integrity and transparency, and strives to strengthen unity through collaboration.



OUTCOMES

1. Leverage campaign to ensure units achieve philanthropic priorities and USU accomplishes “Aggie Action 2028” strategic plan outcomes
2. Position USU Advancement as a trusted resource in policies, procedures, and services pertaining to governance, philanthropy, donors, and engagement practices
3. Construct pathways for all internal stakeholders to maximize resources and expertise of Advancement services
4. Enrich internal partnerships across the statewide system to maximize resources and improve ROI

OBJECTIVES



1. Promote the culture of collaboration and service of shared goals across the statewide system

USU Advancement enhances “One USU” philanthropy and engagement processes by sharing assets and unifying efforts and messaging across all units of the university.

Strategies

- Create open lines of communication between units
- Streamline Alumni Chapter procedures
- Align board processes and trainings
- Unify approach to engagement opportunities
- Identify and solidify internal partnerships to maximize impact and standardize processes and procedures
 - Career Resources, Campus Store, Admissions, UMAC, Controller’s Office
- Introduce a clear, tiered structure of available Advancement services



2. Provide Advancement support and resources to USU partners statewide

USU Advancement, as a central unit of the university, strives to assist all internal partners in understanding and utilizing Advancement services, fundraising knowledge, and stakeholder engagement expertise.

Strategies

- Organize bi-annual AVP/Advancement coordination meetings
- Initiate partner onboarding program for new USU leaders and key administrative personnel
- Capitalize on already established meetings to inform constituents about Advancement services and strategies
- Launch an annual fundraising board strategic workshop for academic leaders





3. Develop and implement industry-leading fundraising policies and procedures

USU Advancement works with internal partners to safeguard gift compliance and transparency, guarantee funding follows donor intent, and make sure gift information is effectively disseminated.

Strategies

- Build a searchable hub for Advancement resources
- Determine workflow management platform/person
- Form partnerships with university procedural committees to streamline processes, communication, and transparency between groups
- Support and participate in university initiatives and working groups to improve effectiveness and efficiency of university policies, procedures, and approvals
- Strengthen Advancement's ability to accurately project feasibility of capital fundraising projects
- Maintain open communication and collaboration with partners



PILLAR 3

Build a Culture of Excellence

Aspiring to excellence in our work and results, University Advancement champions initiatives that encourage genuine respect of others and nurture a welcoming team environment.



OUTCOMES

1. Increase staff retention through job satisfaction and career pathing
2. Implement a training program to coach Advancement staff on effective strategies that encourage equity, leadership, and belonging
3. Ensure equity in both leadership engagement opportunities and compensation on par with top quartile of peer institutions
4. Cultivate a work environment that fosters belonging, fulfillment, wellness, and collaboration and allows employees to take ownership of their duties and expertise

OBJECTIVES



1. Create an equitable and inclusive environment that is welcoming for all

USU Advancement aspires to provide a space where all team members feel personally and professionally respected and valued.

Strategies

- Establish a recruiting process that is open to all candidates so that everyone can see themselves as a part of the Advancement team
- Nurture an atmosphere where all voices are valued and given opportunity to be heard
- Promote equity and leadership growth for all Advancement employees



2. Launch an onboarding and professional development program across all units in Advancement

USU Advancement is committed to creating a cohesive, clear, and comprehensive process for welcoming and retaining team members.

Strategies

- Organize a cohort of new employees to share experiences and give feedback
- Initiate a new employee welcome experience that is consistent across Advancement
- Standardize onboarding to highlight all areas within Advancement
- Provide senior leaders advanced training in areas around decision making, board organization, and effective leadership strategies



3. Generate a fair and equitable performance management system

USU Advancement empowers accountability and rewards accomplishments and competencies by investing in employee success.

Strategies

- Institute regular reviews to communicate career pathing, leadership development, and progress on performance
- Train leaders to communicate expectations on metrics and competencies
- Improve performance platforms to streamline processes
- Recognize and incentivize exceptional performance across Advancement team



4. Champion a “One Advancement” team

USU Advancement inspires collaboration, respect, enjoyment, and belonging among all team members through engaging activities, recognition, and showing appreciation.

Strategies

- Identify and arrange interactive Advancement social activities
- Customize and enhance recognition opportunities
- Elevate annual retreat to be a meaningful and engaging experience





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