



SHAPE THE FUTURE OF THE UNIVERSITY

Alumni, donors and staff want a compelling path to greater success for the University that is mission-driven to broadly benefit society and not just the needs of the institution.

1. Create a **core value proposition and identity for Advancement** that links the strength of Queen's to the quality of our alumni community and their investments of time and philanthropy.
2. Partner in a **dynamic planning, and priority-setting process** to integrate faculty priorities with University wide strategic directions.
3. Focus marketing to align with **strategic mandate of the leadership of the University:** in programs, projects, and people.
4. Prioritize **key strategic priorities** that have the greatest support for the vision of Queen's leadership, for philanthropy, and for impact on society.
5. Create both **research and teaching endowed and limited-term chairs** to attract and retain outstanding leaders in academia.
6. Communicate the relevance and importance of **leading and focused research** as central to the national and international reputation of Queen's.
7. Define and articulate the **unique Queen's student experience** and how this highly valued aspect of the Queen's community will evolve.
8. Promote the opportunity for **legacy giving and endowment building**, in the context of the intergenerational wealth transfer that is happening broadly in society.
9. Promote the location and setting of Queen's as a strategic asset.



GROW KEY PROGRAMS: Major, Principal and Planned Gift Fundraising

Philanthropy fuels the advancement of Queen's as well as our capacities to respond to changing challenges. Queen's must build fundraising muscle to achieve our goals whether we are in or out of campaign.

1. Build the fundraising program to **sustainably deliver revenue** of 10% relative to core government operating funding for priority initiatives.
2. Develop a **permanent and ongoing fundraising** operation that will focus on annual major gift fundraising goals more than multi-year campaign objectives.
3. Plan and execute a **new fundraising campaign** that offers the chance to present a sense of strategic direction and leadership in key areas to the community.
4. Focus university leaders, volunteers and dedicated staff on **principal gift philanthropy** (gifts of \$5,000,000+) to generate 70% of annual fundraising results from gifts of \$1,000,000 and higher.
5. Develop a **more aggressive approach to asking** based on wealth capacity and personal interests as well as a track record of involvement.
6. Invest in the **growth of the planned-giving program** and tie personal legacy to the endowment building agenda for growing numbers of older alumni.
7. **Focus performance metrics** on fewer, more strategic measures including progress on major donor philanthropy, donor retention (stewardship) and new donors (acquisition).
8. **Systematically resolicit** current donors on pledges for renewals and upgrades.
9. Improve **efficiency and transparency of prospect assignment**, including time-limited assignments dependent on action and progress.



DEVELOP A HIGH-PERFORMING ADVANCEMENT CULTURE

The Advancement unit is a vital link between the world of academia and the alumni constituency. The people in Advancement need both an internal (academic community) and external (alumni diaspora) perspective as well as a commitment to the highest standards of professionalism and client (alumni and donors) experience.

1. Develop a culture that allows for **greater leverage and productivity** to:
 - Improve managerial integration and coordination
 - **Value all alumni**, not just those who are engaged / giving
 - **Build a robust dialogue** with the Queen's community at all levels
 - **Increase assertiveness and ambition in solicitation**
 - Encourage educated **risk-taking**, and innovation
 - **Reduce bureaucracy** and streamline decision making
 - Demonstrate our **impact, both internally and to the broader community**
2. **Passionate and ambitious Advancement people** are core to driving the success of the enterprise. Focus hiring on champions for Queen's at all levels.
3. Migrate personal performance evaluation to a **greater emphasis on team achievement** rather than personal metrics.
4. Create expectations for **collaboration within the Office of Advancement and with campus partners**.
5. Hold team managers **accountable for results and the performance of their teams** with clear performance metrics and goals.
6. Ensure **investments in programming innovation** throughout the advancement enterprise.
7. Invest in a **dedicated talent-management function** focused on recruitment, on-boarding, training, coaching, mentoring, and performance management.
8. **Increase use of business analytics** to improve all aspects of business decision making and operational effectiveness.
9. **Align compensation structures** and career paths for staff in university-wide operations with faculty-based advancement functions.



GROW KEY PROGRAMS: Communications

The Queen's Advancement communications program should be anchored in the idea that the Queen's community – especially our alumni – is an essential partner in purpose and mission and shares mutual interests and obligations.

1. Focus communications on the **positive impact of Queen's**, the Queen's community (especially donors and alumni) and a Queen's education on the world.
2. Organize and plan a multi-channel framework for **timely, relevant, and targeted communications** to engage stakeholders and expand audiences.
3. Develop **lead-generation capacity and strategy** through marketing and events.
4. Define and **coordinate brand and messaging** in collaboration with campus partners.
5. **Align donor communications** fully with university key messaging and personalize communications wherever possible at all donor levels.
6. Expand **content creation capacity** as part of an expanded digital co-creation strategy to meet the needs of digitally engaged audiences.
7. Consider **brand perception and value** at the heart of all communications, marketing, events, and donor relations activities, including any future campaigns.
8. Integrate strategic events into the communications plan to **deliver key messages and expand experiential opportunities** for stakeholders.
9. Ensure all philanthropic **communications are donor-centric**: "good things happen at Queen's because people like you made it happen".
10. Integrate the **impact of estate giving and endowment** contributions into the communications plan.
11. Provide a **customized approach to reports** and updates that are highly focused on impact for all donors over \$100,000.
12. **Integrate gift renewal and upgrade** into donor communications.



GROW KEY PROGRAMS: Alumni Programming and Annual Giving

Alumni are key assets and differentiators for the University: the alumni community helps define Queen's in many ways and is a competitive advantage relative to other institutions.

1. **Value all alumni**, even those who don't participate in formal ways.
2. **Value every gift**, especially those from new donors.
3. Evolve alumni **engagement to be purposeful** and less events-dependent in this connected world.
4. Develop a **complementary approach to engagement** that gives alumni and donors both the big picture at Queen's as well as their faculty perspective.
5. Grow an **international alumni engagement strategy** that is not location-dependent.
6. Increase investments to support alumni who **self-organize activity** outside of university channels.
7. Focus on **donor acquisition at leadership gift** (\$1,000+) levels to increase cost-effective fundraising and donor loyalty.
8. Grow Leadership annual giving (\$1,000+) and intermediate giving (\$5,000+) through strategies including direct response, and face-to-face engagement.
9. Conduct a **full external review** of alumni programming to align it with stage-of-life needs.
10. Promote **10th anniversary class reunions** around leadership annual giving to create a stream of loyal future major donors.
11. Create a **Toronto Alumni and Annual Fund operation**, to manage our largest cluster of alumni and donors.
12. **Renovate Summerhill or relocate** the Advancement operation to create a facility and a face for a modern advancement business operation.
13. Create a strategy for **engagement of students and young alumni** to increase future value and engagement as alumni and donors.



DEVELOP LEADERSHIP CAPACITIES FOR ADVANCEMENT

Queen's enjoys traditional support from willing alumni and institutional leaders who leverage advancement activities, and for major campaigns. Current and future leaders on campus and in our community need to be developed and supported.

1. Build an **Advancement Council** of exceptional alumni leaders to achieve fundraising goals (whether or not the University is in campaign).
2. Build the **culture of philanthropy** at Queen's by ensuring that all board and committee appointments require a philanthropic commitment as a prerequisite.
3. Share a **clear mandate for securing top gifts** with deans and executive leadership.
4. Build **faculty development committees** around a consistent model, in support of advancement activity.
5. Develop a **central source for resources, coaching** and training for deans and academic leaders involved in advancement.
6. Support faculties to **bring strategic and transformational ideas to life** i.e. concept design, articulation and costing.
7. Develop a formal **Faculty Liaison function** to support the VP Advancement with faculty collaborations, priority setting, prospect assignments, training and accountability.
8. Institute **cost sharing** to create commonality between Advancement and to grow faculty-based initiatives.
9. Follow a **donor-centered and coordinated approach** for prospect assignment, which should only follow a discovery call.



Queen's UNIVERSITY

QUEEN'S ADVANCEMENT, SUPPORTED BY THE OFFICE OF ADVANCEMENT.

"TO FOSTER RELATIONSHIPS THAT ADVANCE QUEEN'S AND CONTRIBUTE TO A BETTER WORLD."