California State University, East Bay
University Advancement Division
STRATEGIC PLAN SUMMARY

September 11, 2007

MISSION

University Advancement
builds a compelling case for choice and support of CSUEB
among all of its constituents
by communicating and advocating
for the university’s distinctive regional position, role, and contributions,
thereby forging relationships and securing commitments
required to advance the institution’s overarching mission and priorities.

VISION

Our vision is to be recognized for a pivotal leadership role in:

• Transforming CSUEB into a regional high-access university of choice and destination campus
• Generating prospective student interest and affinity leading to record high enrollment
• Garnering statewide and national recognition for CSUEB as model of educational innovation
• Building a university endowment that underwrites and ensures the success of the university’s quest for excellence and distinction
• Positioning CSUEB as steward of the region’s future and human capital, worthy of regional business and industry support and collaboration
• Cultivating the university’s most valuable and powerful strategic relationships among business, community, educational, cultural, and political leaders
• Planning and executing history-making, record-breaking comprehensive and capital campaigns

VALUES

With a spirit of professionalism, and in an environment that encourages teamwork and personal growth, University Advancement commits to these values:

• Excellence — We take pride in our work and strive for the highest quality
• Innovation — We empower ourselves and others to be risk-takers and reach beyond the current paradigm; we are open to change and creative new ideas in fulfilling our mission
• Continuous Learning — We understand the principles and concepts underlying our work and take initiative to learn and inform others of “best practices” within our varied disciplines.
• Transparency and Accountability — As stewards of the public trust, we ensure that promises to our supporters are fulfilled and hold ourselves accountable for using our resources wisely
• Ethical Action — We adhere to high ethical standards; we build relationships based on trust, honesty and integrity; and we respect privacy and confidentiality
Context and Alignment with California State University, East Bay’s Strategic Mandates

University Advancement (UA) is a cabinet-level division comprising the following functions: Fundraising — including Major gifts, Corporate & Foundation Relations, Planned Giving, and Annual Campaign — Alumni Relations, Government and Community Relations, Events, Advancement Services, and University Communications, which includes Marketing Communications, Public Relations, and Development Communications.

As a division, UA is responsible for leading and coordinating efforts to achieve two of the university’s seven strategic mandates: “Quest for distinction realized,” and “University of Choice through Regional Stewardship.” Together, these mandates express the institution’s aspirations and highest priorities — to achieve a position of regional leadership, distinction, broad support, and choice. Such a position is expressed by the enthusiastic and proactive decisions of — students to apply, enroll, and attend; — parents and influencers to recommend; — friends and alumni to assist and donate to; — corporations and foundations to partner with and sponsor; — legislators to advocate for; and — regional residents and businesses to talk up and support.

UA recognizes that the achievement of these mandates and vision also requires its involvement in, and work on behalf of three other mandates: “a tradition of teaching, learning and academic quality,” “an inclusive campus climate,” and “vibrant university villages.” Moreover, through its marketing and communications activities, UA is also deeply involved in supporting “strong growth and full enrollment.” Finally, UA’s own values and goals reflect its commitment to “an efficient, well-run University with a culture of accountability.”

Primary Goals and Accountability

UA’s core objective is to build a compelling case for choice and support of CSUEB among friends, alumni, donors, prospective students and influencers, legislators, employers, voters and regional citizens. Thus, UA’s activities revolve around creating and building relationships that provide support for the university in multiple ways, and the contextual activities and infrastructure required for building these strategic relationships. To this end, UA has identified five primary goals:

1. Serve as champion and steward of the university's future by building professional capacity, competence, and capabilities.

2. Facilitate the university’s regional leadership role and stewardship position with strategic plans, activities, and connections that enable it to fulfill its commitments to constituents.

3. Advance the university's mission, objectives, and interests by strategically cultivating, developing, and maintaining relationships with key constituents.

4. Increase awareness of CSUEB and enhance its image by promoting its distinctive strengths, achievements, and contributions, including those of its alumni, faculty, and students.
5. Support the university's quest for distinction and a position of first choice by providing effective communications strategies, messages, tools, and resources.

Opportunities, Challenges, and Measures and Indicators of Success

The opportunities and challenges for each UA goal, together with suggested measures or indicators for achieving each goal follow:

I. Serve as champion and steward of the university's future by building professional capacity, competence, and capabilities.

*Infrastructure & Tools for Effective Relationship Management* — CSUEB stands to benefit immensely from its many valuable existing and potential connections and relationships, which together embody present and potential resources and support required to strengthen and transform the institution into the region's high-access university of choice. To capitalize upon this potential and the extraordinary support opportunities they represent requires the professional infrastructure, systems, and capabilities required to safeguard, manage, and make the most effective and strategic use of information regarding these relationships.

*Measures and/or Indicators of Success:*
— Acquisition and conversion to new alumni, donor, and friends database by June 30, 2008
— Enhanced fund/account database

II. Facilitate the university’s regional leadership role and stewardship position with strategic plans, activities, and connections that enable it to fulfill its commitments to constituents.

*Plans and Processes to Build Strategic Relationships* — CSUEB’s greatest potential for enhanced visibility and increased support and a position of first-choice hinges on its ability to engage in and deliver on the expectations of its constituents in its nascent role as a regional leader and steward. To realize the benefits of the many strategic opportunities that this regional leadership role and position represents, the university must develop stewardship plans and programs with the level of coherency, sophistication, and integration required to rationalize, prioritize, and most effectively capitalize upon its many high-potential relationships and opportunities.

*Measures and/or Indicators of Success:*
— Completion of feasibility analysis for a comprehensive fundraising campaign by December 31, 2008, including:
  • key fundraising priorities;
  • fundraising dollar and donor goals; and
  • budget and campaign plan
— Creation of an on-line alumni community by December 31, 2007.

III. Advance the university's mission, objectives, and interests by strategically cultivating, developing, and maintaining relationships with key constituents.

*Strategic Programs and Activities to Foster Affinity & Support* — The most effective and powerful means of advancing the university's mission, objectives, and interests is by demonstrating its commitment to regional leadership and stewardship by earnestly engaging in
meaningful and strategic external connections, relationships, and initiatives, as well as by raising awareness internally about the importance and most effective means of identifying, fostering, building and sustaining such relationships.

Measures and/or Indicators of Success:
— Increase number of partnered community events, external organization memberships, and campus advisory boards
— Increase number of visits with legislators (on- and off-campus)
— Create new alumni online community base
— Achieve target number of one-on-one visits with past and prospective donors
— Increase number of donors by 5%
— Achieve target number of development events and donors, with 25% of prospects attending events
— Achieve target for number of gifts of $10,000+, size of average gifts of $1,000 and less, and amount of overall giving (gifts and pledges)

IV. Increase awareness of CSUEB and enhance its image by promoting its distinctive strengths, achievements, and contributions, including those of its alumni, faculty, and students.

Programs and Initiatives to Build Position & Create and Promote Case for Support —
The distinctive strengths, achievements, and contributions of CSUEB, together with its hallmark commitment to regional stewardship via high-access, high-quality higher education offer the most powerful and compelling evidence of the institution's worthiness for a position of first choice and support. Building such a case for support and choice requires reinforcing existing stewardship and outreach programs and also underwriting new initiatives to expand, accelerate, and promote the visibility and impact of essential regional connections.

Measures and/or Indicators of Success:
— Number of media hits*
— Number of faculty experts*
— Number of external speaking opportunities*

* The efficacy and impact of the programs and initiatives reflected in these measures and indicators should also be viewed as factors in the results of the baseline awareness and quality perception measures, below.

V. Support the university's quest for distinction and a position of first choice by providing effective communications strategies, messages, tools, and resources.

Capacity and Campaigns to Shape Image & Communicate Position of Choice —
Shaping, projecting, and diligently managing a compelling and distinctive institutional image offers CSUEB the means to stand out and excel in a marketplace crowded with other institutions competing for the same prospective students, friends, donors, and supporters. Success in this endeavor requires a robust integrated marketing and communications capacity together with adequate resources to develop and strategically deploy meaningful, memorable, and relevant themes, messages, and campaigns. This work must also be grounded in a clear understanding of the institution's existing image and position in the community coupled with clarity about its desired position and the gaps it desires and is capable of addressing.
Measures and/or Indicators of Success
— Number of strategic communications created, delivered, and placed with campaign-
  response results tracked where possible
— New baseline awareness and quality perception measures with past comparisons and
  forward monitoring
— Number of prospective student registrants on student web portal (joint goal with PEM)
— Percentage of student web portal registrants who enroll (joint goal with PEM)

The accompanying spreadsheet (UA 0708 Strategic Plan.xls) provides more detailed goals,
measures, and resource requirements supporting the broad goals outlined above.