UNIVERSITY ADVANCEMENT OBJECTIVES AND STRATEGIES

Eight University Advancement Objectives:

1. Become America's #1 public university in total private support by 2020.
2. Raise $2.5 billion from a comprehensive fundraising campaign.
3. Increase the number of annual donors to 240,000.
4. Earn a very satisfied rating from 50% of alumni for providing opportunities to be or stay involved with the university.
5. Demonstrate yearly increases in the number of volunteers actively serving Ohio State.
6. Expand the number of national leaders who award high marks to Ohio State (from 39% to 50% in awareness and from 24% to 40% in very favorable ratings).
7. More than triple the number of advocates and ambassadors who are equipped and motivated to reinforce key university accomplishments and attributes (from an estimated less than 10% to 35%).
8. Double the number of Ohioans who feel a strong connection to the university (from 22% to 44% who report a very strong bond).

NOTE: All objectives, except for #1, are to be realized by the end of the 2015-2016 fiscal year.

Eleven University Advancement Strategies:

1. Increase Value Share with Leadership Gifts
2. Expand Major Gifts Capacity
3. Integrate Corporate, Foundation, and Research Relations
4. Build a Pipeline of Planned Gifts
5. Cultivate a Strong Annual Giving Culture
6. Transform the Alumni Membership and Services Model
7. Establish an Office of Volunteer Relations
8. Align Outreach Efforts in Top Regional Markets Outside of Ohio
9. Implement an Effective Marketing Campaign
10. Craft a Personal Approach to Ohioans
11. Shape a Disciplined Messaging Process

STRATEGY 1: Increase Value Share with Leadership Gifts

Secure the necessary 7, 8, and 9-figure leadership gifts to achieve campaign goals while growing the prospect pool at these levels to provide a solid foundation for continued growth in the post-campaign period.

Metrics:
- Secure 48 commitments ranging from $5-$100 million for a campaign gift total of $650 million (26% of the $2.5 billion goal); and 193 gift commitments of $1-$5 million for a campaign gift total of $355 million (17% of the $2.5B goal)
- Increase the number of $5 million+ prospects from 107 to 200, and the number of $1-$5 million prospects from 299 to 600, providing a solid foundation for positive growth in the post-campaign period

STRATEGY 2: Expand Major Gifts Capacity

Secure the necessary 6-figure major gifts to achieve campaign goals while sharpening and honing of major gift officers across campus and growing the major gifts pipeline by expanding the number of major gift prospects under management.

Metrics
- Secure 1,281 commitments ranging from $100k-$999k for a campaign gift total of $351 million
- Increase the number of prospects rated $100k-$999k from 2,002 to 5,123
- Expand the number of major gift prospects under management in the key unit drivers from 3,421 to 7,100

STRATEGY 3: Integrate Corporate, Foundation, and Research Relations

Work with university partners (office of research, office of sponsored programs, business & finance) to challenge traditional approaches to and models for corporate and foundation relations, engage faculty more fully in the fundraising process to better capitalize on foundation and research-related opportunities, as well as optimize the value of all affinity and business relationships.

Metrics:
- Secure total campaign commitments of $5 million or greater from 10 corporate/foundation funders
- Secure 43 private research grants of $1-$5 million for a campaign total of $70 million

STRATEGY 4: Build a Pipeline of Planned Gifts

Refocus the Gift Planning team to be more pro-active with donors and prospects by implementing a "new legacy gifts" initiative, hosting small group educational events, strategically engaging financial planners and legal advisors, and conducting in-house training for all development professionals.

Metrics:

- Secure TBD# of new legacy commitments during the Campaign. (While not all of these will qualify to be "counted" toward the $2.5 billion goal, the "new legacy gifts" initiative will serve as a complementary strategy to help identify new prospects.)
- Host 42 educational events by the end of the campaign
- Conduct 12 training sessions annually for internal staff

STRATEGY 5: Cultivate a Strong Annual Giving Culture

Build a strong annual giving culture and brand that cultivates donor loyalty and leadership annual giving, while expanding the base of support.

Metrics:

- Deliver annual increases in the # of donor households giving at all leadership annual giving levels after they are re-calibrated
- Establish baseline and multi-year targets for Ohio State Fund giving
- Grow base of annual donors by 20,000 per year

STRATEGY 6: Transform the Alumni Membership and Services Model

Establish a new inclusive Alumni Association membership model that dramatically increases the reach of alumni programs. Deliver "high demand" services like an alumni career network and more intentionally integrate alumni outreach with the colleges, units, and regional campuses.

Metrics:

- # of alumni reached, engaged and utilizing alumni services
- Improve individual levels of engagement

STRATEGY 7: Establish an Office of Volunteer Relations

Establish a new Office of Volunteer Relations that will oversee Ohio State's mission to provide meaningful volunteer opportunities that deepen the individual's commitment to the university and serve significant institutional goals. Modeled after similar services at Stanford, this unit will coordinate placements, share information, provide support and strategically expand volunteer structures and options.

Metrics:

- # of boards/committees and # of volunteers
- # of volunteers assisting with ad hoc volunteer projects
- Compare the alignment of individual volunteer work with institutional goals
- Regular quantitative and qualitative feedback from volunteers
- Annual gift participation rates and average gifts of volunteers

STRATEGY 8: Align Outreach Efforts in Top Regional Markets Outside of Ohio

Align advancement outreach efforts in top regional markets, within and beyond Ohio. Synchronize alumni relations, development, and marketing communications strategies, seeking opportunities to include Admissions and other university partners in order to maximize reach and optimize results as well as revenues.

Metrics:
- Increase total annual revenue yields from targeted market areas
- Increase number of total annual donors from targeted market areas
- Bi-annually assess awareness, favorability and other benchmarks among key leaders

STRATEGY 9: Implement an Effective Marketing Campaign

Implement an effective, comprehensive, integrated marketing campaign(s) to support fundraising, engagement, and admissions and other critical institutional goals in key market(s). These focused multi-media campaigns, including paid media, will increase awareness, improve favorability ratings and help promote greater engagement with key stakeholders.

Metrics:
- Monitor annual returns in each market in terms of giving, volunteering, participating or other key activities
- Bi-annually assess favorability, awareness and other key marketing indicators among key leaders

STRATEGY 10: Craft a Personal Approach to Ohioans

Craft a more personal approach to Ohioans that builds upon their highly positive views of the university and invites them to make "their" university even more effective and successful.

Metrics:
- Bi-annually assess Ohioans' satisfaction with and sense of connection to Ohio State
- Track the new Ohio-based volunteers, donors and partners

STRATEGY 11: Shape a Disciplined Messaging Process

Shape a disciplined messaging process that continuously reinforces core messages and achieves sufficient reach and frequency to maximize results.

Metrics:
- Annually assess the knowledge levels and numbers of ambassadors/advocates and the effectiveness of university communications in strengthening each
- Require each unit and department to annually report on their communications and their efficacy reinforcing the university's brand, key themes and accomplishments