

**THE OHIO STATE UNIVERSITY
ADVANCEMENT STRATEGIC PLAN
2013-2018**



Strategic Planning at The Ohio State University

Ohio State's future will be defined and driven by the University's move from excellence to eminence. Making that move requires a strategic vision and a clear path for achieving it.

Strategic planning is a systematic process, one that builds commitment to priorities essential to mission-critical work. Strategic planning establishes the guideposts that chart the journey toward eminence, and provides opportunities to assess the steps along the way. Strategic planning also helps ensure that the University remains vital, sustainable, and accountable.

All strategic planning at The Ohio State University is founded in the overarching principles of the institution's vision, mission, and values.

Ohio State's Vision

The Ohio State University will be the world's preeminent public comprehensive university, solving problems of world-wide significance.

Ohio State's Mission

We exist to advance the well-being of the people of Ohio and the global community through the creation and dissemination of knowledge.

Ohio State's Values

Shared values are the commitments made by the Ohio State community regarding *how* work will be conducted. Our values at Ohio State include:

- Excellence
- Collaborating as One University
- Acting with Integrity and Personal Accountability
- Openness and Trust
- Diversity in People and Ideas
- Change and Innovation
- Simplicity in Our Work
- Empathy and Compassion
- Leadership

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The Ohio State University and its Advancement program are at an important moment in time. Ohio State is poised to become the country's most vibrant public institution, and in doing so, have tremendous impact for hundreds of millions of people. Advancement at Ohio State exists to support the University as it leads boldly into the future. By increasing awareness of, engagement in, and giving to Ohio State, Advancement will open the doors of opportunity for students, faculty, patients, doctors, alumni, friends, the community, and the world. As our *But for Ohio State Campaign* priorities indicate, we will place students first, elevate faculty and the academic enterprise, create modern learning environments, embolden our research agenda, and drive high-impact innovation. The combination and coordination of communication, engagement, and fundraising efforts are critical to our success.

The integration of The Ohio State University Alumni Association, The Ohio State University Foundation, and University Communications, underway in earnest now, began as an inspired idea in 2007. Over the next few years, momentum built around the Advancement idea and planning groups convened. Resulting from their hard work, we have an Advancement framework, a visual identity, and an institutional position statement. Some groups of central staff have combined, and more efforts to align staff are in process. Chief Advancement Officers are at work in many colleges and units, and they are covering new ground with deans, directors, faculty, students, alumni, donors, and others.

Yet, we still strive to define Advancement, create the environment necessary for implementation, and move on to the true business of communication, engagement, and fundraising. It is crucial that we accomplish these things, and more, over the next five years. This strategic plan provides a road map for Advancement's success. It outlines where we need to go, and it points to the roads we need to take to get there.

These efforts are all in service to the greater University vision. The Ohio State University *will* be the world's preeminent public comprehensive university, solving problems of world-wide significance. Ohio State Advancement is fully committed to supporting this ambition.

Sincerely,

Michael C. Eicher
Senior Vice President for Advancement
President, The Ohio State University Foundation

Ohio State Advancement Overview

In 2007, The Ohio State University embarked on a journey to unite alumni relations, communications and marketing, and fundraising with the purpose of redoubling efforts to build awareness of, engagement with, and giving to the University. The strategic combination of The Ohio State University Alumni Association, The Ohio State University Foundation, and University Communications would not only uphold our concept of One University, but would also place Ohio State among the premier academic and research institutions in the country. In the words of E. Gordon Gee, Advancement “will allow us to achieve our shared aspirations.”

Our shared aspirations – specifically to collaborate as one and to achieve eminence – have been a constant source of motivation for the alumni, communications, and fundraising organizations during the early stages of Advancement. As defined by the Board of Trustees in 2008, Advancement is “the strategic, University-wide integration and coordination of alumni relations, communications and marketing, and development functions to foster positive relationships with students, alumni, and other key audiences; provide multiple opportunities for engagement; and generate involvement with and support for the mission of The Ohio State University.”

To aid in our efforts, an Advancement Framework Planning Team was appointed in 2011. Chaired by Trustee Gil Cloyd, the team’s task was to develop a blueprint for the University to accomplish the initial integration of the three Advancement functions. The team engaged global public relations firm Edelman Consulting to assist in the planning work, and together they delivered the blueprint in 2012 in the form of our Advancement Framework Plan.

The Advancement Framework Plan provided Ohio State with three key building blocks for Advancement implementation: institutional position, market segmentation, and organizational design. Our institutional position statement clearly articulates what the University stands for, and will be used to guide messaging, outreach activities, and decision-making. Our marketing segmentation helps us to understand what stakeholders want and need from the University so it can deliver on those expectations. Our organizational design must create the right structure to activate our brand and drive deeper engagement with stakeholders.

Institutional Position

Ohio State is a dynamic community where opportunity thrives. Through our far-reaching network of diverse resources and perspectives, we foster the incisive thinking, spirit of collaboration, and depth of character you need to transform yourself and your world.

Now, it is Ohio State Advancement’s charge to implement the institutional position, marketing segmentation, and organizational design to our best advantage. The goals within this strategic plan are rooted in the discoveries made by the Advancement Framework Planning Team. The goals also build upon the distinct identities of The Ohio State University Alumni Association, The Ohio State University Foundation, and University Communications. These identities, illustrated below, will be the three cornerstones our of combined Advancement efforts moving forward.

The Ohio State University Alumni Association

Alumni, who number nearly 500,000 worldwide, are Ohio State's most enduring asset. Beginning with six graduates in 1879, the Ohio State Alumni Association has dedicated itself to connecting alumni, students, and friends of the University in lifelong support of Ohio State and each other.

The Ohio State University Alumni Association is focused on engaging and enriching the lives of alumni by connecting them with their alma mater through an array of services, including robust programming and compelling communications. The Association has a global presence, with more than 50 societies and 200 clubs

throughout the world. But the Alumni Association strives to stay connected no matter the miles that separate, showing how firm alumni friendship is for Ohio State.

The Ohio State University Alumni Association is committed to fostering a climate of inclusion, and in 2012, moved to a new membership model that made each and every Ohio State alumnus a member. There is strength in the great diversity of Ohio State alumni, and Ohio State's future growth rests in the ability to recognize, incorporate, and enhance diversity through leadership, programs, services, employment, and publications.

The Ohio State University Foundation and Office of University Development

The Ohio State University Foundation is the University's fundraising and gift-receiving organization. It was founded in 1985 as a non-profit, tax-exempt organization that advances the mission of Ohio State by pursuing and securing private support to benefit Ohio State students, faculty, programs, and facilities.

Buckeye alumni and friends have a generous history, from the first focused campaign at Ohio State that raised approximately \$1 million to help build Ohio Stadium in 1922, to the \$1.23 billion *Affirm Thy Friendship* campaign that raised more in just five years (1995-2000) than the University had over its previous 123 years. This overwhelming "pay forward" attitude held by alumni and friends helps The Ohio State University Foundation direct critical dollars to the many important causes within the University.

On October 4, 2012, the University officially launched the *But for Ohio State Campaign*, a \$2.5 billion fundraising endeavor that is the largest campaign in Ohio State's history. As of May 2013, more than 400,000 alumni and friends have contributed more than \$1.5 billion to the campaign. The campaign will allow Ohio State to implement visionary new ideas for the student experience and to use our breadth of disciplines to tackle complex global problems related to food production and security, health and wellness, and energy and the environment.

Office of University Communications

The task of telling Ohio State's remarkable stories is the privilege of the Office of University Communications. In order to do so more effectively, University Communications reorganized in early 2013. The restructuring centered on creating a more agile, more proactive, and more data-driven organization, without losing the art intrinsic to all communications.

A renewed and reinvigorated University Communications is now gathered in work groups centered on function instead of audience. These work groups are: branding and marketing communications, editorial communications, interactive communications, media and public relations, operations, relationship management, and WOSU. These groups were developed strategically to enhance not only how central University Communications runs, but also how it serves the greater University.

University Communications aims to be a highly collaborative, innovative, and analytical team that maximizes relationships with the vast communications talent in the colleges and units. They are also wholly focused on creating a core set of One University messages, cohesive University brand and visual identity, and strong, robust stories about Ohio State's excellence. They will maximize use of talent, create excellence in service, foster integration, require collaboration, and increase the quality and impact of communications work.

Strategic Scan of External Environment

Globalization

The Ohio State University's peer set is no longer local or even national; the University competes with institutions around the globe for the best students, faculty, staff, and resources. Differences in cultural values and perspectives influence individuals' communication preferences, engagement interests, and giving behaviors, greatly impacting the ways Ohio State Advancement must work. As the University becomes more dependent on global partnerships, Advancement requires new strategies and specialized resources to manage complex opportunities and potential risks.

Technology

To have the worldwide impact it seeks, The Ohio State University must maintain a competitive edge when it comes to modern technologies in business, science, industry, information, health, and more. As a player on the global stage, the University must use the most current technologies available, as well as bring new technologies into existence. Advancement must deliver information to audiences using popular tools, reach out to stakeholders using innovative methods, and secure support for research and development that will lead to original technologies conceived at Ohio State.

Economic uncertainty

Americans were hit hard in the economic downturn of 2007-2009, with home values dropping dramatically, private savings losing significant value, and unemployment rising faster than it had in decades. Needless to say, the recession slowed philanthropic giving, especially transformational gifts of \$5 million or more. Though in economic recovery today, a real and perceived financial uncertainty continues to impact philanthropic support for institutions of higher education. The Ohio State University, and therefore Advancement, must make an ever more convincing case for support in an environment of fierce competition for limited charitable donations.

Tuition and student debt

Nationally, the rising cost of tuition has left students and their families with significantly higher levels of personal debt. In the worst cases, students were forced to end their pursuit of a college degree simply because they could not afford it. Ohio State is a public institution committed to providing broad access to quality education. The University has demonstrated its commitment to affordability by recent freezes of in-state tuition, but future increases cannot be ruled out. Therefore, to maintain access to Ohio's flagship university, one of Advancement's fundraising priorities must be financial aid, especially for students with the greatest need.

Federal and state support

Financial support for higher education, health care, and research has been and will continue to be cut at both the federal and state levels. As a research university and medical center, Ohio State faces potential decline unless it can revitalize funding in ways that do not rely on previous sources of public dollars. New partnerships with government and industry are essential to financial stability, and the University is well equipped to maximize opportunities in these areas. Advancement, as the communicating, relationship-building, and fundraising arm of Ohio State, will be important as the University develops innovative financial strategies for sustainability.

Federal and state policy

Even as federal and state dollars toward higher education are contracting, federal and state policies for higher education are expanding. Increased political action and governmental regulation are impacting institutes of teaching, learning, research, and innovation such as The Ohio State University. Ohio State must find new ways to work in this public environment if it is to thrive in the twenty-first century. As the University becomes subject to more accountability measures, Advancement will partner with other units to maintain public trust through transparency and compliance.

Strategic Scan of Internal Environment

One (Big) University

Very few institutions have the vast array of opportunities in teaching, learning, research, and innovation present at The Ohio State University. Even fewer institutions have the ability to reach out and engage an entire state and beyond. Ohio State's visionary efforts to promote One University have focused leadership, resources, and planning on the power of the collective institution to solve not only Ohio's, but the world's most complex problems. A collaborative body of students, faculty, staff, volunteers, alumni, and friends shares compelling stories, promotes widespread involvement, and raises philanthropic support through a common focus on the University's core goals and discovery themes.

Defining Advancement

As a newer concept within the University, Advancement is ambiguous and understood differently across groups. Clearly defining Advancement, both as an organization and as a movement, is crucial to success. Advancement as a movement requires the seamless integration of communications, alumni relations, and development. Treating these functions as inextricably linked parts of a whole will allow Ohio State to maximize the full spectrum of stakeholder experience from awareness through engagement to giving. As an organization, Advancement leadership and staff must commit to building talent, infrastructure, and culture. With these fundamental priorities influencing our work, Advancement's strategic goals will be achieved as a strong team.

Advancement Leadership

The top positions within Advancement have experienced significant turnover in previous years, creating perceived instability and lack of a clear organizational vision. Stability and vision from leadership are essential; in a complex, decentralized institution, distributed decision-making can challenge the speed and consistency of quality results. With a clear integration plan and a core leadership team, Ohio State will begin to realize great benefits from Advancement's alignment of communications, engagement, and fundraising.

Awareness

The University's rise to eminence is dependent upon public awareness of our unmatched research, teaching and learning, and service opportunities. Using a proactive approach and visionary thinking, leadership must partner across campus to share Ohio State's stories with the world in consistent and compelling ways. This requires aligned marketing and communications talent, a harmonious brand identity and messaging program, expanded content development and delivery strategies, and targeted and timely promotion of our people and programs.

Engagement

At The Ohio State University's core is a belief in education for citizenship, and Advancement serves this belief by engaging our own local community and the global community every day. Leadership must broaden and deepen constituent participation in activities that are sponsored by or on behalf of Ohio State with the aim of growing lasting and beneficial relationships that contribute to mutual success. Alumni, friends, and other key stakeholders can expect Advancement to deliver coordinated outreach, tailored attention, and increased opportunities to connect.

Giving

The continued success of Ohio State's students, faculty, and programs relies on the goodwill of our donors, alumni, and friends. Simply put, leadership must expand philanthropic support for the University's vital priorities. Advancement will elevate giving to The Ohio State University through comprehensive fundraising strategies, focused donor relations and stewardship, increased emphasis on major and principal gifts, customized cultivation of gifts from special groups or to specific areas, and a successful \$2.5 billion campaign.

Talent

The national talent pool for quality Advancement professionals is small, yet a high-performing, service-oriented staff is crucial to the success of Ohio State Advancement. Leadership will focus on recruiting, retaining, and cultivating a diverse and collaborative team of creative thinkers, effective communicators, and cooperative problem-solvers who are committed to the University's values and vision. Considerable talent initiatives, such as national candidate searches, competitive applicant pools, ongoing training opportunities, and performance recognition programs will signify our dedication to Advancement talent.

Infrastructure

Advancement will need to support its own sustainable growth with an unshakable infrastructure. Through substantial and sensible investment of time, money, and effort, leadership will build integrated systems and solutions that deliver results in responsive and reliable ways. An efficient and effective Advancement infrastructure will be characterized by clear purposes, strong fiscal management, aligned functions, consolidated services, dependable policies and procedures, robust technology, and constant feedback mechanisms.

Culture

A healthy culture is not easy to measure, but it is an essential ingredient for Advancement's future achievement. By consistently modeling the care and competence required in a first-rate organization, leadership will nurture a professional climate that is committed to service, integrity, innovation, collaboration, and above all, excellence. High standards, open communication, creative thinking, and powerful results will be the hallmarks of Advancement's new culture.

Advancement Mission

Ohio State Advancement will support the University's mission by expanding awareness of, advocacy for, engagement in, and giving to Ohio State.

By expanding awareness of, advocacy for, engagement in, and giving to Ohio State, we will enable The Ohio State University to advance the well-being of the people of Ohio and the global community through the creation and dissemination of knowledge.

Advancement Vision

Ohio State Advancement will be the most dynamic and effective advancement organization in higher education.

As the most dynamic and effective advancement organization in higher education, we will help The Ohio State University realize its vision to be the world's preeminent public comprehensive university, solving problems of world-wide significance.

Advancement Values

Ohio State Advancement is committed to the University's stated values and is dedicated to supporting the teaching, learning, research, innovation, outreach, and engagement of our constituents, academic partners, and University colleagues.

As members of The Ohio State University community, our values include:

- Excellence
- Collaborating as One University
- Acting with Integrity and Personal Accountability
- Openness and Trust
- Diversity in People and Ideas
- Change and Innovation
- Simplicity in Our Work
- Empathy and Compassion
- Leadership

Advancement Goals

Over the next five years, Ohio State Advancement will:

1. Increase awareness of and advocacy for the University, resulting in recognition of Ohio State's research, teaching and learning, and service excellence
2. Broaden and deepen constituent engagement with the University, developing more meaningful relationships with Ohio State's alumni, friends, and students
3. Expand philanthropic support to the University, raising \$550 million annually by 2018 for Ohio State's students, faculty, and core institutional priorities
4. Build higher education's top performing Advancement organization, with first-rate talent, integrated infrastructure, and a highly collaborative culture

Advancement Goals and Objectives

- 1. Increase awareness of and advocacy for the University, resulting in recognition of Ohio State's research, teaching and learning, and service excellence**
 - a. Create ongoing partnerships that align and amplify marketing and communications talent
 - b. Implement a One University brand identity and messaging program for consistent representation and continual recognition
 - c. Expand and improve content development and delivery strategies to emphasize Ohio State's status as a top-ranked public university with the power to transform lives
 - d. Enhance audience segmentation and analytics to deliver the right messages to the right people
 - e. Protect and promote Ohio State's reputation through a proactive approach to issues management
 - f. Increase the circulation and saturation of positive stories in regional, national, and international media

- 2. Broaden and deepen constituent engagement with the University, developing more meaningful relationships with Ohio State's alumni, friends, and students**
 - a. Develop shared engagement strategies aligned with college, unit, and institutional priorities and shared engagement services that assist with the work of colleges, units, and volunteers
 - b. Design a regional strategy to engage alumni and friends around the world
 - c. Create an early engagement strategy to strengthen the bond between Ohio State and its students and young alumni
 - d. Strengthen ongoing relationships with alumni and friends through improved volunteer engagement
 - e. Improve events to strategically engage key constituents

- 3. Expand philanthropic support to the University, raising \$550 million annually by 2018 for Ohio State's students, faculty, and core institutional priorities**
 - a. Develop a comprehensive fundraising strategy anchored to core institutional priorities
 - b. Improve donor retention through focused donor relations and stewardship strategies
 - c. Increase the quantity of principal, major, annual, and first-time gifts by employing innovative fundraising strategies
 - d. Improve giving rates among key constituent groups, including alumni, parents, corporations, and foundations, through particular attention to their unique characteristics
 - e. Accelerate and elevate fundraising in every major philanthropic area, especially health sciences and medicine
 - f. Exceed \$2.5 billion in gifts and pledges for the But for Ohio State Campaign by June 30, 2016
 - g. Begin planning for the next campaign by July 1, 2015

- 4. Build higher education's top performing Advancement organization, with first-rate talent, integrated infrastructure, and a highly collaborative culture**
 - a. Clarify and communicate the structure and purpose of the Advancement organization
 - b. Streamline management systems and policies for better services and stronger results
 - c. Enhance core technology and data capabilities
 - d. Recruit, retain, and cultivate the best talent in the industry