## SUMMARY

### FY12-13 Strategic Plan

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Plan Campaign</td>
<td>Expand Donor Pipeline</td>
<td>Finish Invent the Future</td>
<td>Future of Healthcare</td>
</tr>
<tr>
<td>6</td>
<td>Alumni Participation &amp; Engagement</td>
<td>Board Development &amp; Engagement</td>
<td>Technology</td>
<td>Retaining &amp; Developing Talent</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td>Metrics and Analytics</td>
</tr>
</tbody>
</table>
Planning for Campaign

- Vision for 2020
  Future of UC San Diego

- Campus-wide Initiatives

- General Campus Campaign
  vision, strategy and plans

- SIO Second Century Campaign
  vision, strategy and plans

- Health Sciences Campaign
  vision, strategy and plans

- Competitive assessment,
  benchmarking, environmental
  scan and assumptions

- Financial modeling and
  assumptions

- Key internal stakeholders
  meeting to develop UC San
  Diego’s vision, strategy and
  plans

- Key external stakeholders
  meeting to review and refine UC
  San Diego’s vision, strategy and
  plans

- Finalize the campaign goals,
  theme, vision, plans, priorities

- Org. capacity assessment,
  staffing plans and budgets
Suggested governance framework with qBio as an example

**External Advisory Board**

**Objective:** Assist with refining the vision, strategy, plans, messages, outreach and transformative/principal gift prospects

**Meeting Frequency:** Once or twice a year

**Suggested Participants:** Current and potential transformative/principal gift prospects, leading global experts in qBio-related fields, community partners, others (TBD)

+ Executive Committee members EVC (Suresh Subramani), AVC-AA (Ann Addo), VCEBA (Steve Relyea), Dean-PhySci (Mark Thiemens), Dean-BioSci (Steve Kay), co-Directors, others (TBD)

+ select members of the operating committee: AVC-GC (TBD), AVC-AA (Armin Afsahi), SEDOD-ACP (Sarah Godfrey), SEDOD-PG (Lynda Heaney), SEDOD-GC (Shail Kumar)

**Staff:** qBio Campaign Director: SEDOD-GC (Shail Kumar)

---

**Executive Committee**

**Objective:** Provide strategic guidance and oversight to the vision, strategy, plans and outcomes, and assist as appropriate

**Meeting Frequency:** Quarterly

**Suggested Participants:** EVC (Suresh Subramani), AVC-AA (Ann Addo), VCEBA (Steve Relyea), Dean-PhySci (Mark Thiemens), Dean-BioSci (Steve Kay), co-Directors, others (TBD)

+ select members of the operating committee: AVC-GC (TBD), AVC-AA (Armin Afsahi), SEDOD-ACP (Sarah Godfrey), SEDOD-PG (Lynda Heaney), SEDOD-GC (Shail Kumar)

**Staff:** qBio Campaign Director: SEDOD-GC (Shail Kumar)

---

**Operating Committee**

**Objective:** advance the qBio initiative, review transformative and principal gift prospects, outreach plans, pipeline, review strategy and make recommendations, as appropriate to the Executive Committee

**Meeting Frequency:** Monthly

**Suggested Participants:** VCEBA (Steve Relyea), AVC-GC (TBD), AVC-AA (Armin Afsahi), SEDOD-ACP (Sarah Godfrey), SEDOD-PG (Lynda Heaney), SEDOD-GC (Shail Kumar), SDOD-PhySci (Mel Cruz), SDOD-BioSci (Michael Horvat), SDOD-CFR (Keith York), DOD-Research (Andillon Hackney), EDOD-Publications (Michele Humphrey), Others (TBD)

**Staff:** qBio Campaign Director: SEDOD-GC (Shail Kumar)
Expanding Pipeline

- Engage Alumni at Deeper Level
- Change Student Experience
- Restructure Development Committee
- Convert Research into Prospects
Invent the Future

- Raise $11M by December
- Two New External Groups
- Realign Scholarships with Alumni
- Create New Messaging
Future of Health Care

- Needs Assessment
- Guest Relations
- Refine Messaging
- Create H.S. Board
Messaging

- Target Segments
- Engage Constituents
- Redesign Websites
- Focus on Big Initiatives
Alumni

- Critical Success Factor
- Alumni Center
- Scholarships
- Outreach
Board Engagement

- Ownership of Campaign
- Network Board to Other Boards
- Restructure Development Committee
- International Representation
Technology & Tools

- Migrate CMS
- Predictive Modeling
- Online Philanthropy
- Data Quality
Recruitment & Retention

- Onboarding
- Training
- Alignment of Staff & Opportunities
- Hiring
Metrics

- Prospect Management
- Pipeline Assessment
- Dashboards
- Wealth Screeing
UC San Diego
CAMPAIGN OVERVIEW & TIMELINE

CCS Study & Analysis ➔ Vision & Brand ➔ Philanthropic Needs ➔ Campaign Readiness ➔ Lead Gift Solicitations ➔ Solicitation ➔ Campaign Management

2011 to 2013
SILENT PHASE

2014 to 2020
PUBLIC PHASE
Feasibility Study

RECOMMENDATIONS

1. LAUNCH COMPREHENSIVE CAMPAIGN
2. IMMEDIATELY FOCUS ON PRINCIPAL AND LEAD GIFTS
3. INTEGRATE STUDY DATA INTO DONOR-CENTRIC MESSAGING
4. FOCUS ON TRANSFORMATIVE SUSTAINABILITY
5. BROADEN DONOR BASE / PIPELINE DEVELOPMENT
6. FOCUS ON DONOR ACQUISITION AND CULTIVATION
7. FOCUS ON RETENTION AND STEWARDSHIP
8. DEVELOPMENT STAFFING (BREADTH AND DEPTH)
9. FORMALIZE INTERNAL & EXTERNAL LEADERSHIP
10. FOCUS ON PRINCIPAL AND MAJOR GIFTS
Feasibility Study

PHILANTHROPIC MOTIVATORS

1. UNIFIED VISION
2. ACADEMIC & RESEARCH QUALITY
3. COLLECTIVE IMPACT
4. STATE OF THE ART FACILITIES
5. QUALITY OF FACULTY
6. JACOBS GIFT AS TESTAMENT
7. ACADEMIC VALUE
Vision & Brand
INTEGRATION OF DONOR-CENTRIC MOTIVATORS

DONOR-CENTRIC CAMPAIGN MARKETING & COMMUNICATIONS PLAN

COLLABORATION AND ALIGNMENT WITH HS MARKETING & COMMUNICATIONS

ELECTRONIC COLLATERAL
PRINT COLLATERAL
VIDEO COLLATERAL
EVENT COLLATERAL
PUBLIC RELATIONS

CCS Study & Analysis ➔ Vision & Brand ➔ Philanthropic Needs ➔ Campaign Readiness ➔ Lead Gift Solicitations ➔ Solicitation ➔ Campaign Management
Vision & Brand
INTEGRATION OF DONOR-CENTRIC MOTIVATORS
Philanthropic Needs
STRATEGIC PRIORITIES

FACULTY RECRUITMENT
STUDENT AID
CAPITAL PROJECTS
PROGRAMS & RESEARCH

CAMPAIGN PRIORITIES & CASE FOR SUPPORT

- Capital Projects
- Faculty Recruitment
- Student Aid
- Programs & Research

CCS Study & Analysis
Vision & Brand
Philanthropic Needs
Campaign Readiness
Lead Gift Solicitations
Solicitation
Campaign Management
Campaign Readiness

PIPELINE & DONOR ACQUISITION

CURRENT DONORS
2ND GENERATION DONORS
PAST AND LAPSED DONORS
GRATEFUL PATIENTS
BOARDS & COMMITTEES
VOLUNTEERS
FACULTY & STAFF
ALUMNI
DEMOGRAPHIC
GEOGRAPHIC

PIPELINE ENTRY POINTS
Campaign Readiness

STEWARDSHIP AND RETENTION

PRINCIPAL GIFT STEWARDSHIP
PERSONALIZED LETTERS
DVD WITH VIDEOS
SALON EVENTS
MOCK-UP SITE TOURS
HARD HAT TOURS
TOPPING OFF CEREMONY

MAJOR GIFT STEWARDSHIP

CCS Study & Analysis → Vision & Brand → Philanthropic Needs → Campaign Readiness → Lead Gift Solicitations → Solicitation → Campaign Management
Campaign Readiness
FORECASTING & BENCHMARKING

CAPACITY ANALYSIS
FORECASTING
RANGE OF GIFTS
DONOR SEGMENTATION
CAMPAIGN BENCHMARKING
Campaign Readiness
LEADERSHIP IDENTIFICATION

CAMPAIGN STAFF LEADERSHIP
CAMPAIGN INTERNAL
LEADERSHIP
CAMPAIGN EXTERNAL
LEADERSHIP
IDENTIFY INTERNAL
STAKEHOLDERS
IDENTIFY EXTERNAL
STAKEHOLDERS

CCS Study & Analysis ➔ Vision & Brand ➔ Philanthropic Needs ➔ Campaign Readiness ➔ Lead Gift Solicitations ➔ Solicitation ➔ Campaign Management
Campaign Readiness
FINANCIAL CAPACITY ANALYSIS

UC SAN DIEGO 2010-2011

FACULTY SUPPORT
PRIVATE GRANTS
PLANNED GIFTS
MAJOR GIFTS
PRINCIPAL GIFTS

30%
21%
18%
16%
15%
Campaign Readiness
STAFFING ASSESSMENT

ASSESS STAFF LEADERSHIP & CAPACITY
PROVIDE STAFFING RECOMMENDATIONS
ASSESS MGP CAPACITY DEPTH & BREADTH
INSTITUTE UPDATED EVALUATION METRICS
PREPARE CAMPAIGN STAFFING
Lead Gift Solicitation

SOLICIT TRANSFORMATIVE GIFTS

CONCERTED FOCUS ON CULTIVATING & SOLICITING PRINCIPAL GIFT PROSPECTS

SECURE LEAD GIFTS TO BUILD MOMENTUM IN PREPARATION OF PUBLIC PHASE
Gift Solicitation
LEVERAGE DEVELOPMENT RESOURCES

PRINCIPAL GIFTS
MAJOR GIFTS
PLANNED GIVING
CORPORATE & FOUNDATION
Capital Campaign
COMPONENTS

1. LEAD WITH GENERAL CAMPUS, HEALTH SCIENCES, SIO INITIATIVES
2. EVALUATE HOW NEEDS INTERSECT WITH DONOR INTEREST
3. LAUNCH COMPREHENSIVE CAPITAL CAMPAIGN
Campaign Management
INCREASE DEVELOPMENT CAPACITY

READINESS & STRATEGY
PIPELINE & ACQUISITION
STEWARDSHIP & RETENTION
BENCHMARKING & TRACKING
Campaign Plan
CAMPAIGN COMPONENTS

UC AVERAGE 2010
- DEPARTMENT SUPPORT: 33%
- STUDENT SUPPORT: 8%
- FACULTY: 31%
- RESEARCH: 17%
- OTHER: 11%
Thank You

- CCS Study & Analysis
- Vision & Brand
- Philanthropic Needs
- Campaign Readiness
- Lead Gift Solicitations
- Solicitation
- Campaign Management

2011 to 2013
SILENT PHASE

2014 to 2020
PUBLIC PHASE