Fheabhsú Cáilíochta
Quality Enhancement

Quality Enhancement Plan

Alumni & Development

28/05/2020

FOR COMPLETION BY QEU	
Date of Peer Review visit: 8th – 10th October 2019	Head of Unit: Cal Healy, Director of Development
Link to Panel Report published on QEU website: https://www.ucc.ie/en/media/support/qualityenhancementunit/reports/admin/PanelReport-AlumniandDevelopment.pdf	Date QEP considered by Quality Enhancement Committee:

Abbreviations:

Executive Director – ED   Director of Development – DOD   Director of Alumni Relations and Annual Giving – DOAR&AG   Director of Communications – DOC

Heads of Development - HOD

Item No	Panel Recommendation	Actions Planned[1]	Responsibility For Action[2]	Resource Implications[3]	Implementation Schedule[4]	Effectiveness/Impact[5] To be completed as part of follow-up
Strategic						

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[1] May include actions planned within the unit or those that require interface with other parts of the university

[2] E.g. Head of Unit, all staff, specific committees etc

[3] Resources – the financial or human resources required to implement the recommendation

[4] Interim milestone dates can be included here (e.g. within 6 months, within 12 months, within 3 years etc.)

[5] **To be completed as part of follow-up 12-15 months post publication of QEP** - Recognising the need to reflect on the effectiveness of actions undertaken, and to what extent the actions have achieved their intended outcome

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1.	The Panel recommend developing a multi-year project commitment for fundraising priorities consistent with the UCC Strategic Plan:	Note as of April 2020 Alumni and Development's goals and objectives align with the University's Strategic Plan 2017 – 2022. As of October 2019, this office reports directly to the President, Prof. Patrick O'Shea (on an interim basis), until the Executive Director (ED) is recruited. This department is functioning in a challenging and dynamic environment due to the COVID-19 pandemic, and in addition, it is in a transition phase pending the recruitment of the ED. The department is agile and it is responding to a number of strategic priorities and fundraising opportunities (such as, fundraising for research				

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	• Within this project commitment A&D should develop short, medium and long-term horizons to enable short and medium-term wins. (As outlined below)	into COVID-19, data enhancement and the effective implementation of a new alumni engagement web platform). ED, DOD, HOD, HOC For Development This will be implemented when the ED is in place. DOD & HODs to identify and plan with the HOCs/Library/Student Experience to identify the short, medium and long term funding priorities.	ED, DOD, HODs, HOCs, Heads of Student Experience/ Library.	ED, DOD plus additional HODs for CACSS & Student Experience.	Ongoing HODs are in place.	
Professional Staff Development						
2.	The Panel recommend commitment to the ongoing professional development of the office by implementing the performance management system already established in a meaningful way:					

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	• Introduce measurements of performance such as KPIs	Annual KPIs agreed and in place for Development. DOD/HODs have defined annual individual fundraising metrics. Agreed outputs in place for support team.	ED/DOD	None	In place	
	• Hold regular meetings with line managers and staff where KPIs are reviewed;	Monthly all Staff meeting in place. DOD holds weekly and monthly Development **Team** meetings to review actual outputs v plan.	ED when in place- currently DOD +	None	In place	
		DOD, DOAR&AG, DOC holds weekly and monthly meetings with individual team members to review actual individual outputs v plan.	All Directors	None	In place	
		Introduce the UCC Performance Management review system with each individual staff member	All Directors	None	Commence October 2020	

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	• The Panel recommend developing a multi-year project commitment for fundraising priorities consistent with the UCC Strategic Plan: Within this project commitment A&D should develop short, medium and long-term horizons to enable short and medium-term wins.	DOD and HOD's agree with HOCs Priorities consistent with UCC SP. HODs work towards these priorities. HODs to respond to University wide Priorities as dictated from time to time.	ED HOCs, DOD & HODs	Where existing HODs in place-no resource implications. ED TBC, DOD TBC and For CACSS & Student Experience HODs- 2FTE required plus 1 FTE support.	Immediate for existing HODs. 6-18 months once ED, DOD & HODs recruited.	
3.	The Panel recommend that training programmes for staff should be put in place focused on professional development in the areas of both Alumni and Development.	Training and Development Plan to be put in place for Alumni & Development Team	All Directors	€20,000 P/a minimum.	Q4 2020	
Alumni Relations						
4.	The Panel recommend that the Alumni Strategy be revised so that it: Clarifies the alumni proposition;	Institute a series of polls and alumni focus groups to consider the alumni proposition, using the 175 Reconnect	Director of Alumni Relations and Annual Giving (DOAR&AG)	Limited budget implication for focus group; communications team to drive engagement with 175	Second half of academic year 2020-21	

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		programme to identify and engage high-affinity and supportive alumni who will want to participate and contribute to the development of a mission-based proposition that aligns with UCC's strategy and character.		Reconnect programme		
	• Articulates the benefits for alumni of being engaged and involved;	Advocate for institution-level alumni benefits that match our peers; use the 175 Reconnect programme to innovate new ways for alumni to become involved while also re-badging existing programmes to create a compelling narrative around the benefits of becoming involved in anniversary year 2020-21.	DOAR&AG)	Enhanced benefits package requires pan-institutional support; no resource implications to 175 Reconnect outside existing budget and team	From Spring 2020 to August 2021	
	• Specifies the opportunities for alumni to give back;	Articulate the volunteering and	DOAR&AG	None	From soft launch of iModules	

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		donating opportunities at every touchpoint.			(scheduled for May/June 2020)	
	• Introduces and clarifies alumni engagement metrics;	Adopt CASE metrics and report monthly.	DOAR&AG	Interim resource for the database team has been achieved through the creation of a temporary Senior Database Officer role and the refocusing of the Alumni Relations Assistant EA position into database support. While this is adequate to deliver CASE metrics, the long-term viability of the database function remains fragile (see response to the Advancement Services	Delivered from May 2020	

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				recommendation below).		
	• Considers the transition point from student to alum - a strategy dedicated to the first five years should be developed to ensure a smooth transition from student to alum;	Engage further with the Joint Conferrrings Unit, and with Graduate Attributes and the Careers Service to create a joined-up approach to the student-alumni transition.	DOAR&AG	None	Iterate increasing levels of engagement with each Conferring cohort	
	• Builds strategies and workflows to move alumni engagements along a clear trajectory - consider the alumni journey from the perspective of alumni and how that impacts on all activities including events, communication, benefits and services;	In due course, adopt an engagement tool that assigns alumni to various engagement levels related to the alumni proposition, and determine strategies to move alumni along the journey (eg from Lost to Observer to Endorser to Follower to Contributor to Owner to Leader).	DOAR&AG	See response to the Advancement Services recommendation below.	Implement once the other priority actions in Advancement Services have been delivered	
	• Reinforces key relationships with internal stakeholders, e.g. faculty, career services, admissions, student experiences;	Use 175 Reconnect and then the development of the alumni proposition to drive engagement with faculty (via the College Alumni Coordinators),	DOAR&AG	None	Commenced	

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	• Reinforce synergies between alumni relations and development.	sports and student societies, careers service etc. Increase donor base substantially to create new prospects and legacy pledges; develop annual giving programme in tandem with major gift appeals; liaise with prospect research function to share information through event and volunteer management processes.	DOAR&AG	Presupposes the hiring of two Annual Giving posts (Annual Giving Officer and Stewardship Officer) as per the 2017 UMTO-approved Org Chart	Implement once the resources for Annual Giving have been allocated	
Development						
5.	The Panel recommend the development of entrepreneurial and proactive behaviour within the team: • It should be the personal responsibility of each fundraiser to proactively source and engage with new prospects and to source and engage with faculty within UCC;	Head of Developments (HODS) and Prospect Researcher responsible for identifying and engaging new prospects. Utilization of A&D support and engagement with Project Champions	HODs with oversight from Director of Development (DOD)	DOD TBC plus HODs for CACCS & Student Experience-2 FTEs required.	Immediate with existing HODs- 6 months if HOD CACSS is recruited and HOD Student Experience 12-18 months if recruited.	

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		critical to identify and sourcing new prospects.				
	• The team should foster and cultivate creative thinking in regard to fundraising endeavours;	Weekly Development Team Meeting to include a standing Agenda Item- on creative fundraising ideas	DOD	None	Immediate	
	• The team should develop a model of professional support that anticipates the needs of senior faculty: each team member should plan ahead for meetings with faculty, prepare briefings and have a clear strategy in regard to desired outcomes.	DOD & HODs to attend College Executive Team Meetings & plan with HOCs funding priorities aligned with SP. SOP to be put in place for HODs re meeting preparation, research and donor engagement strategies	ED, DOD and HODs plus Development Team supports	None	In place with existing HODs Immediate	

Advancement Services					
6.	The Panel recommend that the current database is used and interrogated to its full capacity that the database is upgraded as a matter of urgency and that staff are hired with immediate effect to ensure strong oversight and direction for this area.	Bring in full alumni data from student records; tidy up RE in line with CASE metrics; institute regular management team reports; review SOPs for data entry across the whole team and re-train colleagues in correct procedure; re-establish appropriate permission levels; introduce engagement tool; integrate prospect management and gift pipeline with other RE data services. Hire or reallocate staff into the database team.	DOAR&AG	There has been a chronic failure to resource Advancement (database) Services over decades and this has still has not been addressed, despite the recent resourcing of the department. The current configuration is inadequate for the ambitions of the UCC strategic plan while also creating a number of risks in the department around the delivery of the function. A dedicated senior	Dependent on resources	

			leadership role is required as well as an additional permanent database staff.		
Communications					
7.	The Panel recommend that the website and social media activity with high quality materials are used as tools to support an increased face-to-face activity, improving both internal and external communication.	- New Visual Identity for alumni and development	Director of Communications (DOC)	None	New VI implemented, however, consistency needs to be rolled-out further across Colleges/University – to be completed by Sept 2020	
		- Strategic communications strategy developed, which includes objectives for impact and good news - disseminated across the appropriate communications channels including social media	DOC	None		

- Imodules Implementation (website)	DOC	New alumni web platform is supplied by Encompass SAS system	Full 'soft-launch' implementation schedule in place, commencing with pre-test April '20, including various stakeholder engagement and testing strategies with 'Go-Live' and formal launch of new platform - scheduled for Jan 2021	
- Communications categories/tagging' for a variety of communications objectives, such as, newsletters, events and fundraising appeals, meet GDPR requirements and ensure optimum engagement and buy-in by alumni. Communications categories will be recorded to	DOC	New alumni web platform iModules and RE	April 2020, with implementation review December 2020	

		constituent records on Raisers Edge.			
		- Targeted external Communications including college e-newsletters, supporter, and stewardship communications. In addition disseminate a monthly Alumni e-bulletin	DOC	New alumni web platform iModules	Implementation as per annual communications plan - measure and increase impact/conversion rates via iModules
		- Targeted internal communications including an internal all staff e-newsletter featuring donor impact and alumni engagement stories and metrics.	DOC	None	Implementation as per annual communications plan - measure and increase impact/conversion rates via iModules
		- Ensure the highest quality of fundraising proposals and	DOC	Dependant on design software	Commenced

design to complement the face-to-face donor meetings and engagement.		and team skillset		
- Provide an effective communications service for alumni annual appeals and alumni relations and major gift fundraising	DOC	Alumni Relations, Annual Giving and Major Gift fundraising strategies	Alumni and Development Strategic Plan to be developed – Drafted by July 2020 – September 2020	
- Formalise a communications process and structure for all alumni and development communications	DOC		Creation of Standard Operating Procedures for all communications processes and procedures being developed – completion June 2020	
- Formalise a policy managing social media content and governance across departmental channels, as well as the community	DOC	iModules web platform	Creation of process map for communications in Alumni and Development, including acceptable use	

		channel on iModules			policy and procedures for content dissemination – completion June 2020	

Signed: _Patrick O'Shea_

Prof. Patrick G. O'Shea, President