SCOT Analysis

The analysis should use bullet points with one-two sentence descriptions of each point, with the goal of limiting the document to two pages. It is understood that a more substantial document may be prepared within the unit, but the formal submission should adhere to these guidelines.

The deadline for submission to the Provost’s Office is January 17, 2017.

Unit

University Advancement

Year

2017-2018

Strengths:

• **Successful Campaign.** The Western Stands for Washington Campaign surpassed its stretch goal and was a point of pride for the entire campus indicating that Western is indeed worthy of philanthropic support.

• **Impact on the University.** UA makes a positive and lasting impact on the University from both a financial and reputational basis.

• **Visibility.** Continued UA marketing and outreach efforts have supported the University goal of increased awareness of Western beyond its traditional Bellingham stronghold, into the south Puget Sound region.

• **Goals, Metrics and Transparency.** The division is very goal and metric driven, especially internally, and strives to communicate achievement of those goals throughout campus.

• **Donor Data.** Our donor data is a valuable asset and is maintained with great concern for its quality and consistency.

• **Strong Campus Relationships.** The relationships UA is building with campus partners are increasingly valuable as the collaboration allows for better opportunities to connect potential donors with great projects on campus.

• **Good Working Environment.** UA attracts mission-driven people who are collaborative, creative and committed to advancing the University. The team prides itself on being caring, solution driven and good communicators. Leadership provides positive reinforcement for successes. And while they work hard, they also support and value a healthy work/life balance, which includes an emphasis on wellness and professional development.

• **Committed to Building a Culture of Philanthropy.** UA has robust student involvement through interns, employees and ambassadors all of whom experience the division working toward philanthropic success.

• **Volunteer Boards.** The Foundation, Alumni Association and college advisory boards are all evolving, providing more bandwidth for connecting with additional community supporters.
Challenges:

- **Technology.** The systems we rely on for gift, donor and database management are based on old platforms and technologies. We need a migration plan toward a new advancement system that provides greater access to data from an analytical, reporting and customer relationship management basis.

- **Website.** Our website(s) are hosted by a third party that does not provide sufficient flexibility for us to rapidly update. Need to move quickly to a more flexible platform.

- **Engagement with Constituents.** Our ability to engage with alumni and donors continues to be challenging. We do not have a campus-wide integrated engagement system that captures and tracks all the ways our constituents engage with our University.

- **Student experience as it relates to alumni experience.** Our campus turns over students to the Alumni Association as they walk across the commencement stage. Yet many do not have jobs and may not have had an internship. We need to explore how Western can continue to support young alumni in their career searches so that students’ attitudes stay positive and they stay engaged.

- **Space.** University Advancement is a small unit, but people are spread across 5 different locations, excluding our major gift officers that are embedded in their colleges. This creates challenges in collaboration and integration of the division.

- **New Sources of Revenues.** UA must diversify its sources of revenue in order to support its mission. There is currently too much reliance on market returns to provide revenue.

- **Functional Bottlenecks and Vulnerabilities.** Similar to data access, some functions are highly dependent on functional experts, which can limit throughput during high volume periods, and leave us vulnerable in the event a functional expert leaves the division.

- **Scholarships.** New scholarships continue to be needed, especially for recruitment and for Compass to Campus students who are now seniors in high school. This will require resources and structure to focus specifically on these types of scholarships.

- **Staffing for the Next Campaign.** Current staffing levels are not sufficient to reach the next level of campaign fundraising. We will need to add headcount to provide

- **Pressure.** Our culture is to always say yes to every request, often to our staff’s detriment. We do not have a way to prioritize requests and sometimes tactfully say no, when our own perception is to create more value and positive reputation for our division.

Opportunities:

- **Growing Reputation of Western.** Great academics, athletics, arts, etc. grow Western’s reputation as a first-rate institution, making it easier to attract new supporters.

- **Great Product.** Western students are special. They (and their parents) continue to love Western well after they have graduated

- **Great Leaders.** New president, deans and other academic leadership provide fresh ideas that gift staff can capitalize upon.

- **Strategic Plan:** The next strategic plan will provide the core goals for the next campaign. The process of gathering input and writing the plan will allow Advancement the opportunity to engage many key constituencies.
• **New Construction.** The Carver Academic Renovation will create campus excitement which hopefully will translate into more fundraising opportunities.

• **Exciting technology possibilities:** Technology is changing the face of fundraising in dramatic ways. We must leverage these new tools to speed up our time to success.

**Threats:**

• **Competition.** There are many more niche not-for-profits that are competing for the philanthropic dollar. Donors have many more options to choose from. And the technology tools used by these NFP’s are relatively cheap and easy to implement. Small NFPs present to the outside world the same as large ones. Differentiation becomes more important than ever.

• **Historical Ways of Engagement.** The tried and true ways of connecting with donors are changing dramatically. Landlines and direct mail are no longer the way many of our constituents receive their communications.

• **Compensation and Employee Turnover.** Advancement staff, especially experienced major gift officers are in high demand across the country. Fortunately, Bellingham is a desirable place to live, but If Western falls too far behind the curve in compensation, we risk losing good people with valuable experience and institutional knowledge.

• **Campus Accessibility.** Guest parking and easy accessibility are vital to develop better engagement with our constituents.

• **Presence in the Local Community.** Western is known locally by those with an affinity for the institution, but the general population of Bellingham and Whatcom County is still generally unaware of the value it provides to the community.