BOARD OF REGENTS MEETING

Advancement 3.0

INFORMATION

This item is for information only.

BACKGROUND

EXECUTIVE SUMMARY

At the request of President Cauce, University Advancement’s Executive Leadership Team (ELT) undertook a process (dubbed “Advancement 3.0”) to position Advancement to be of even greater and deeper service to the University. The timing of the President’s request was by design, as we entered the final years of the Be Boundless campaign, codified the structure of our integrated model, and prepared for a leadership transition in University Advancement in the summer of 2019. We recognize the value of an Advancement strategic plan to cement the program’s strengths and best practices, guide us through a period of rapid change and to position us to best support the University’s mission and aspirations in the coming years. We are eager to discuss our ideas and the questions they have catalyzed with you.

MISSION OF ADVANCEMENT

Our mission in University Advancement is to advance the UW’s impact. We do this in three ways:

1. *Enhancing and protecting the University’s reputation*

   We advance stakeholder and public understanding of the University’s impact and engage people meaningfully in supporting its mission. This work occurs...
in a variety of ways, including but not limited to storytelling, multi-channel marketing, trademark protection and issues management, broad-based engagement, volunteer advocacy, and individual communication.

2. **Facilitating resources**

Advancement drives a wide range of resources to the University. These include private support (gifts and private grants), sponsorship and trademarks and licensing revenue, gifts-in-kind (e.g. software, print, airtime), state funding (through legislative advocacy), tuition revenue (shaping prospective and current student attitudes, driving applications and yield), and volunteer time (mentors, speakers, internship placements, social media ambassadors).

3. **Supporting community building and service**

We support the UW’s public mission and values by building broad community and public support with an intentional focus on deepening authentic relationships with stakeholders one-on-one and at scale. We do this through our engagement strategies, communications, and the embodiment of our public service mission – both inside and outside of the University.

We depict our mission as a star by design. It is our “north star” and guides every aspect of our work.

**KEY STRATEGIES**

There are five keys that enable us to accomplish our mission of advancing the UW’s impact:

1. **Our People**

   Advancement is all about people. We are in the relationship business, both inside and outside the University. Our team members are fundamental to our success. We hire bright, hardworking, caring people who embrace our values and provide a diverse range of backgrounds, perspectives and talents, and nurture their personal and professional growth and development – optimizing their effectiveness and thereby the organization’s.

2. **Integrated Advancement**

   UW Advancement exemplifies a model approach, integrating the disciplines of Alumni and Stakeholder Engagement, Development, and Marketing and Communications in one strategic approach supported by a robust Advancement Operations infrastructure. This is exemplified by strong, multi-faceted partnerships in all directions – between University-wide advancement functions and school/college/campus (“unit”) advancement teams, between two or more units, between advancement and other administrative areas, and between the University and external partners. Our motto, “one team, one plan” is driven by a belief that through integration and collaboration, we can maximize our ability to best support the University.
3. **Profound Engagement**  
   At their core, the UW and University Advancement strive to sustain authentic, committed relationships leading to actions that enhance the University’s mission. While all engagement has inherent value, our goal is to drive *profound* engagement – experiences that trigger deep emotional reactions, which are drivers of significant action and investment.

4. **Bold Innovation**  
   Bold innovation is about unleashing the creative thinking of our team organically by enabling and empowering positive change and novel approaches. We make it okay to try, fail fast, and move forward without fear of failing again. Bold innovation happens in inclusive, collaborative spaces (not silos), and is about creating, testing, and adopting best practices.

5. **Institutional Alignment**  
   University Advancement is in service to the institution. We laminate to and help influence University and unit priorities to maximize their impact on behalf of the public we serve. Institutional Alignment represents the largest opportunity for significant growth in reputation, resources, and community building and service. It requires a deep partnership between Advancement and institutional leadership to ensure that Advancement is aligning its work in greatest service to leadership-identified priorities, both University and unit-based.

   Our constituency-based University partnership model is built to support unit priorities. It is the bedrock of our success, and must be maintained. At the same time, opportunities to catapult the institution to the next level of impact sit across and between academic units. From the complexity of the world’s problems to younger generations of donors who care about “causes” more than the UW’s organizational structure, we will capitalize on our largest opportunities when we are able – as an institution – to rally around a handful of priorities/initiatives in addition to (and without diminishing support for) school/college/campus-specific priorities. We believe there is an additive opportunity here, one that – if realized fully – could be the most important work we do to position the University well as a significant partner for the next generation of philanthropists. Conversations about interdisciplinary, collaborative work are occurring across the institution. If we can bring them together in a streamlined process that adds value for everyone, we’ll enable the University – and all of its parts – to make the jump to the next level in reputation, resources…and impact.
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Advancement History: The Path to 3.0

Advancement 1.0 at the UW preceded most of us: it was the foundational work of our predecessors to establish public advocacy for public higher education, primarily through the work of the UW Alumni Association, and an early fundraising model (including the institution’s first campaign) that established philanthropic relationships between alumni and friends and the UW – many of which continue today. Advancement 2.0 began with the establishment of the centralized-decentralized partnership with UW units nearly 20 years ago, the integration of the UWAA and broad-based engagement, and five years ago, the full integration of marketing and communications to laminate our organization’s work squarely to the UW’s institutional strategy. It also included Campaign UW (2000-2008) and the current Be Boundless campaign.

Advancement 3.0 is our opportunity to look toward the future and develop a smart strategy that will drive our next leap forward. We believe this is transformative work that will build on the tremendous strengths of our Advancement program and enable our teams to have an even greater impact on behalf of the UW. We know the institution’s expectations are high and that our advancement colleagues at our peers across the country are watching us closely – as the UW goes, so goes our large public peers, so we are mindful of the stakes and of ensuring our north...
star, our work on behalf of this great public institution, stays in step with both the University’s opportunities and challenges and the stakeholders we serve.

BACKGROUND RESEARCH:
WHAT INFORMED THE SHAPE OF ADVANCEMENT 3.0

Stakeholder Survey
To understand our current baseline, we surveyed key stakeholders: the University Advancement Team, Board of Deans and Chancellors (BoDC), President’s Cabinet, UW Foundation Board, and UWAA Trustees. We wanted to know, in terms of University Advancement:

- what is working well;
- what could be better;
- what opportunities they saw; and
- what the risks are if we did not embrace those opportunities.

What is working well:

When asked what was working well, different themes rose to the top for each stakeholder group. The Advancement team called out the integrated advancement model, training and development (for staff), open cultivation, and our culture/fostering collaboration. ELT, for which results were analyzed separately, noted Advancement culture as critical to maintain. University leadership (BoDC and Cabinet), called out the unit/central partnership model and the University brand/messaging as working well. Volunteers highlighted fundraising success in addition to themes that rose across the other stakeholder groups: brand/communication, genuine relationships, and the Integrated Advancement model.

What could be better:

In terms of what could be improved, results similarly varied by stakeholder group. The Advancement team called out internal communication, along with integration (they expect integrated advancement and note when they don’t see it) and hiring/onboarding/promotion processes. University leadership noted interdisciplinary/University-wide fundraising initiatives, unit/central messaging alignment, more communication and stewardship, and more even distribution of support and resources to units. Volunteers wanted the UW to tell its story even more.

Opportunities:

In identifying critical opportunities for University Advancement to embrace in the next several years, all categories of stakeholders agreed: Our biggest
opportunities are embracing and implementing new technology and cultivating and growing the next generation of philanthropists, stakeholders, and advocates.

Risks:

There also was consensus around the primary risks if we remain status quo: a decrease in private support and the loss of relevance of the University to our communities.

National Trends

To inform our thinking about the future, we researched trends in both higher education and philanthropy. One significant trend that stood out was the difference between younger and older donors. Younger donors care about “causes” and are eager to invest in organizations who are solving the problems they care about, such as health disparities, homelessness, or global warming. They are much less inclined than previous generations to give out of loyalty or affiliation. Paired with dramatic growth in the number of non-profit organizations, we face a landscape where donors will support the organization that is creating the change they want to see in the world – not necessarily just the one they earned a degree from.

This is not the end of alumni loyalty, but it is a significant opportunity to engage a wide swath of new donors who may or may not have current affiliations with the University. While these younger donors are not yet our most generous, they will be. The greatest wealth transfer to date is about to take place between Baby Boomers and Gen X/Millennials. Our peer institutions recognize this shifting landscape and are actively working to capitalize on it. To date, none would say that they’ve found the model or solution.

Growth in the use of technology is another significant trend. As technology becomes ubiquitous, stakeholders expect personalized communication tailored to their interests, convenient interfaces, and dynamic, compelling content.

These trends exist in an era of eroding trust in institutions, public questioning of the value of higher education, decreasing state support for higher ed, and increasing enrollment at four-year institutions, and demand for many areas of study that far exceeds capacity.