

# **FY19-20 ANNUAL ROI REPORT**



UNIVERSITY ADVANCEMENT

November 10, 2020



University Advancement's Annual Return on Investment (ROI) Report reflects a holistic, university-wide approach that strategically deploys development, marketing and communications, and alumni and stakeholder engagement together in support of the University of Washington and its impact on Washington and the world. Consistent with the University's organizational structure for Advancement, this report describes UW Advancement expenditures for both constituency units and university-wide services for FY19-20, as well as private support distributed to units based on donor designations.

The results of FY19-20 point to Advancement's continued success in advancing the mission of the University of Washington, despite the challenging COVID-19 environment. As the Year-Over-Year ROI chart demonstrates, gifts and grants have trended upward over time, reaching \$778M in FY20. All in, 58% of Advancement spending is in the units (schools/colleges/campuses); 42% is in university-wide programs where specialized expertise (e.g., Planned Giving) and universally utilized services (e.g., Gift Processing, University Photography) or core programs (UW News; internal and external strategic communications and events) are provided.

The ability of Advancement to continue to outperform, in an increasingly challenging and uncertain environment, validates the effectiveness of our integrated approach and the significant efficiencies that are gained. Over the last five years, for each dollar spent, we raised an average of \$7.67—a 40% higher return on investment than our peers. This positive trend is the result of UW's continued investment in Advancement and its bright, hardworking, and kind people.

The return on investment is calculated by dividing the numerator, which consists of gifts and private grants, by the denominator of total costs. Pledges, bequests, and endowment distributions are not included in the calculation.

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**Page 4: FY19-20 Advancement Return on Investment:** includes FY19-20 total costs, gifts and private grants received, and one-year and five-year ROI averages.

**Page 6: Year-Over-Year Advancement ROI:** describes ROI performance over the campaign period.

**Page 7: FY19-20 Funding & Costs for Advancement Activities:** the first pie chart shows the distribution of funded costs between central and constituency units. The second pie chart shows the distribution of costs between university-wide services and constituency units.

# FY19-20 ADVANCEMENT RETURN ON INVESTMENT Summary

**1-Year ROI/Dollar Spent                    \$8.70**

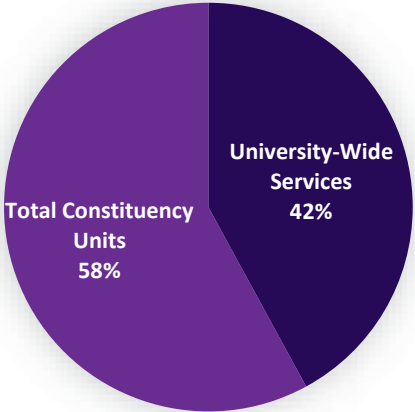
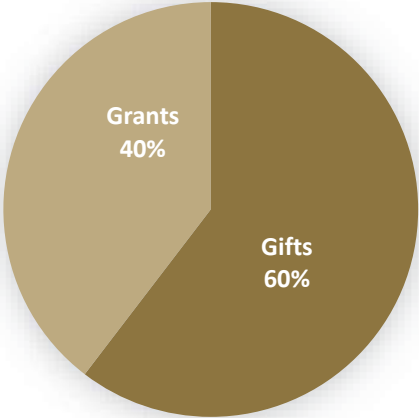
**5-Year Avg. ROI/Dollar Spent            \$7.67**

**FY20 Return**

Gifts	\$	470,004,246	60%
Grants		308,216,762	40%
<b>Total Progress</b>	<b>\$</b>	<b>778,221,008</b>	<b>100%</b>

**FY20 Costs**

University-Wide Services	\$	37,619,399	42%
Total Constituency Units		51,820,190	58%
<b>Total Costs</b>	<b>\$</b>	<b>89,439,589</b>	<b>100%</b>



*Note: The return on investment is calculated by dividing the numerator, which consists of gifts and private grants, by total costs. Pledges, bequests, and endowment distributions are not included in the calculation.*

# FY19-20 ADVANCEMENT RETURN ON INVESTMENT

Constituency Units	Costs	Gifts	Grants	Total Gifts & Grants	1-Year ROI/Dollar Spent	5-Year Avg. ROI/Dollar Spent	1-Year Cost/Dollar Raised	5-Year Avg. Cost/Dollar Raised	Endowment Distribution	Total Gifts & Grants	Total Gifts, Grants & Endowment Distribution
Academic Student Affairs <sup>1</sup>	1,999,876	12,854,949	3,833,667	16,688,615	8.34	9.30	0.12	0.12	10,771,380	16,688,615	27,459,995
Arts and Sciences	7,025,120	30,747,906	18,009,883	48,757,789	6.94	9.92	0.14	0.11	17,666,985	48,757,789	66,424,774
Broadcast Services <sup>2</sup>	5,427,264	15,946,966	-	15,946,966	2.94	4.44	0.34	0.24	3,016	15,946,966	15,949,982
Built Environments	603,457	2,989,762	374,500	3,364,262	5.57	7.91	0.18	0.14	1,756,837	3,364,262	5,121,099
Dentistry	656,971	3,414,745	510,186	3,924,931	5.97	5.95	0.17	0.18	1,326,245	3,924,931	5,251,176
Education	1,129,017	4,888,507	9,197,030	14,085,537	12.48	10.67	0.08	0.10	1,101,012	14,085,537	15,186,549
Engineering	5,396,483	37,973,632	11,341,934	49,315,566	9.14	11.08	0.11	0.10	11,249,980	49,315,566	60,565,546
Environment	1,944,425	7,684,302	30,448,726	38,133,029	19.61	19.34	0.05	0.05	4,305,093	38,133,029	42,438,121
Evans School of Pub. Policy & Gov.	608,655	2,353,070	7,996,449	10,349,519	17.00	14.17	0.06	0.09	882,561	10,349,519	11,232,080
Foster School of Business	2,325,409	20,463,540	-	20,463,540	8.80	8.05	0.11	0.13	7,511,632	20,463,540	27,975,172
Information School	701,215	1,114,867	3,388,543	4,503,410	6.42	10.97	0.16	0.15	311,426	4,503,410	4,814,836
Intercollegiate Athletics	1,984,490	33,669,566	-	33,669,566	16.97	17.26	0.06	0.06	3,876,346	33,669,566	37,545,912
Law	1,094,558	1,838,484	1,000,000	2,838,484	2.59	4.41	0.39	0.25	4,288,542	2,838,484	7,127,026
Libraries	533,327	2,487,863	1,058,485	3,546,347	6.65	3.78	0.15	0.30	2,200,839	3,546,347	5,747,186
Nursing	481,702	1,108,505	5,443,081	6,551,586	13.60	8.96	0.07	0.12	2,082,486	6,551,586	8,634,071
Pharmacy	499,863	2,784,536	9,994,307	12,778,843	25.56	14.20	0.04	0.08	1,049,398	12,778,843	13,828,241
Public Health	537,530	63,747,772	23,244,842	86,992,613	161.84	97.28	0.01	0.01	868,590	86,992,613	87,861,203
Social Work	787,989	4,813,888	2,070,059	6,883,947	8.74	12.89	0.11	0.12	1,160,210	6,883,947	8,044,157
UW Bothell	1,587,475	2,029,903	3,088,944	5,118,847	3.22	3.11	0.31	0.37	187,890	5,118,847	5,306,737
UW Medicine	9,973,401	203,008,280	173,331,121	376,339,401	37.73	26.48	0.03	0.04	29,875,532	376,339,401	406,214,934
UW Tacoma	1,280,528	4,722,811	39,346	4,762,157	3.72	3.55	0.27	0.30	1,796,711	4,762,157	6,558,869
Other Constituencies <sup>3</sup>	5,241,435	9,360,392	3,845,659	13,206,051	2.52	na	0.40	na	6,519,581	13,206,051	19,725,632
<b>Total Constituency Units<sup>4</sup></b>	<b>51,820,190</b>	<b>470,004,246</b>	<b>308,216,762</b>	<b>778,221,008</b>	<b>15.02</b>	<b>13.16</b>	<b>0.07</b>	<b>0.08</b>	<b>110,792,291</b>	<b>778,221,008</b>	<b>889,013,299</b>
University-wide Services <sup>5,6</sup>	37,619,399	-	-	-	na	na	na	na	-	-	-
Other Distributions <sup>7</sup>	na	na	na	na	na	na	na	na	24,078,300	-	24,078,300
<b>TOTAL<sup>8,9</sup></b>	<b>89,439,589</b>	<b>470,004,246</b>	<b>308,216,762</b>	<b>778,221,008</b>	<b>8.70</b>	<b>7.67</b>	<b>0.11</b>	<b>0.13</b>	<b>134,870,591</b>	<b>778,221,008</b>	<b>913,091,599</b>

**Notes on Costs, Gifts, Grants and Endowment Distributions**

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<sup>1</sup> Academic Student Affairs (ASA) includes: Office of the Provost, Graduate School, Office of Minority Affairs & Diversity, Scholarships & Student Life, and Undergraduate Academic Affairs.

<sup>2</sup> Broadcast Services category includes KUOW and KEXP.

<sup>3</sup> Other Constituencies includes: UW Alumni Association, President's Funds, GIX/CoMotion, and other University support. Subgroups within this category may change year over year, so there is not a five-year average.

<sup>4</sup> Total Constituency Units Cost detail (please refer to the pie chart on page 7):

Unit Funded	24,602,961	47%
Central Advancement Funded	27,217,229	53%
Total Constituency Units' Costs:	51,820,190	

<sup>5</sup> University-wide Services category includes: Development, Advancement Operations (People and Culture, Finance & Administration, Information Management, and Gift Services), Campaign, Corporate & Foundation Relations, Regional Advancement, UA Senior Vice President's Office, University Marketing & Communications (excludes Sponsorships and Trademarks & Licensing), and UW Foundation Support.

<sup>6</sup> Bowl Game expenses are reported net of revenue (\$11,645). The CRM project expenses are included (\$1,166,531).

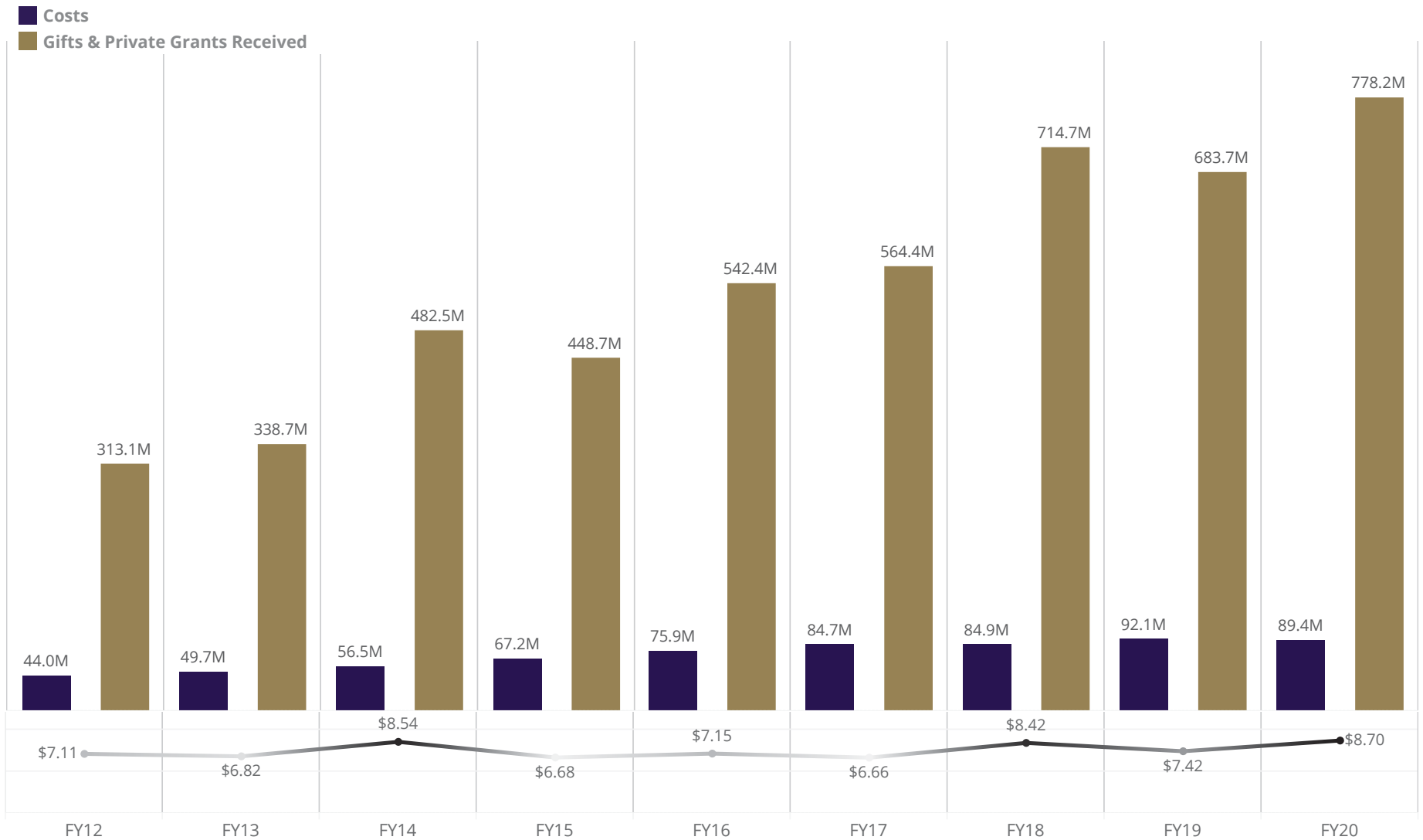
<sup>7</sup> Other Distributions are gifts invested in the CEF that are not associated with any Endowment including IF Long-Term Pool.

<sup>8</sup> Total Costs detail (please refer to the pie chart on page 7):

Unit Funded	24,602,961	28%
Central Advancement Funded	64,836,628	72%
Total Costs:	89,439,589	

<sup>9</sup> The total five-year averages are calculated from FY15-16 through FY19-20.

# YEAR-OVER-YEAR ADVANCEMENT ROI



## ROI 5-Year Average

**UW Advancement (FY16-FY20): \$7.67**

**Peers (FY15-FY19): \$5.48**

Note: ROI based on cash received (Gifts + Private Grants).

## FY19-20 Funding & Costs for Advancement Activities

