

## UNIVERSITY of WASHINGTON

FY2020 Annual Review Narrative Response for: **215 - Advancement**Programmatic & Academic Vitality Narrative

- 1) Please briefly describe your unit's annual internal budget development process. *Question Type: Free Text, Word Limit: 500, Required For: All Units*

University Advancement's (UA) collaborative planning and budgeting process encompasses participation from stakeholders across Advancement: UA Leadership, UA Chief Budget Officer (CBO) and Finance team, UA HR, University Marketing & Communications, Development, Alumni & Stakeholder Engagement, and college, school, and division Advancement Units and Departments (budget managers).

The process is briefly outlined below. Please see the "Planning & Budgeting Timeline" that was shared with OPB earlier in the fiscal year (no option to attach file).

- Step 1. UA Leadership communicates key strategies Advancement-wide (Winter)
- Step 2. UA budget managers create a high-level summary of their key strategies aligned with UA and unit strategies (February-March)
- Step 3. UA budget managers submit budget proposals and high-level summary to the UA CBO and Finance (April)
- Step 4. UA CBO & Finance analyzes funding sources and planned expenditures (May & June)
- Step 5. UA CBO presents budget recommendation to UA Leadership
- Step 6. Budget managers are notified of approved budget changes (June-July)

- 2) What are 3-5 key elements of your unit's current strategic plan? *Question Type: Free Text, Word Limit: 500, Required For: All Units*

Advancement's strategic plan (Advancement 3.0) is built around its mission of advancing the UW's impact. We do this by enhancing and protecting the reputation of the institution, building public understanding, advocates and ambassadors, securing private financial resources to support University and unit priorities, supporting other critical resource streams, such as student recruitment and legislative strategies, and fully implementing the UW's public service ethos in every stakeholder engagement. Key strategic elements:

- Further refine and operationalize the Integrated Advancement model.
- Continue to leverage momentum in the Be Boundless campaign, securing private financial support for University and unit priorities, engaging stakeholders, and communicating the UW's impact.
- Maintain focus on engagement of staff, faculty, students, donors, volunteers, and other stakeholders, by providing superior service, developing deep relationships, and building loyalty to UW, individually and at scale.
- Sustain an environment that enables novel approaches and empowers bold innovation.
- Continue to align all university communications and marketing in a cohesive strategy and program and, working with University leadership, begin a five-year review of the UW's current positioning.

- 3) What major obstacles or institutional barriers currently do, or likely will, hinder execution of your strategic plan? What are you doing to address these challenges? *Question Type: Free Text, Word Limit: 500, Required For: All Units*

A few factors hinder execution of our plan, and we are monitoring additional, potential hurdles.

- Decanal orientation and lack of accountability of deans and therefore advancement officers to central priorities hinders alignment with select university-wide initiatives, e.g., fundraising priorities, etc. and prioritization of resources.
- Best staff hired away because of competitive compensation or campaign success.
- Budget constraints due to the CEF reduction / gift assessment revenue uncertainty.
- Difficult to secure additional resources to execute significant opportunities to raise the visibility and stature of the UW (i.e., Admitted Student Preview enhancements, Visitor Experience, Population Health). Although Advancement always seeks to align UW priorities and donors' preferences, sometimes that is difficult. For



UNIVERSITY of WASHINGTON

FY2020 Annual Review Narrative Response for: 215 - Advancement

Programmatic & Academic Vitality Narrative

example, raising scholarship dollars will have significant donor interest, whereas raising money, say, for Financial Transformation or deferred maintenance, will have little to none.

- 4) Over the next year, could any of your planned strategic activities result in material changes to revenues or expenditures, faculty or staff workload, or the student experience within your unit and/or another unit/campus? *Question Type: Free Text, Word Limit: 500, Required For: All Units*

Enterprise-level system: Advancement uses a 20-year-old constituent relationship management (CRM) system. In the near future implementation will begin on a modern system that will enable UA staff, leadership and others to deepen relationships with donors and volunteers, raise more gift and private grant revenue, track metrics and progress better and with more transparency, and increase efficiency. The CRM system implementation will increase expenses by approximately \$2M in the initial two fiscal years and \$800k annually thereafter.

Reputation Building and Alignment Positioning

Research and strategic planning with leadership

A one-time expenditure will be needed to conduct research to maximize the next five to seven years of institutional work / priorities post-fundraising campaign to continue to develop public understanding of the value that the UW provides to our community, state, and the world in a cohesive, consistent way that benefits the full enterprise Investment in nonresident student recruitment marketing (while sustaining in-state efforts) has contributed to the UW’s successful position in California and other select markets. Advancement recommends continuing these efforts to ensure an adequate pool of nonresident students, who have the capacity, pay nonresident tuition. Previously funded with institutional dollars, currently this funding is reallocated from the campaign advertising budget, decreasing marketing for both at recommended levels.

Engagement: The Alumni & Student Programs (ASP) team within UWAA will focus on collaborations with campus units to expand the reach of existing ASP programs (Huskies@Work and Career Treks) and provide opportunities to organize and leverage alumni affinity communities to better serve the networking and career needs of current UW students.

University Initiatives Given the complex, multi-disciplinary nature of issues facing our world and the need for fungible institutional resources to maximize our opportunities to serve students and build excellence across our campuses, we must take advantage of opportunities to grow financial resources by raising private support for a small number of University initiatives in addition to our school / college-based programs. While realizing a University Initiatives process and program will take several years, with a relatively modest investment we could make significant traction around a couple of targeted initiatives now.

Cause-based Giving

Younger donors increasingly affiliate with “causes” as much as with the academic program that granted their degree – or with the University as a whole. In tandem with our school / college-based fundraising, we will provide opportunities for donors to support the broad causes they care about via personalized engagement and solicitations made possible by Marketo and the new CRM, and social media and crowd-sourced campaigns such as Husky Giving Day.

- 5) What is your unit doing to effectively use resources in a way that benefits your unit and/or other units/campuses? *Question Type: Free Text, Word Limit: 500, Required For: UWB, UWT, UWS Administrative Units*

Return on Investment (ROI):

- 1. Advancement continues to be a leader in both private gifts and grants received and ROI:
i. FY18 Stats:



## UNIVERSITY of WASHINGTON

FY2020 Annual Review Narrative Response for: **215 - Advancement**

### Programmatic & Academic Vitality Narrative

1. \$715M received (#2 for public universities)
2. \$7.49 ROI (five-year average, peers \$5.24)
3. \$8.42 ROI (one year)
4. Note: includes expenses for University Marketing & Communications and Alumni & Stakeholder Engagement. Most peers don't include these costs.

ii. Average annual private giving increased from \$325M (FY09–FY13) to \$551M (FY14–FY18).

iii. Although Be Boundless surpassed its \$5B goal, the campaign continues through June 2020, ensuring unit priorities are met and increasing support for institutional priorities.

2. T&L and Sponsorships generate \$1.9M and \$7.7M respectively, contributing to scholarships and programs campus wide and increased visibility for the University. Fundraising success was recently mentioned by Moody's as a contributing factor to UW's exceptional credit quality.

University-wide Services: Advancement's constituency-based model is an industry-leading standard: each unit can focus on its strategic priorities, while receiving university-wide support for its advancement efforts. For FY18, UA funded 71% of the total enterprise-wide advancement activities, with the balance funded by the units.

Enterprise-level systems:

- Cvent
  - Event management system used across UW. In FY18, there were 159 users, 431 events created, with 72,839 registrations processed campus wide.
- Marketo / Digital Channel Management:
  - Marketing automation tool, allowing targeted HTML email content to be assembled in bulk.
    - Creates efficiencies in staff workloads, reducing the need for additional FTEs.
    - Utilized by 400 users across 46 units, including Payroll Services, Enrollment Management, and Executive offices.
    - From launch (Sept 2017), Marketo sent 59.6M emails (30% open rate, peer 24%; 7.7% interaction rate, peer 2.6%).
  - CRM Will revolutionize the way the University engages with donors, volunteers, and stakeholders, resulting in deeper relationships and greater giving.
- Reputation Building and Alignment:
  - Leads cross-functional internal communications team and produces communications for the president and provost. Produces UW Insider.
  - UW News serves upper campus and works collaboratively with Tacoma, Bothell, and UW Medicine to distribute research and administrative news locally and globally. Produces UW Today.
  - Provides programs and services that enhance the UW student experience and increase the engagement of donors / alumni.
  - Development and execution of the University-wide strategic marketing & communications plan that focuses communications on UW's highest priorities.
  - Development of marketing & communications tools, co-planning, editorial services, event planning, and brand alignment at scale.
  - Protection of UW's trademarks and reputation, including misuse of marks by for-profit entities worldwide.
  - Leads issues management, crisis communication process for UW enterprise, as well as media training for leadership, faculty, and staff.



UNIVERSITY of WASHINGTON

FY2020 Annual Review Narrative Response for: **215 - Advancement**

Programmatic & Academic Vitality Narrative

- Develops and implements programs and services, strengthening relationships between UW and its diverse stakeholders.
- Coordinates constituent relationship officers across UW units to ensure alignment, efficiency, and effectiveness.
- Produces Columns magazine, reaching alumni and friends of UW (250,000 households).
- Produces Parents Weekend, W Day, Admitted Student Previews, and consults on or produces dozens of alumni, donor, presidential and constituent and unit events and lectures annually.

6) What are you doing to improve the experience and outcomes of students in your unit? What could the University do to support your efforts? *Question Type: Free Text, Word Limit: 500, Required For: UWB, UWT, UWS Academic Units, UAA, Graduate School*

Not Applicable