



UNIVERSITY of WASHINGTON

FY2021 Annual Review Narrative Survey

Unit Name: University Advancement

Programmatic & Academic Vitality Narratives

- 1) Have you made any changes to your unit's annual budget development process from the response provided last year? If yes, please briefly describe the changes you've made to your unit's annual internal budget development process. If no, please answer with a simple, "no changes." Word Limit: 500**

No changes.

<OPB inserting FY20 response, below>

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) Have you made any changes to your unit's strategic plan in the past year? If yes, what are 3-5 key elements of your unit's new/revised strategic plan? If no, please comment on the progress you've made in 3-5 key areas of your strategic plan. Word Limit: 500**

No. Our Advancement 3.0 strategic framework remains the same, although in the next year we will focus on:

- 1) Defining and articulating our philosophy and building systems in support of profound engagement at scale (including digital engagement) and assessing and calibrating, as necessary the UW's brand strategy for the next five years.
- 2) Ensuring a successful campaign close and, most critically, continued momentum and growth post-campaign.
- 3) Supporting population health and developing a clear pathway with deans and leadership for this and other university initiatives to fully develop.
- 4) Assessing our organization's functions and staffing to ensure we are maximized for effectiveness against University goals and expectations for a fully integrated program that continues to grow philanthropy, community engagement, and the UW's reputation over the long-term.
- 5) Retaining staff (providing professional development for managers and leaders, creating a culture of equity and inclusion, revamping talent review system, and developing compensation strategy and process).

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Our progress is clear: in FY11, the number of donors was 113K contributing \$335M, in FY19, 142K donors contributed \$684M; strong positioning work and reputation development, in-state and nationally through strategic communications and marketing that is measured annually and that supports the University's values and aspirations across all strategies, in Advancement and institution-wide.

- 3) What major obstacles or institutional barriers currently do, or will, hinder execution of your strategic plan? What are you doing to address these challenges? If no changes from your response to either component of this question from last year, please answer "no changes":** *Word Limit: 250*

In addition to our responses last year, other obstacles or barriers are:

- Current use/interest equates to nearly 25% of Advancement's revenue. Schools and colleges spending down their unspent gift funds in a significant way will have a major impact on Advancement's budget.
- The challenge of recruiting and retaining exceptional staff continues to escalate due to competitive pressures and campaign success. As mentioned, Advancement will provide professional development, revamp the talent review system, review and address compensation where appropriate, and explore work/life balance offerings.
- Compensation costs are increasing at a higher rate than revenue from all Advancement revenue sources (CEF, gift assessment, university allocations, current-use interest).

- 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/campus and/or another unit/campus?** *Word Limit: 500*

Reputation Building and Alignment

- Brand calibration: positioning research and strategic planning with leadership:
 - Conducting research to maximize the next five to seven years of institutional work/priorities post-fundraising campaign.
 - Ensure continued development of 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.
- Increased investment in nonresident student recruitment marketing (while sustaining in-state efforts)
 - Augmented efforts are needed as we are facing increased competition and changing demographic conditions, across our primary target markets, including California
 - The United States' diminishing reputation internationally among students and families in key markets and access challenges together are having an adverse effect on interest from international students at the UW and nationwide.
 - Advancement plays a significant role in these efforts and recommends additional marketing investments (being requested through Enrollment Management/Admissions) to ensure an adequate pool of nonresident students, who have the capacity to pay nonresident tuition.

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Engagement

The Alumni & Student Programs (ASP) team within UWAA will continue to expand collaborations with campus units (Huskies@Work, Career Treks, and Dinners with the Pack) and provide opportunities to organize and leverage alumni affinity communities to better serve the networking and career needs of current UW students.

CRM and Digital Engagement

Work continues on the CRM implementation, which the UW began investing in last year. As noted, our team is developing a full digital engagement strategy to maximize CRM and the UW's investment in enterprise marketing systems. This includes a look at the staffing and structures we need to have a digital analytics team that fully serves the University's engagement and marketing strategy. Our future community leaders, philanthropists, and voices of influence on behalf of the University will be discovered and their relationships deepened based on a sophisticated, broad engagement strategy, and we need to build the robust analytics talent and framework to fully deploy that strategy for the UW over the next 10 years.

5) What is your unit doing to effectively use or redeploy resources in a way that benefits your unit/campus and/or other units/campuses? *Word Limit: 500*

Advancement continues to lead in both private gifts and grants received and ROI:

- FY19 Stats:
 - o \$684M received
 - o \$7.27 ROI (five-year average, peers \$5.40)
 - o \$7.42 ROI (one year)
- Average annual private giving increased from \$325M (FY09 – FY13) to \$591M (FY15 - FY19).
- Although Be Boundless surpassed its \$5B goal, the campaign continues through June 2020, ensuring unit priorities are met and increasing support for institutional priorities.

T&L and Sponsorships generate \$2.2M and \$8.6M respectively, contributing to scholarships and programs campus-wide and increased visibility for the University.

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 FY19, UA funded 71% of the total enterprise-wide advancement activities equating to \$65M, of which \$22M funds salaries, benefits, and operating costs across campus in schools/colleges.

Strategic Communications and Engagement, Reputation Development, and Brand Management:

- o Manage enterprise-level systems:
 - Cvent
 - o Event management system used across UW. During FY19, 84,126 registrations were processed.
 - o Merchant Services leveraged Advancement's volume to negotiate better terms for the entire university.
 - Marketo/Digital Channel Management:



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- Marketing automation tool that increases engagement, while creating efficiencies that reduce the need for additional FTEs.
 - During FY19, Marketo sent 38.7M emails out of the core instance (donors, alumni, friends, etc.)
 - Marketo sent 18.2M emails out of the Internal Communications Instance (current staff, student, faculty)
 - Launched the Admissions Instance to target potential undergrads in September 2019. Integrated with efforts by the College of Arts and Sciences.
- Development and execution of the University-wide strategic marketing & communications plan that focuses communications on UW's highest priorities and facilitates unit alignment.
- Cross-functional internal and executive communications team produces communications for the president, provost, and other University leaders. Produces UW Insider and strategic campaigns around priority initiatives, such as Climate Survey, Population Health, Race and Equity.
- UW News serves upper campus leadership and faculty and works collaboratively with Tacoma, Bothell, and UW Medicine to distribute research and administrative news locally and globally. Produces UW Today, UW News Scan, and Morning News Digest for leadership.
- UWAA and UMAC provide and collaborate with units on programs and services that enhance the UW student experience and increase the engagement of donors/alumni.
- Provide marketing & communications tools, co-planning, editorial services, event planning, and brand alignment at scale, such as Sprinklr, an enterprise-wide social media analytics platform that improves the customer experience.
- Protection of UW's trademarks and reputation, including misuse of marks by for-profit entities worldwide.
- Leads issues management and crisis communication process for UW enterprise, as well as media training for leadership, faculty, and staff.
- Coordinates constituent relationship officers across UW units to ensure alignment, efficiency, and effectiveness.
- Produces the *University of Washington 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) For UW student facing units, what are you doing to improve the experience and outcomes of students on your campus or in your unit? What could the University do to support your efforts? *Word Limit: 500, Leave blank if N/A*

University Advancement spearheads many initiatives that improve the experience and outcome for students including raising funds for student programs and scholarships, engaging students through UWAA programming, and working with Admissions and the University to facilitate and better the student experience from application through graduation, which includes defining pathways to majors and programs that support student success. Further, ASE and UMAC support all dimensions of student life, including defining the Husky Experience and promoting it through myriad communications and programming.

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Please see the chart below for FY19 funds raised for student support:

ANNUAL PROGRESS BY PURPOSE

	Current Use	Endowment	Grand Total
Capital	\$40,546,274	\$5,140,779	\$45,687,053
Excellence Funds	\$47,157,784	\$47,698,954	\$94,856,738
Faculty Support	\$280,003,579	\$24,065,932	\$304,069,511
Program Support for Faculty and Students	\$155,591,678	\$27,856,737	\$183,448,415
Student Support	\$15,648,477	\$40,017,101	\$55,665,578
Grand Total	\$538,947,792	\$144,779,503	\$683,727,295