



UNIVERSITY of WASHINGTON

FY2024 Operating Budget Development Narrative Prompts

[Advancement]

Section 1: Programmatic & Academic Vitality Narratives

Text submitted within this section **will** be published to OPB's Annual Budget Development website

Where possible, you are encouraged to leverage published materials already created

- 1) Please briefly summarize your unit's/campus's strategic plan and how your FY24 operating budget proposal (as submitted in Workday Adaptive Planning) connects to your campus/unit strategic plan. *Word Limit: 500*

University Advancement (UA)'s strategic plan is based on the following **Five-Year Objectives** (*not in priority order*):

1. Build bridges with community, adapting our outreach and culture to support authentic relationships, profound engagement, and true partnerships

FY24 Goals:

- Analysis of volunteer structures
- Identification and cultivation of potential campaign volunteer leadership and lead donors
- Increase segmentation and personalization of marketing and solicitations
- Deepen and strengthen engagement with historically under-served communities
- Continue building out the West Campus/Welcoming Campus identity and Welcome Center fundraising

2. Optimize infrastructure, systems, and processes to maximize effectiveness

FY24 Goals:

- Stabilize and enhance the new CRM (Tandem), including core integrations (FT, HR, Marketo, Cvent)
- Evaluate marketing technologies and tools
- Space planning for central teams
- Comprehensive assessment to identify potential organizational efficiencies and maximize effectiveness
- Implement Development VP reporting restructure

3. Increase private support with a goal of a 40% increase in resources to the UW within five years

FY24 Goals:

- Continue strategic investments in high ROI units and strengthen units with high potential ROI
 - We will request Provost reinvestment funding to support additional UW Medicine Advancement staff to capitalize on opportunities to secure additional private support in the next campaign and expand the Engage grateful patient program
- Increase identification and engagement of potential donors with the capacity to make gifts of \$1M+
- Secure private support above annual projections
- Meld unit visions and University Initiatives into a campaign vision and structure

4. Deepen an advancement culture of shared equity leadership where team members feel a deep sense of belonging and accountability and have opportunities to grow personally and professionally

FY24 Goals:

- Improve and continue implementation of supervisor/management training
- Develop career progression pathways for all roles
- Renew five-year DEIB plan
- Implement mentorship program
- Develop and implement active recruiting and engagement strategy



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5. Elevate the UW's reputation and the understanding of the Husky Experience and key UW strengths with target audiences

FY24 Goals:

- Continue to raise awareness for University initiatives (Population Health, Race and Equity, and Innovation) and emerging initiatives/transformational interdisciplinary efforts (e.g., including climate actions, behavioral health, and careers for the public good), and University priorities such as West Campus and welcoming campus facilities.
- Complete brand renewal, including brand pyramid and creative expression; deploy assets to units
- Determine University marketing and communication KPIs
- Develop externally facing case statements for existing and emerging university initiatives and begin planning for relevant public awareness/outreach efforts
- Ensure understanding and ownership of the brand by UW executive and volunteer leadership

Each fiscal year, UA develops annual goals to drive forward the longer-term objectives to provide focus and alignment for individual, team and unit work plans, positioning UA to achieve the greatest impact for the institution and its stakeholders.

FY24 Operating Budget Proposal:

UA's strategic plan is embedded into our FY24 operating budget proposal through resource allocation decisions. We plan to continue to invest in staff across the institution (in schools/colleges/campuses and centrally) and in operational initiatives, including profound engagement; marketing, research, analytics, and insights; learning and development; and sustainment of the newly implemented CRM (Tandem).

- 2) Building on the responses your campus/unit submitted during the FY23 annual review cycle ([posted here](#)), how has your unit/campus integrated the themes and goals of [the 2022 – 2026 UW Diversity Blueprint](#) into your campus's/unit's ongoing work to take actions towards access, inclusion, and equity? *Word Limit: 750*

UA has established a strong foundation for DEI. We are now driving sustainability in these practices and measuring progress that contributes to our DEI values and strategic plan for embedding equity, diversity and inclusion into our practices, policies and behaviors. In addition, UA has a DEI team of two FTE who work to empower each area of the organization to move toward our goals. Each pillar of the organization has a dedicated group of staff and leaders who set and drive DEI priorities. Along with UA's Equity Council, these groups form a network that ensures progress, acknowledging that this work is permanent and evolutionary and will never be fully completed.

Diversity Blueprint Goals

Investing in the goals of the Diversity Blueprint is a long-term commitment for UA.

GOAL 1: CULTIVATE AN ACCESSIBLE, INCLUSIVE AND EQUITABLE CLIMATE



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- UA has designed and implemented a survey with UWHR, deployed annually, to collect quantitative and qualitative data on UA staff climate relating to DEI.
- UA has developed a number of programs and educational opportunities to support equity and inclusion: *Dare to Lead, Amplify, Employee Resources Groups, Equity Lab (education/training), Elevate (communications group), leadership training for committees and regular trainings for departments throughout the organization customized to their needs.*
- UA has an above-average percentage for contracting with diverse vendors and businesses.
- UA policies and practices are reviewed and priorities are set based on data from surveys and evaluation of our strategic plan dashboard.
- In 2022, we deployed new equity and access best practices to our talent acquisition process.

GOAL 4: ATTRACT AND RETAIN DIVERSE STAFF

The *Hiring with an Equity Lens* toolkit was launched to improve the talent acquisition process within UA. Accessible job descriptions were developed using ungendered language and valuing experiences along with education. The toolkit addresses bias in interviewing, inclusive criteria for screening candidates, and other ways to provide access to diverse candidates.

- UA has created practices to ensure equitable pay across the organization through a midyear compensation review process.
- As a result of our collective efforts, values and hiring best practices, our leadership team is more diverse than it has ever been. This supports our work to retain and support diverse staff.
- Staff performance review documents include a question about their interest and effort in developing an understanding of and/or commitment to DEI.
- In light of SB 5227, UA will set a goal of 100% participation in the training programs developed by the OMA&D. We also plan to provide supplemental training.
- UA's newly launched mentorship program is gaining traction and will be fully operational by the end of FY23.

GOAL 5: DEVELOP PLACE-BASED EDUCATION AND ENGAGEMENT TO ADVANCE ACCESS, INCLUSION, AND EQUITY

Many of our engagement teams have a standard practice of using the University of Washington Land Acknowledgment at the start of programs and large public engagements. It has become a part of UA culture to say the words that bring awareness of the land upon which the UW is situated, as well as lands we utilize when we are working off campus or out of state. To further our efforts to be in a healing relationship with the people whose land we stand on and the land itself, the UA Equity Council is developing a guide to ensure that our language is meaningful and that our actions and engagements honor the history of place. This land acknowledgment guide will be completed and rolled out by early FY24.

GOAL 6: IMPROVE ACCOUNTABILITY AND TRANSPARENCY AT ALL LEVELS

- Our DEI values, strategic plan and dashboard are stated prominently on our website and are shared directly with UA colleagues.
- Our Executive Strategy Team is now engaged in 360-degree annual performance reviews to invite broader input and feedback.



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- UA's equity report will launch in spring FY23 and be updated and released to staff and stakeholders on an annual basis.
- Many of our materials summarize and include findings from our annual DEI survey. The specific results are shared with discretion to protect the anonymity of our participants.



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