



UNIVERSITY of WASHINGTON

FY2025 Operating Budget Development Narrative Prompts

[University Advancement]

Programmatic & Academic Vitality Narrative

*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 provide a web link to your campus/unit strategic framework and provide three to five bullet points outlining the relationship between your resource plan and your strategic framework. *Word Limit: 750*

University Advancement's mission is to grow relationships, resources, and reputation to advance the mission and priorities of the University and improve the lives of the students, patients, communities, state, and world the University serves. Our five-year objectives, available to everyone with a UW Net ID, provide structure and focus for our central and unit-based teams as they advance this work.

University Advancement (UA) faces a complex landscape as we enter FY25. We balance the need to: accelerate fundraising progress to meet the pressing needs of our students and society within a dynamic external and internal landscape, including our community's continued full return to engagement post-COVID restrictions; challenges locally and nationally to our higher education public values within a highly polarized political environment, a lack of access to internal data due to systems transformations, and a historic move to Big Ten athletics. Our work to amplify and resource ambitious academic priorities and mission-critical needs for the University within this landscape requires us to be both efficient, pragmatic, and nimble.

Our objectives address both the long-term goals to fulfill our mission and the current landscape. We bring a strategic, disciplined approach to investments of both time and capital. In FY25 we will:

- Accelerate fundraising as we prepare for the next campaign, continuing strategic investments in fundraising positions (both in campuses/schools/colleges/programs and centrally). This includes endorsing permanent funding for UW Medicine (UWM) positions currently on temporary lines (from the FY24 Provost reinvestment process) and making new investments in additional UWM fundraising positions. Investments in fundraising and the functions that support it are pressing as we cultivate and solicit lead campaign gifts, recruit campaign volunteers, and maximize President Cauce's trusted relationships and standing in the community.
- Advance campaign planning by supporting UW's academic leaders as they both articulate compelling campus/school/college/program visions and priorities, shared values, and priorities common across the institution, and lead multidisciplinary solutions to global and societal challenges (climate, democracy, behavioral health, and AI). Visionary solutions that inspire transformational investments are the bedrock of fundraising and campaign success.
- Initiate and deepen relationships with potential and current stakeholders at scale by continuing to invest technology and marketing resources to facilitate profound engagement across all audiences. We are building a strong marketing, research, and analytics team and strategy thanks to earlier University and University Advancement investments and have the chance to take our work to greater levels of impact this year, progressing toward our comprehensive, long-term plan and deepening our pipeline of major gift donors and University advocates.
- Launch the Boundless brand renewal and invest in communicating the importance of higher education and the UW's impact on people and communities. With academic leadership, develop the compelling University



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narrative for impact in strategic areas (climate, democracy, behavioral health, AI). Supported by our strong institutional brand, targeted messaging will reach both supporters and those who do not yet know the University, across Washington state, the US (including new Big 10 markets), and targeted global locales.

University Advancement Five-Year Objectives with Fiscal-Year Focus:

<https://depts.washington.edu/uwadv/about-advancement/fy-priorities/>

As shown in our FY23 performance, Advancement continues to grow revenue for the University as well as effectively use resources:

- \$625M in private support
\$7.36 ROI (five-year average, FY22 peers \$6.50)

- 2) Please discuss your campus/unit's planned utilization of resources, as identified in your Adaptive entries (institutional initiative = UW Diversity Blueprint), in support of the [2022-2026 UW Diversity Blueprint](#) themes and goals. *Word Limit: 750*

After establishing a solid foundation for diversity, equity, and inclusion (DEI) over the past five years, Advancement (UA) is driving sustainability in these practices and measuring progress that contributes to embedding equity, diversity, and inclusion into all practices, policies, and behaviors. In addition, UA has a DEI team of two FTEs whose work empowers each area of the organization to move toward our goals and coordinate the dedicated group of staff and leaders who set and drive DEI priorities in each pillar of the organization. Along with UA's Equity Council and consistent with our philosophy of shared equity leadership, these groups form a network that ensures progress, acknowledging that this work is permanent and evolutionary and will never be fully completed.

UA is finalizing a 2024-2029 University Advancement DEI Strategic Plan that has been formulated in alignment with the UW's Race and Equity Initiative and Diversity Blueprint and anti-racism organizational development models.

Diversity Blueprint Goals

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

- FY24 marked the third year of the UA equity survey. UA designed and implemented this survey with guidance from UWHR. It is deployed annually to collect quantitative and qualitative data on the UA climate related to DEI and serves as the bedrock upon which the organization shapes forthcoming strategies, plans, and actions.
- UA has developed programs and educational opportunities to support equity, inclusion, and belonging: Equity Lab (education/training), Dare to Lead: Courageous Leadership, Amplify Gender Equity and Leadership Initiative, employee resources groups (ERGs), Elevate (communications group), leadership training for committees, and regular trainings for departments customized to their needs.
- UA exceeds the University average for contracting with diverse vendors and plans to continue growth in this area.



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- UA DEI has created and will administer an equity-focused manager fundamentals training for all Advancement leaders.

DEI BLUEPRINT GOAL: 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 and the annual Strategic Priorities Alignment (SPA) processes.
- UA's 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.
- Aligned with SB 5227, UA will set a goal of 100% participation in the training programs developed by OMA&D and plans to provide supplemental training.
- UA's mentorship program launched in May 2023.
- UA DEI is partnering with UA Talent Acquisition to build an interview rubric tailored for each area of the organization to help mitigate bias and ensure fairness in the search process.

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

Like many at the UW, our UA teams have a standard practice of using the University of Washington Land Acknowledgment at the start of programs and large public engagements. 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. We also integrate place-based education and engagement into our daily work, as evidenced by our consultations and engagement with tribes in the naming and visual identity of Portage Bay Crossing and fundraising and engagement in many contexts, including the Shell House and wəṭəbʔaltx^w – Intellectual House phase 2.

DEI BLUEPRINT GOAL: IMPROVE ACCOUNTABILITY AND TRANSPARENCY AT ALL LEVELS

- Advancement's DEI Vision and Values are being incorporated into UA's Vision and Values. This will reiterate that DEI is included in everything we do.
- Our DEI values, strategic plan, and dashboard are displayed prominently on the UA website and are shared directly with UA colleagues.
- Launched in spring FY23, UA's equity report was distributed to all Advancement employees and is accessible on the UA intranet. The report will be updated and released to staff and stakeholders annually.
- Many DEI materials summarize and include findings from our annual DEI survey. The specific results are shared with discretion to protect the anonymity of the participants.



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Required Budget Development Consultative Process Summary – Faculty, Staff and Students

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-- If specific questions are not applicable to your unit, simply indicate n/a --

Consultation with your elected faculty councils, student councils and unit/campus staff, regarding your unit's/campus's budget proposal materials, including your proposed FY25 operating budget, narrative responses, tuition rate recommendations and fee-based rate recommendations are an important and necessary component of the UW's budget development process. Your responses to the questions below will be documented and included as part of the FY25 operating budget development review materials provided to Executive Leadership of the UW.

PLAN NOW to ensure that all unit/campus review and consultative processes are completed by the March 4, 2024 due date.

- 1) Please indicate the date that FACULTY leadership within your unit/campus was consulted and provided the opportunity to provide input as part of this budget planning exercise
N/A
- 2) Please list a point of contact for your FACULTY leadership (name and UW email address).
N/A
- 3) Please indicate the date that STUDENT leadership within your unit/campus was consulted and provided the opportunity to provide input as part of this budget planning exercise.
N/A
- 4) Please list a point of contact for your STUDENT leadership (name and UW email address).
N/A
- 5) Please discuss how you involved campus or unit staff in the consultative process.

The strategic framework by which UA has created its FY25 operating budget and narrative responses involves all areas of the organization, across the institution. In this inclusive and transparent process, the Executive Strategic Team of Advancement drafts the fiscal-year priorities with input from UA's expanded leadership team consisting of unit and central leadership (XLT) and longer-term objectives of the organization in the winter of each year. These priorities are influenced by ongoing conversations with leadership and Advancement staff across the institution, our annual SPA process in which every unit participates, and serve to support the priorities of the UW.

- 6) Since submission of your tuition and/or fee-based rate recommendations on February 1, 2024, has your campus or unit received any additional feedback from students? If so, please summarize here.
N/A