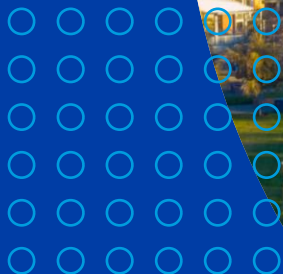


WELCOME

APRIL 20, 2023

UNIVERSITY ADVANCEMENT
FY23 RETREAT



WELCOME!



David Briseno



David Danelski



Annalicia Garcia



Sandy Liarakos



Anya Lott



Tracy Telliard



Lisa Tyson



Chelsea Usher



Kris Vargas

CONGRATULATIONS!



Maite Zabala-Alday





ICEBREAKER HOSTED BY EMPLOYEE ENGAGEMENT GROUP



**HAPPY WORK
ANNIVERSARY!**



RECOGNITION

ADVANCEMENT PEER-TO-PEER AWARDS

- ▶ For specific action “above and beyond”
- ▶ Direct Recognition from one employee to another without approvals
- ▶ Peer-to-Peer Recognition Page on UA4U
 - ▶ Digital recognition and Dining Dollars gift card to recipient
- ▶ Quarterly drawing
- ▶ Tied to our values
 - ▶ Excellence, Integrity, Accountability, Respect, Collaboration

APRIL 20, 2023

University Advancement Strategic Direction

Presented by

Monique M. Dozier

Vice Chancellor, University Advancement



RIVERSIDE

BOLD HEARTS. BRILLIANT MINDS.



AGENDA

01

UCR 2030 CAMPUS STRATEGIC INITIATIVES

Overview and key highlights from central campus level strategic initiatives.

02

UA'S ROLE IN UCR 2030 PLAN

Connecting UA's efforts to the central campus plan to illustrate our collective impact and focus.

03

UA MACRO OBJECTIVES & KPIs

Big picture objectives for UA, integrated across departments, with metrics to track year-over-year.

04

VISION SESSION REPORTS

Overview and initial analysis of vision session and strategic planning process taking place with campus units.



UCR 2030 CAMPUS STRATEGIC PLAN

UCR 2030 STRATEGIC INITIATIVES

PILLARS OF OUR MISSION



01

Research & Scholarship

Distinctive, transformative research and scholarship



02

Learning Environment

A rigorous, engaging, and empowering learning environment



03

Vibrant Community

A welcoming, inclusive, and collaborative community



04

Public Good

Advancement of the public good



05

Climate Action

Sustainability for climate action and environmental justice

UCR 2030 STRATEGIC INITIATIVES

STRATEGIC GOALS



STRATEGIC GOAL 1

BUILD FINANCIAL STABILITY, RESILIENCY, AND SUSTAINABILITY

OBJECTIVES	INITIATIVES	METRICS
<p>Increase net revenue</p>	<p>Grow nonresident enrollment</p>	<p>Enrollment Numbers; Net revenue</p>
	<p>Increase summer sessions offerings & enrollment</p>	<p>Number of new summer courses/enrollments; Net revenue</p>
	<p>Increase number of master’s programs & master’s enrollment</p>	<p>Number of new programs/enrollments; Net revenue</p>
	<p>Grow extramural research funding</p>	<p>Total extramural research \$; Total F&A revenue; Extramural funding/faculty member; Number of funded faculty</p>
	<p>Grow philanthropy</p>	<p>Dollars raised annually; Size of gifts</p>
	<p>Advocate for resources from state of CA</p>	<p>Percentage increase in year-over-year state allocation; Increase in total state funding</p>
<p>Improved financial models</p>	<p>Stabilize funding for core research facilities</p>	<p>Adoption of new templates & tools</p>
	<p>Provide budgeting and forecasting tools to units</p>	

STRATEGIC GOAL 2

INVEST IN THE SUCCESS OF PEOPLE WHO TEACH, RESEARCH, WORK, LEARN, AND LIVE AT UCR

OBJECTIVES	INITIATIVES	METRICS
<p>Address Faculty Equity and Professional Growth</p>	<p>Reduce equity gaps</p> <p>Enhance leadership development</p>	<p>All faculty within 3% of their projected median</p> <p>Number of participants and program evaluations</p>
<p>Improve Graduate Student Success and Pipelines</p>	<p>Improve graduation rates; Decrease equity gaps</p> <p>Grow new 4-1 & 3-2 master's programs</p>	<p># PhD 5-yr funding packages; # of training grant applications/awards; # fellowship applications/awards; Revised TA budgets; Program-level graduation rates & student outcomes</p> <p>Number of new programs and enrollments</p>
<p>Improve Undergraduate Student Success and Experience</p>	<p>Improve graduation rates; Decrease equity gaps; Sustain academic standards</p> <p>Expand high-impact practices and career / leadership development across demographics</p>	<p>By 2030 75% (4yr) and 85% (6yr); Elimination of equity gaps in persistence, graduation, time to degree, satisfaction measures; program-level student outcomes; Proficiencies in WASC core competencies</p> <p># of students participating (disaggregated); Satisfaction measures</p>

STRATEGIC GOAL 2 (continued)

INVEST IN THE SUCCESS OF PEOPLE WHO TEACH, RESEARCH, WORK, LEARN, AND LIVE AT UCR

OBJECTIVES	INITIATIVES	METRICS
Address Staffing Levels, Staff Flexibility and Professional Growth	Invest in strategic hiring	Productivity, engagement, and client satisfaction in targeted units
	Enhance professional development	Staff management survey; retention rates
Enhance Campus Space	Expand and improve teaching facilities	ULTF project completed by 2026; All existing campus class labs/studio spaces updated by 2030
	Support ongoing renovation of research facilities	700,000 square feet of space renovated
	Develop additional student housing	Increase in # of beds; Increase in percentages of undergraduate, graduate, and international students living on campus

STRATEGIC GOAL 3

EXPAND THE VISIBILITY AND SCOPE OF INFLUENCE OF UCR LOCALLY, NATIONALLY, AND GLOBALLY

OBJECTIVES	INITIATIVES	METRICS
<p>Strengthen AAU Membership Candidacy</p>	<p>Grow doctoral program enrollments; Grow federal and non-federal research funding; Expand postdoctoral appointments; Promote faculty and UCR nationally through media, awards, and national networks</p>	<p>Percentage of graduate students; Doctoral education outcomes (completion rates and job placements); Doctoral degrees awarded/faculty member; Postdoctoral appointments/faculty member; Funding/faculty member</p>
<p>Serve as an Anchor Institution for Research and Economic Development in IE</p>	<p>Invest in centers of research and development on campus</p>	<p>At least two centers activated and funded; Building in place and fully occupied by 2030</p>
<p>Achieve Additional National Recognition</p>	<p>Carnegie classification – Community Engagement</p> <p>APLU classification – Innovation & Economic Prosperity</p> <p>APLU Award – Global Learning, Research, & Engagement</p> <p>AASHE Sustainability Tracking Assessment & Rating System</p>	<p>Achieved by 2030</p>



UCR 2030



CENTRAL CAMPUS LEVEL STRATEGIC INITIATIVES

PILLARS OF OUR MISSION:

- [1] Distinctive, transformative research and scholarship
- [2] A rigorous, engaging, and empowering learning environment
- [3] A welcoming, inclusive, and collaborative community
- [4] Advancement of the public good
- [5] Sustainability for climate action and environmental justice

The central campus administration must provide the foundation for the faculty and staff in the schools, colleges, and other units to achieve the goals laid out in their respective strategic plans. The matrix below identifies three strategic goals for building that foundation. Within each central campus strategic goal, there are 2-5 broad objectives, key initiatives to support those objectives, initial specific action items to further the objectives,

and metrics by which we can gauge our progress and develop additional action items. The senior administrators listed as the lead coordinators are responsible for working with the deans and other unit leaders to provide resources and services in support of the objectives that each school/college/unit sets for itself and to facilitate coordination and collaboration for multidisciplinary and cross-campus initiatives.

The numbers in brackets after each initiative indicate the relevant pillar(s).

*Sustainability is currently an ad hoc Senate committee. There is a campus administrative Committee on Sustainability.

**UCR Staff Assembly is an association of many employees dedicated to promoting the interests and welfare of all UCR staff.

DIGITAL DOWNLOAD





UA'S ROLE IN UCR 2030 PLAN

STRATEGIC GOAL 1: UA'S ROLE

BUILD FINANCIAL STABILITY, RESILIENCY, AND SUSTAINABILITY

OBJECTIVES	INITIATIVES	UNIVERSITY ADVANCEMENT FY24 METRICS
<p>Increase net revenue</p>	<p>Grow nonresident enrollment</p>	<ol style="list-style-type: none"> 1. Increase applicant pool by 20% 2. Through Alumni Chapters/Affinity Groups, recruit and assign a minimum of two Alumni Admissions Ambassadors / target market.
	<p>Increase summer sessions offerings & enrollment</p>	<ol style="list-style-type: none"> 1. Through targeted marketing efforts, increase web traffic interest by applicant pool by 20%
	<p>Grow extramural research funding</p>	<ol style="list-style-type: none"> 1. Identify and qualify <u>new</u> corporations, foundations, and individuals whose philanthropic interest match our Faculty Research 2. Identify and qualify four (4) Corporate Partnerships of Purpose

STRATEGIC GOAL 1: UA'S ROLE (continued)

BUILD FINANCIAL STABILITY, RESILIENCY, AND SUSTAINABILITY

OBJECTIVES	INITIATIVES	UNIVERSITY ADVANCEMENT FY24 METRICS
<p>Increase net revenue</p>	<p>Grow Philanthropy</p>	<ol style="list-style-type: none"> 1. All DO's should carry a portfolio of 100-200 prospects 2. All DO's should qualify or disqualify 3 suspects / month; make 1-2 solicitations / month 3. Increase Alumni Giving Participation from 2% to 4% 4. Create an Affinity model to inform factors to be included in Alumni Engagement scorecard by December 2023 5. Identify and qualify, at minimum, 4 CFR partnerships 6. Maintain Philanthropic goal at \$42M 7. Increase # gift commitments by 10% 8. Sustain and increase average Annual Giving gift size (Retention goal= 75%; Upgrade Donors = 20%) 9. Increase annual donor base by 10% 10. Year 1 (of 3) of Comprehensive Campaign Planning to be completed by June 2024: Overall/Unit Goals; Staffing Needs; Budget; Major Gift Prospect Pipeline Readiness

STRATEGIC GOAL 2: UA'S ROLE

INVEST IN THE SUCCESS OF PEOPLE WHO TEACH, RESEARCH, WORK, LEARN, AND LIVE AT UCR

OBJECTIVES	INITIATIVES	UNIVERSITY ADVANCEMENT FY24 METRICS
<p>Address Staffing Levels, Staff Flexibility and Professional Growth</p>	<p>Invest in Strategic Hiring</p>	<ol style="list-style-type: none">1. Based on campaign goal, complete pre-campaign planning staffing and budget analysis recommendation by March 20242. Present to leadership by June 2024

STRATEGIC GOAL 3: UA'S ROLE

EXPAND THE VISIBILITY AND SCOPE OF INFLUENCE OF UCR LOCALLY, NATIONALLY, AND GLOBALLY

OBJECTIVES	INITIATIVES	UNIVERSITY ADVANCEMENT FY24 METRICS
<p>Strengthen AAU Membership Candidacy</p>	<p>Promote faculty & UCR nationally through media, awards, & national networks</p>	<ol style="list-style-type: none">1. Work with RED and Deans to enhance the research profile through public awareness



VISION SESSION REPORTS

VISION SESSION ROADMAP

ACADEMIC UNITS

Complete Vision Session for each academic unit within the constituency programs by May 19.

DEANS' COUNCIL

Monique Dozier presents initial findings at Deans' Council Meeting on June 1.

CENTRAL UNITS

Vision sessions for central units will be scheduled starting summer 2023 and continue into the fall.

REFINE & PRIOTIZE

In FY24 UA will work with academic and campus leaders to prioritize and refine the revenue goals and strategic vision.

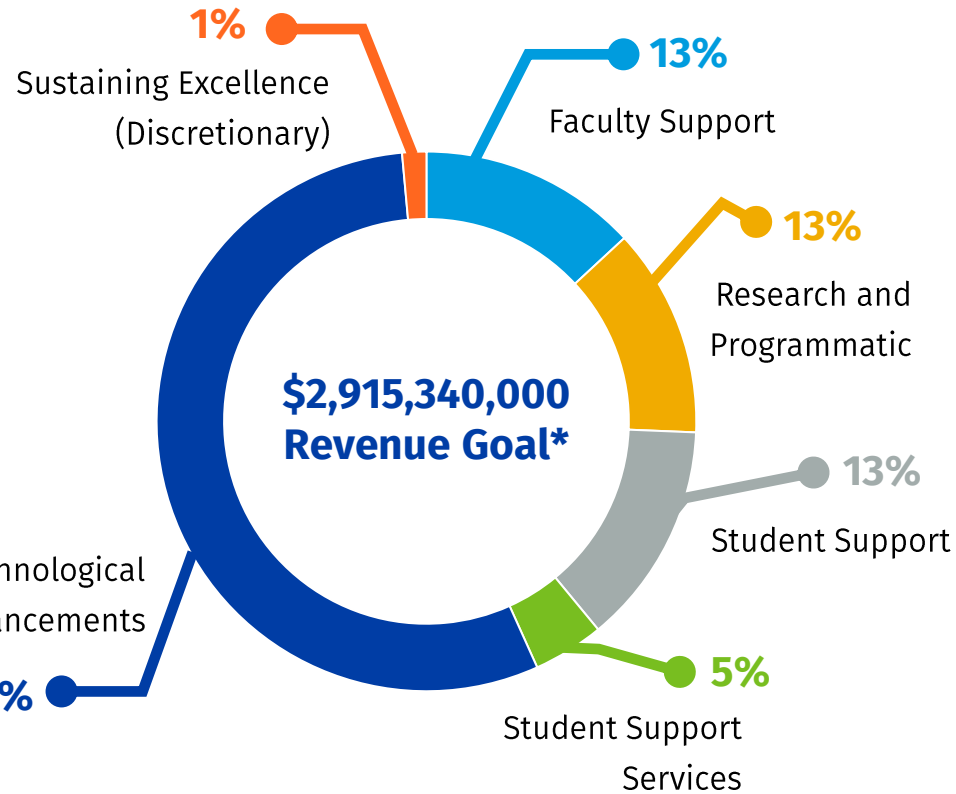
60%

6 out of 10 units completed – SOE, SPP, Extension, Libraries in progress.

UCR — SUMMARY

VISION SESSION REPORT+

3-year avg.
\$39,073,652



LIVING ALUMNI
158,558

LIFETIME DONORS
306,456

\$100K+ SUSPECTS/ PROSPECTS
5,417

Summed by academic unit, duplicates multi-degreed alumni and supporters of more than one unit.

Min Proposal Value

\$1,126,000,000

Max Proposal Value

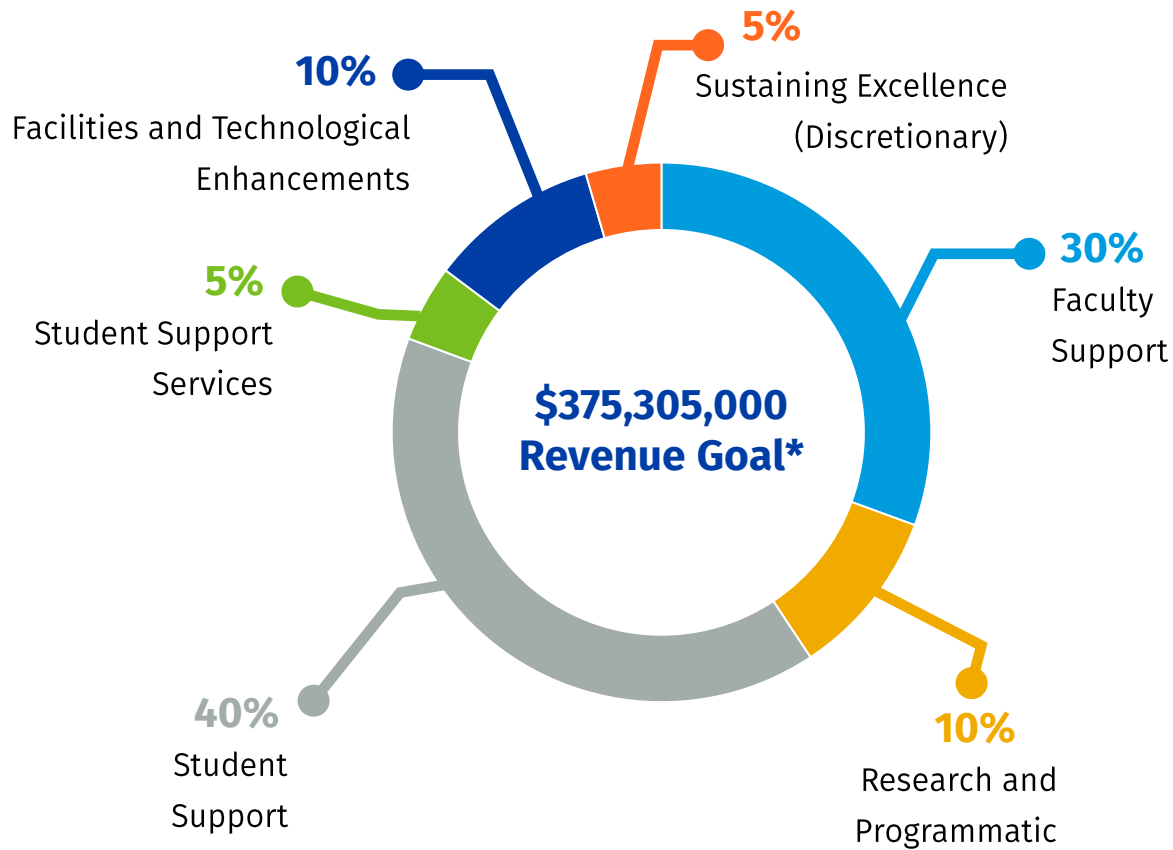
\$5,157,994,590

*Seven-Year Annual Target: \$416,477,143, if solely achieved with philanthropy

+Based on six completed vision sessions

SCHOOL OF BUSINESS

VISION SESSION REPORT



*Seven-Year Annual Target: \$53,615,000, if solely achieved with philanthropy

LIVING ALUMNI
11,105

LIFETIME DONORS
2,425

\$100K+ SUSPECTS/ PROSPECTS
542

Min Proposal Value

\$120,100,000

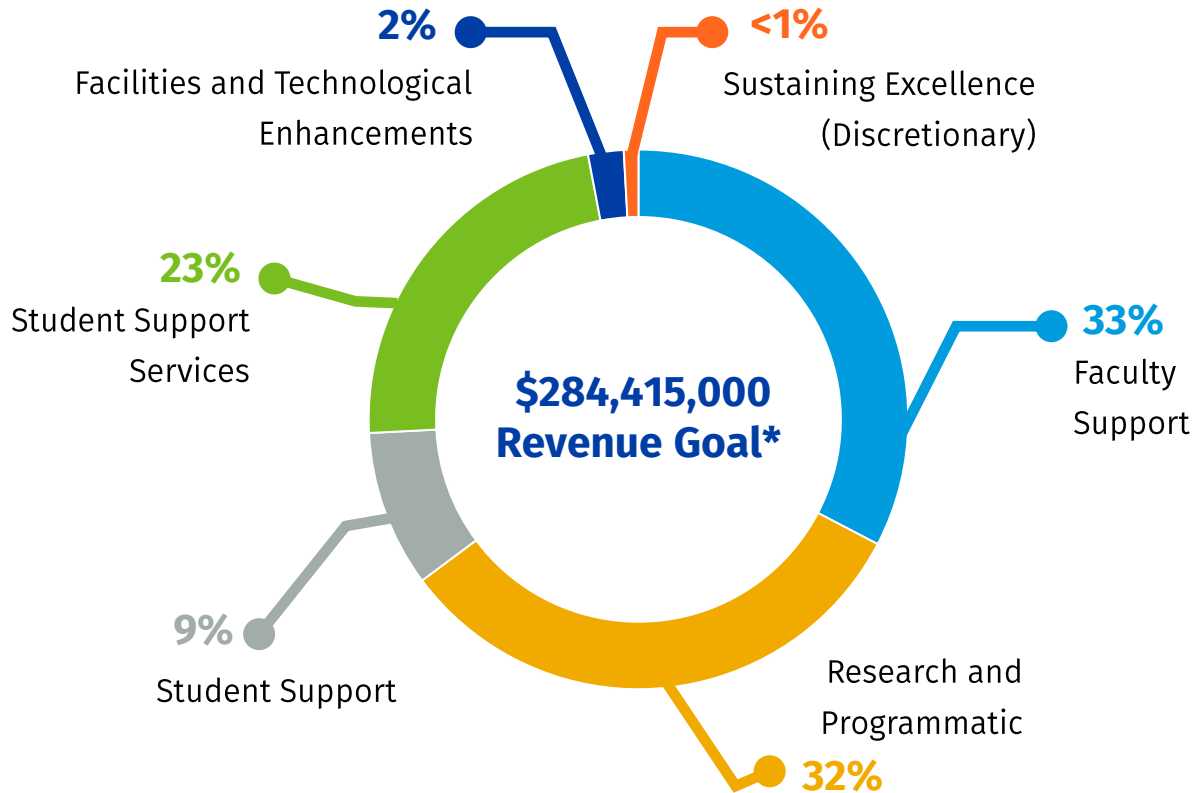
Max Proposal Value

\$570,499,460.00

INTERCOLLEGIATE ATHLETICS

VISION SESSION REPORT

3-year avg.
\$541,853



\$284,415,000
Revenue Goal*

*Seven-Year Annual Target: \$40,630,714, if solely achieved with philanthropy



Min Proposal Value

\$104,000,000

Max Proposal Value

\$471,999,652

COLLEGE OF NATURAL AND AGRICULTURAL SCIENCES

VISION SESSION REPORT



LIVING ALUMNI
 34,029

LIFETIME DONORS
 17,729

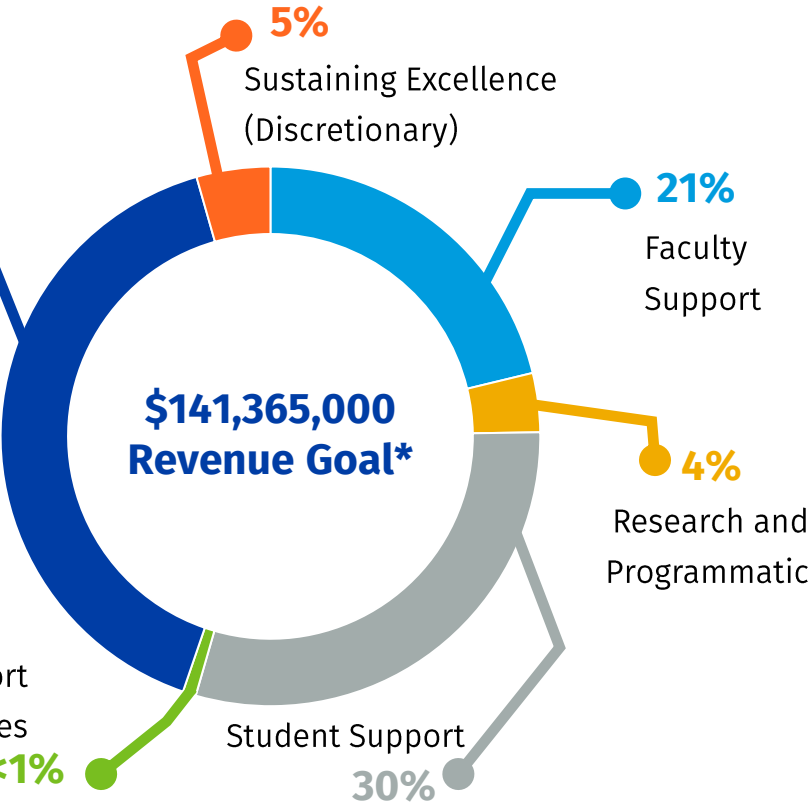
\$100K+ SUSPECTS/ PROSPECTS
 1,412

Min Proposal Value

\$242,600,000

Max Proposal Value

\$1,154,498,590



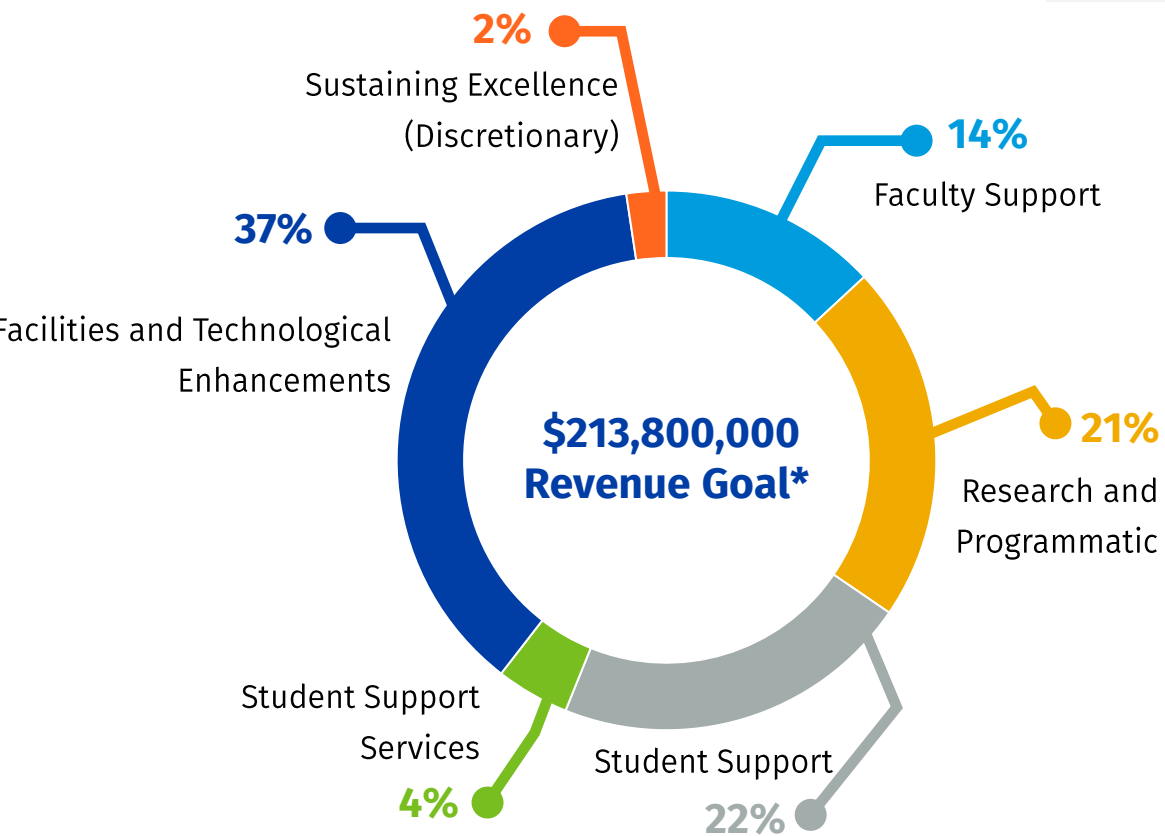
\$141,365,000 Revenue Goal*

*Seven-Year Annual Target: \$20,195,000, if solely achieved with philanthropy

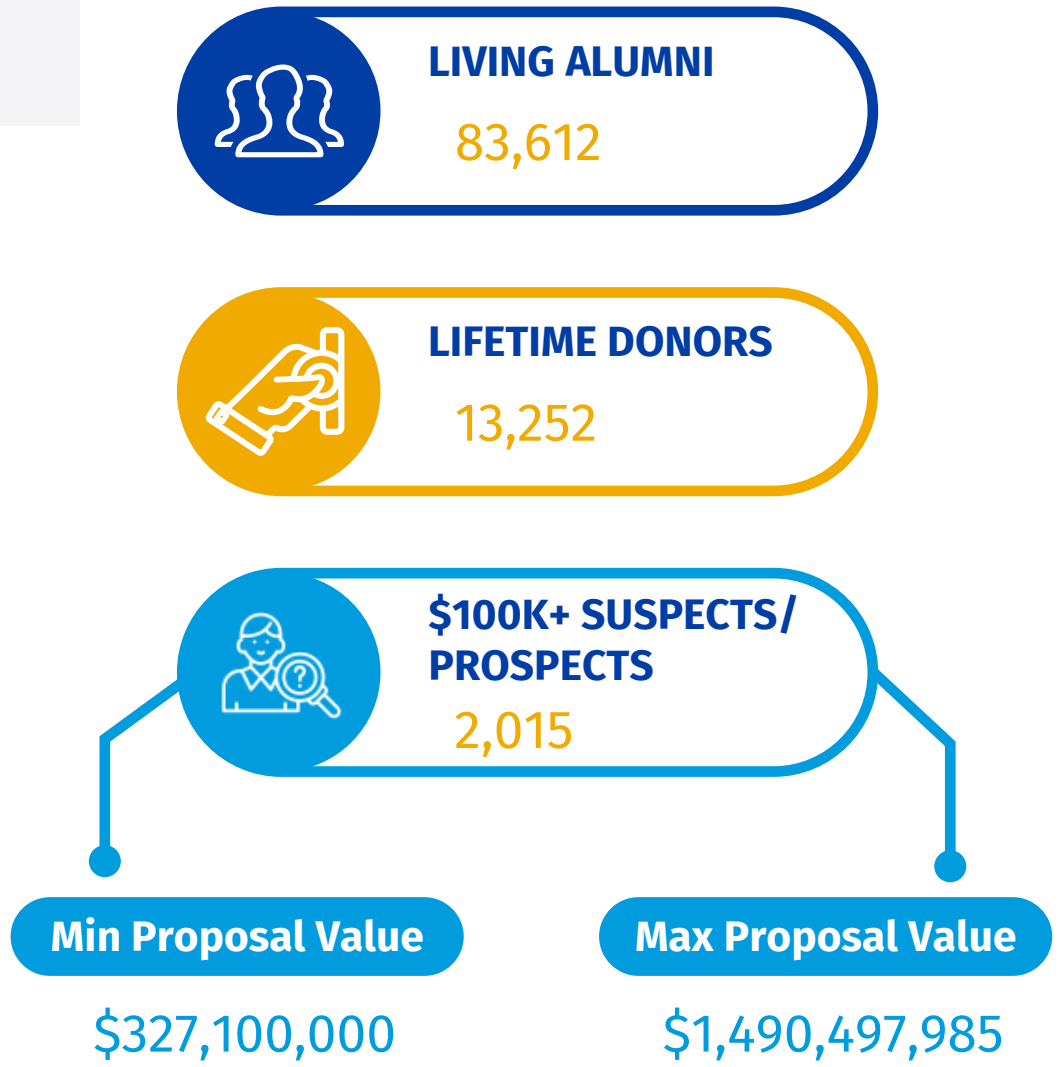
COLLEGE OF HUMANITIES, ARTS, AND SOCIAL SCIENCES

VISION SESSION REPORT

3-year avg.
\$8,736,980



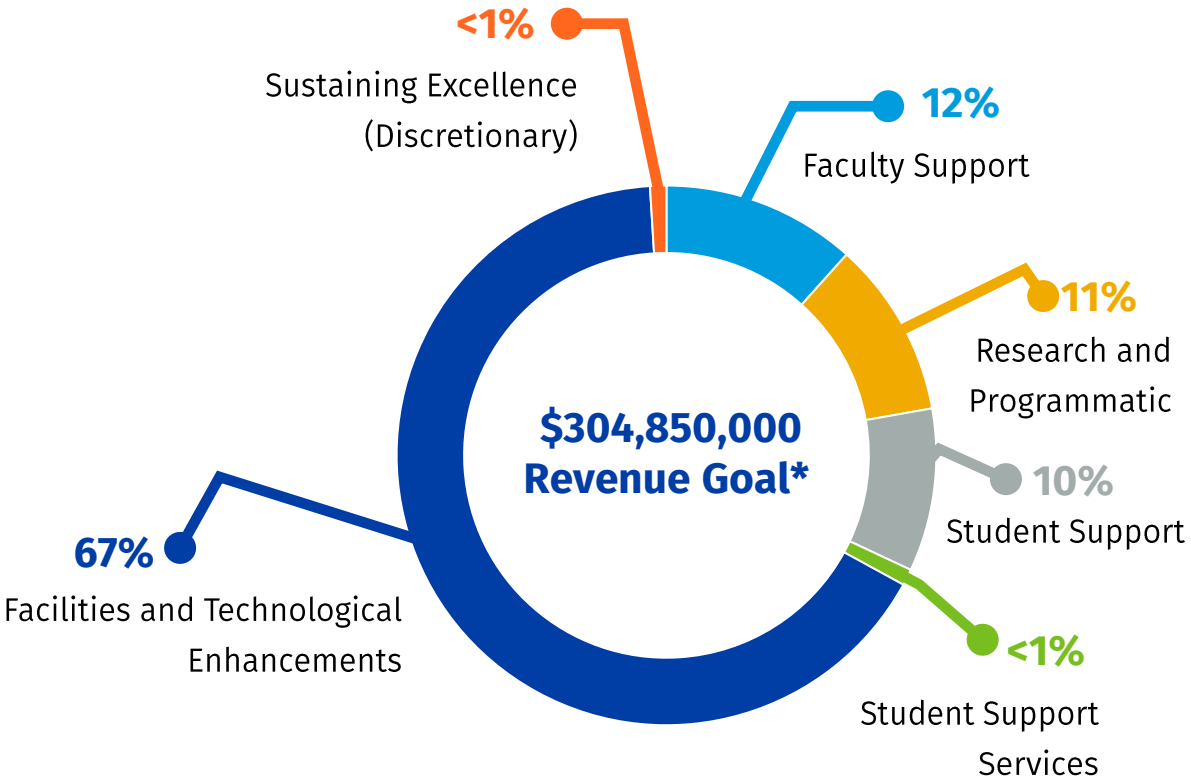
\$213,800,000
Revenue Goal*



*Seven-Year Annual Target: \$30,542,857, if solely achieved with philanthropy

MARLAN AND ROSEMARY BOURNS COLLEGE OF ENGINEERING

VISION SESSION REPORT



LIVING ALUMNI
 11,655

LIFETIME DONORS
 4,432

\$100K+ SUSPECTS/ PROSPECTS
 426

Min Proposal Value

\$102,900,000

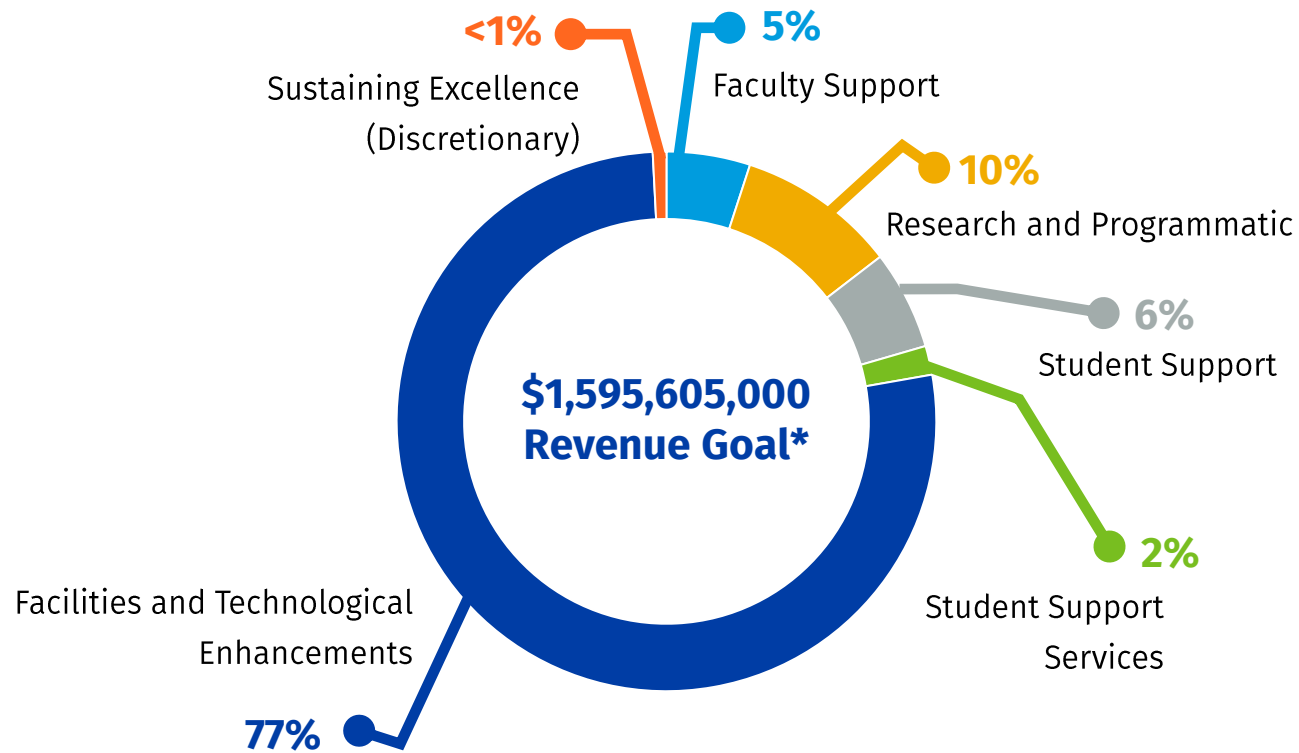
Max Proposal Value

\$465,499,575

*Seven-Year Annual Target: \$43,550,000, if solely achieved with philanthropy

SCHOOL OF MEDICINE

VISION SESSION REPORT



LIVING ALUMNI
1,212

LIFETIME DONORS
2,664

\$100K+ SUSPECTS/ PROSPECTS
334

Min Proposal Value

\$108,400,000

Max Proposal Value

\$491,999,667

*Seven-Year Annual Target: \$227,943,571, if solely achieved with philanthropy



UA MACRO OBJECTIVES & KPIs

University Advancement

Objectives organized by core outcomes across UA enterprise.

01 Organizational Capacity
Deploy talent, resources, and infrastructure strategically to ensure sustainable growth of University Advancement's impact.

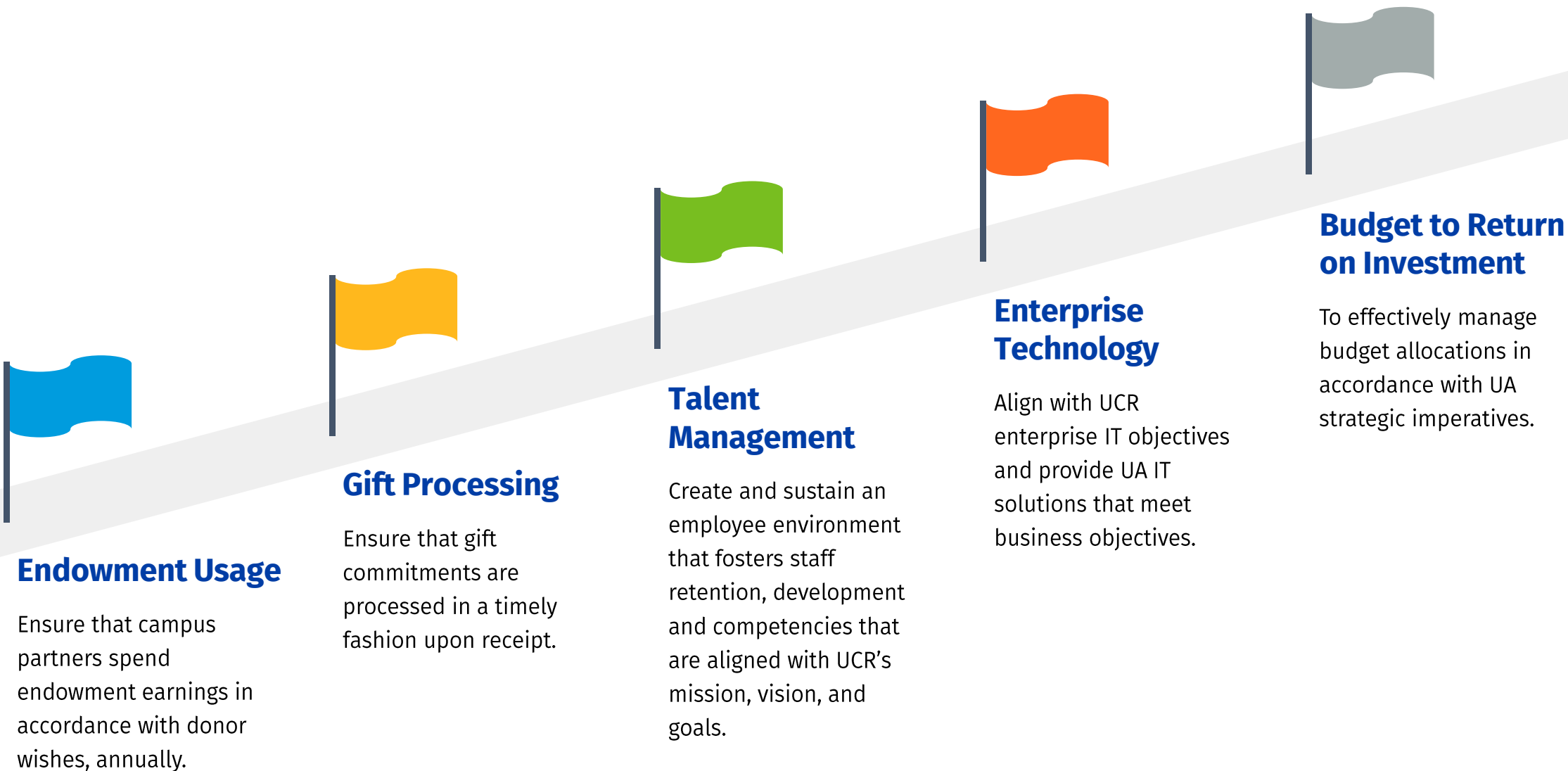
02 Awareness
Tell the story of America's fastest rising university to enhance and protect the reputation of UCR within California, the country, and the world.

03 Engagement
Cultivate the relationships between UCR, its alumni, students, and key stakeholders to promote deeper connections.

04 Investment
Build meaningful partnerships with individuals, corporations, and foundations to raise private philanthropic support for UCR.

ORGANIZATIONAL CAPACITY

MACRO OBJECTIVES



AWARENESS

MACRO OBJECTIVES

Owned Media (Web)

To increase UCR web traffic and visibility profile.

Paid Media

To increase advertising campaigns in target markets for brand building, enrollment, alumni engagement, and philanthropy.

Earned Media

To increase UCR visibility in local, regional, and national markets.

Owned Media (Storytelling and Channels)

To demonstrate to internal/external stakeholders the impact UCR is making in the state, domestically, and globally.

To demonstrate to internal/external stakeholders the impact they are making on behalf UCR in the state, domestically and globally.

Social Media (Sentiments)

To collect and find meaning in data gathered from social channels to support business decisions – and measure the performance of actions based on those decisions through social media.



ENGAGEMENT

MACRO OBJECTIVES

Signature Events

To provide signature experiences across the county to increase affinity, awareness, and support for UCR.

Program Offerings

To offer alumni, parents, and students meaningful and consistent programming to inspire life-long engagement.

Volunteer Service

To offer alumni and donors multiple ways to demonstrate their talent, share their experiences, serve UCR, and their respective communities. (boards, guest lectures, speakers, career service, community service, etc.)



Digital Engagement

To provide multi-channel digital engagement opportunities for students, alumni, and other stakeholders to drive brand awareness, improve relations and gained efficiencies.

Alumni Chapters

To provide UCR alumni and current students lifetime opportunities to network and engage in their local communities.

Corporate Partnerships of Purpose

To build sustainable and mutually beneficial relations with national corporate partners whereby not only do they invest in UCR philanthropically, but they engage with our academic community and assist with the development of our students throughout their matriculation and beyond.

INVESTMENT

MACRO OBJECTIVES



Giving Participation

To increase the number of alumni giving of their time, talent, and treasure. To increase the number of faculty/staff, parents, and other stakeholder giving.

Giving Societies

To recognize philanthropic investors who regularly and increasing support UCR through their generosity.

Board Giving

To ensure UCRF Board of Trustees and UCRAA Board of Directors support the university philanthropically.

Annual Fundraising Goal

To meet or exceed annual fundraising expectations.

UA MACRO OBJECTIVES

MEASURABLE KPIs

OBJECTIVE	METRIC	METRIC	METRIC	METRIC
Endowment Usage	80% spending annually			
Gift Processing	72 hours turnaround			
Talent Management	Talent mobility	Talent development	Talent turnover	Talent engagement
Enterprise Technology	Utilization	Time Req. to deliver business objectives	Core Competencies	
Budget to ROI	Maintain 50% overall ROI	Maintain cost to raise a dollar of \$0.30		
Owned Media (Web)	Awareness (web traffic to priority sites)	Consideration (visits to conversion forms)	Conversion/CTA (online alumni & giving transactions)	
Paid Media	Efficiency (cost/click, cost/1k impressions)	Targeted Reach	Conversion/CTA	
Earned Media	Coverage in top 100 media outlets	Contacts with journalists in top 100 outlets		

UA MACRO OBJECTIVES

MEASURABLE KPIs

OBJECTIVE	METRIC	METRIC	METRIC	METRIC
Social Media (sentiments)	Total engagements	Engagement rate		
Owned Media (Storytelling/Channels)	Open rates/click rates/total clicks	Expanded creation & distribution of impact stories		
Signature Events	# of annual engagements	Registrations, attendance, melt rates	Attendee Satisfaction	
Program Offerings	# of annual programs	Registration, attendance, melt rates	Stakeholder satisfaction	
Volunteer Service	# of offerings	Hours of participation	\$\$ Conversion rate for hours	
Corporate Partnerships of Purpose	2 new partnerships annually			
Alumni Chapters	Alumni chapter in minimum of all target markets			
Digital Engagement	# new digital engagement opportunities	# participants	Participant satisfaction	

UA MACRO OBJECTIVES

MEASURABLE KPIs

OBJECTIVE	METRIC	METRIC	METRIC	METRIC
Giving Participation	Alumni Giving Participation rate	Alumni Engagement Participation rate	Fac/Staff, Parent, Student participation Rates	
Giving Societies	# members / society			
Board Giving	100% UCRF Board Giving	100% UCRAA Board Giving		
Annual Fundraising Goal	Progress towards \$42M fundraising goal	# new \$100k+ commitments	Total # unique donors	

NEXT STEPS – GOAL SETTING

OPERATIONAL PLANS

Metric Targets

Each UA objective metric will have an annual target. UALT will be working to set and distribute FY24 targets by May 1.

Operational Planning

Every UA team will take part in operational planning for FY24 – ensure team goals drive progress towards UA objective metric targets.

QUESTIONS?





15-MINUTE BREAK

DEPARTMENT STRATEGIC DIRECTION



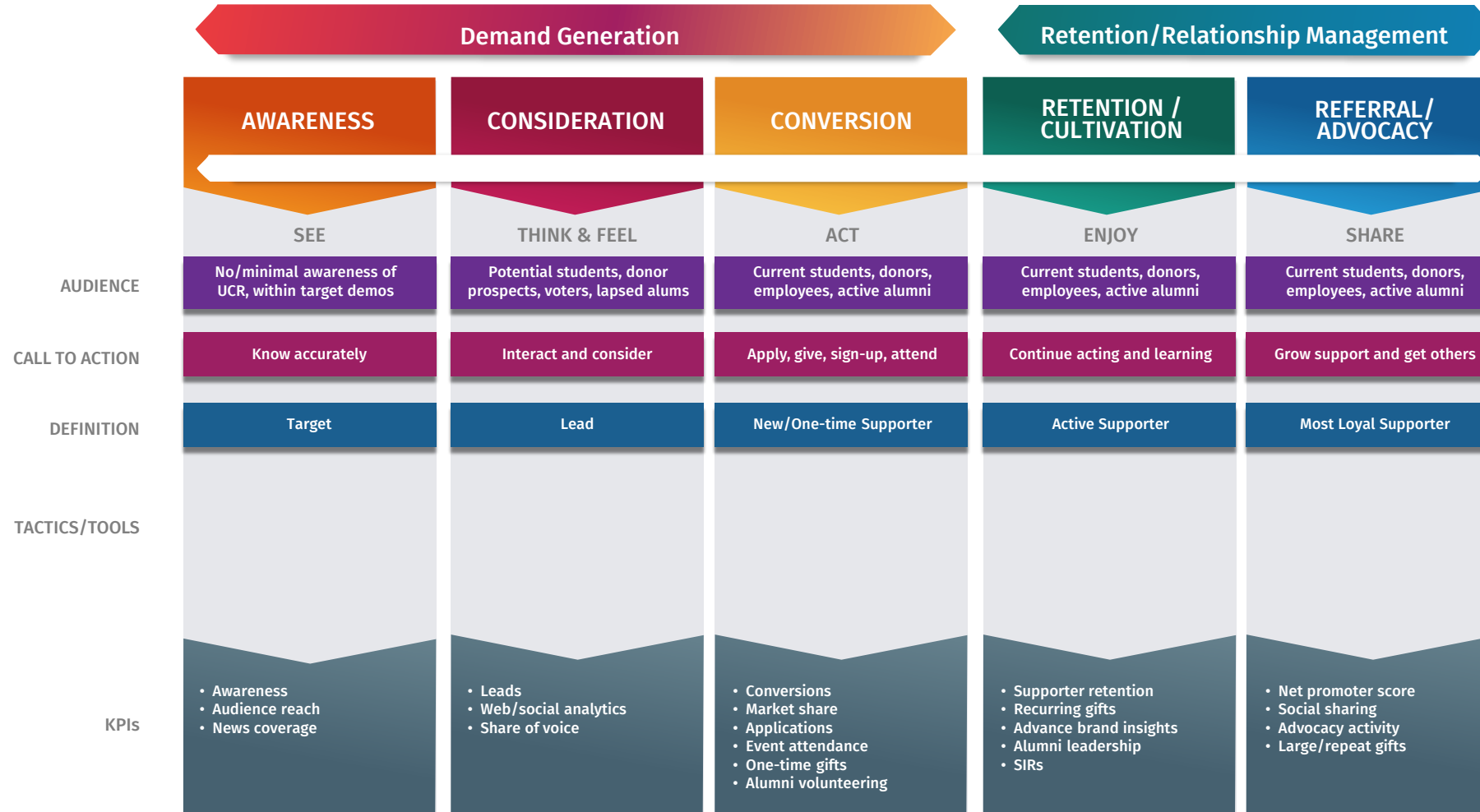
UNIVERSITY RELATIONS



FY24 STRATEGIC PRIORITIES

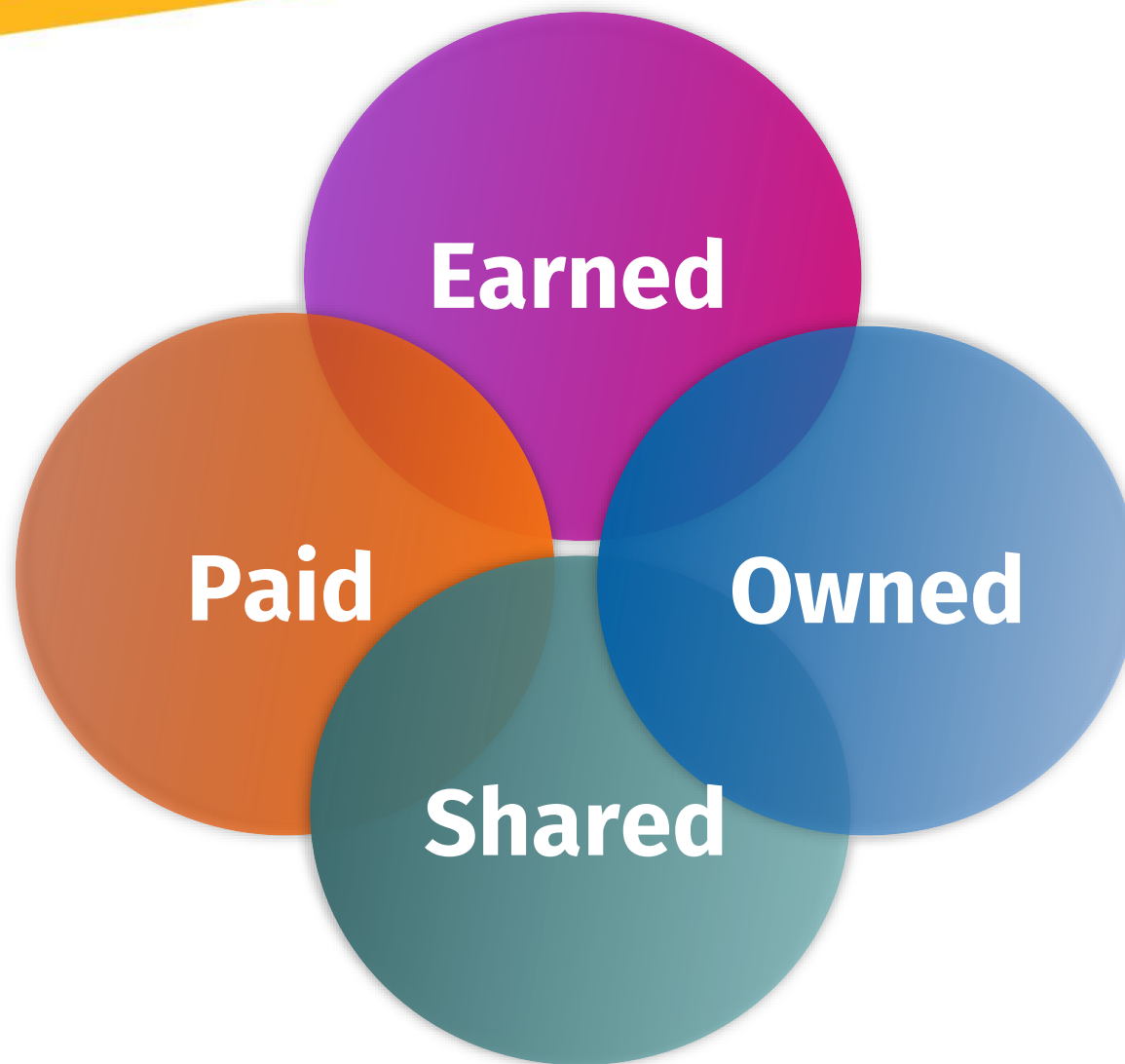
- Support Revenue Generation
- Strengthen the UCR Brand
- Expand Reach and Awareness
- Build Affinity and Enthusiasm
- Grow Capacity on Campus

UCR SUPPORTER JOURNEY





INTEGRATED MARKETING



DRAFT ANNUAL CALENDAR

August 2023

UCR Magazine

September 2023

Northern California Regional Event

New Highlander Welcome

UCR Marketing Conference

October 2023

Faculty Scholars Day

School of Medicine Gala

November 2023

Men's Basketball at UNC Chapel Hill

DOE to the People

Alumni Weekend

December 2023

Riverside Festival of Lights

January 2024

Southern California Regional Event

DRAFT ANNUAL CALENDAR

February 2024

UCR Magazine

March 2024

Hays Press-Enterprise Lecture

April 2024

Give Day
Annual Gala

May 2024

Donors and Scholars
UCR Magazine

June 2024

Senior Send-off
Commencement

ALUMNI ENGAGEMENT

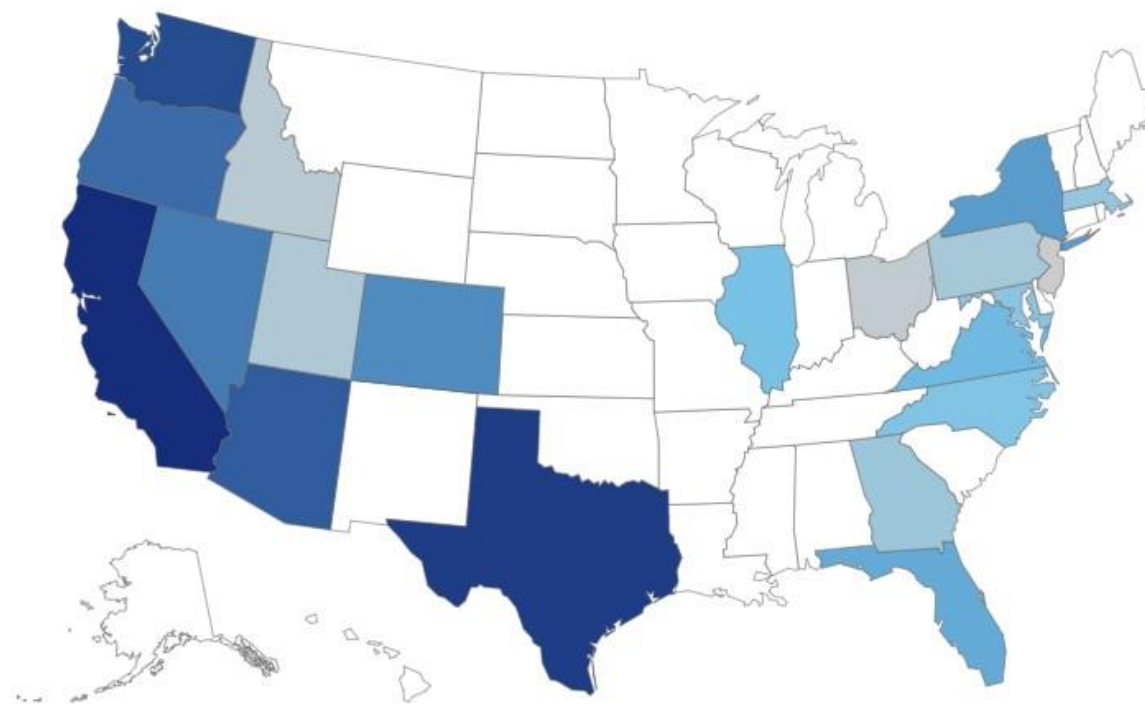


Regional Presence Outside of California

- **Alumni presence**
- **Donors, friends, and prospects**
- **Large population centers**
- **Admissions activity**
 - **UC qualified students**
- **Potential for corporate / executive contacts?**

Constituent Saturation: Top 20 States

State	# Constituents (Individuals)	# Alumni	# Friends	# Donors	# Prospects
California	340,415	119,737	230,397	48,199	9,146
Texas	4,136	2,346	1,992	989	87
Washington	3,509	2,294	1,406	951	137
Arizona	3,241	1,741	1,679	879	78
Oregon	2,292	1,473	931	677	79
Nevada	2,207	1,134	1,172	518	63
Colorado	1,862	1,197	773	529	63
New York	1,802	962	907	499	68
Florida	1,790	955	936	465	41
Virginia	1,271	825	500	348	47
Illinois	1,086	583	552	277	33
North Carolina	1,016	570	516	265	18
Maryland	996	625	406	324	30
Massachusetts	995	486	544	317	52
Georgia	973	537	485	241	9
Pennsylvania	866	482	423	248	16
Utah	833	471	419	206	24
Idaho	792	464	396	190	12
Ohio	789	433	389	217	1
New Jersey	748	418	368	181	19
Total	371,619	137,733	245,191	56,520	10,023



Friends: all non-alumni individual constituents | **Donors:** gift or pledge at any time | **Prospect:** Lifetime giving of \$100K+, or gift capacity of \$100K+, or assigned to a RC

Primary Markets

- Metro Seattle
- Metro New York
- Metro D.C.

Secondary Markets

- Metro Dallas
- Southern Florida
- Metro Phoenix
- Metro Las Vegas





California Priority Markets Beyond IE

- **San Francisco Bay Area**
- **Orange County**
- **San Diego**
- **Los Angeles – Eastern San Gabriel Valley**

DEVELOPMENT

UC RIVERSIDE

BOLD HEARTS. BRILLIANT MINDS.



34 Days Strong at UCR

AVC of Development as of March 6, 2023

Onboarding

- Thank you for all the wonderful onboarding meetings with Central Teams and Units/Colleges/Schools Teams
- Development Team Meeting
- Lunch with the Chancellor
- Meetings with Deans and Associate Deans
- Meetings with Vice Chancellors and Academic Leaders
- Meetings with a few Board of Trustee members
- Attended the Donor/Scholar School of Education Luncheon and Executive Fellows Installation Dinner for School of Business

Observations

- Passionate, Dedicated, Strong Work Ethic to uplift the mission of UCR



Development

Philanthropic Annual Goal of \$42M

- \$42M needs to be Development's consistent and steady goal over the next few years to get to the next goal tier of \$60M and eventually \$80M annually.

Prospects

- Principal Gifts (inclusive of planned gifts)
- Major Giving (inclusive of planned gifts)
- Corporate and Foundation Relations (CFR)
 - Continue to build and expand CFR funders
 - Expand Corporate Partners of Purpose
- Annual Giving/Online Participation
 - Culture of Philanthropy/Give Day



In Preparation for FY24

- Operational Plans
- Goal Setting
- Portfolios (*expected by May 12th*)
- Metrics

**PD will join the Development Team Meeting on May 17th*

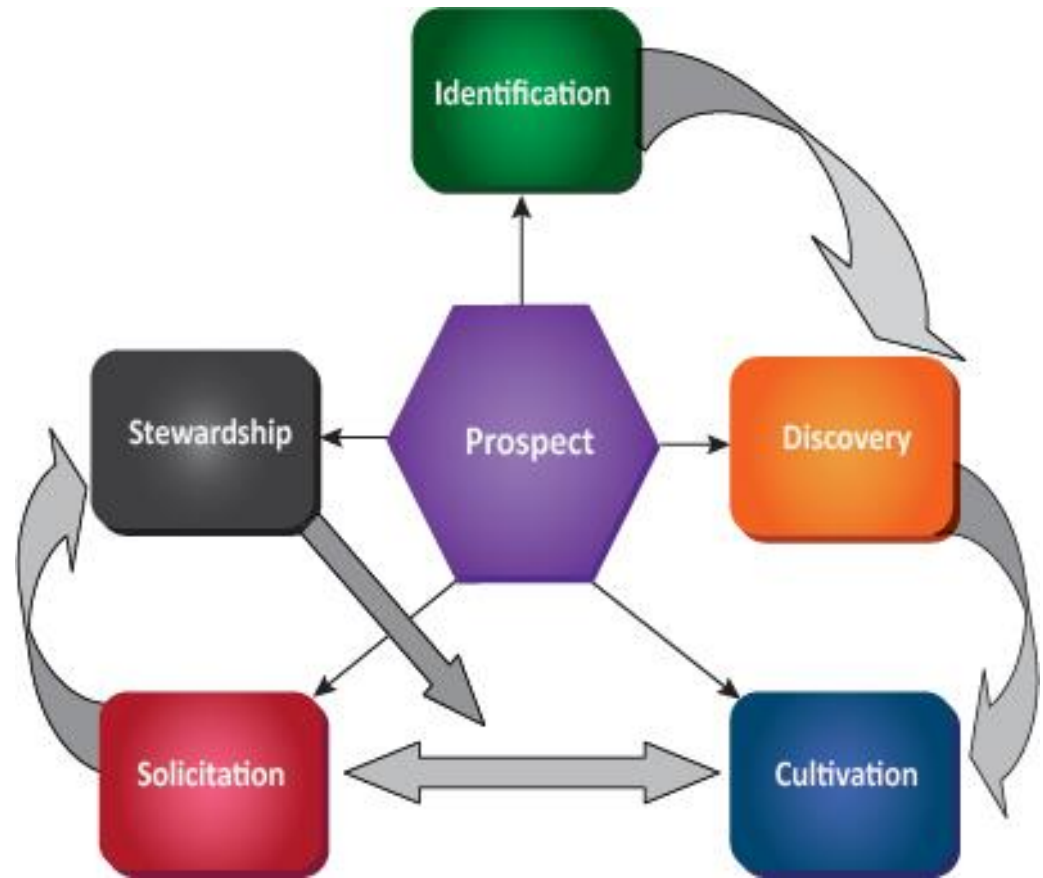
CHIEF OF STAFF

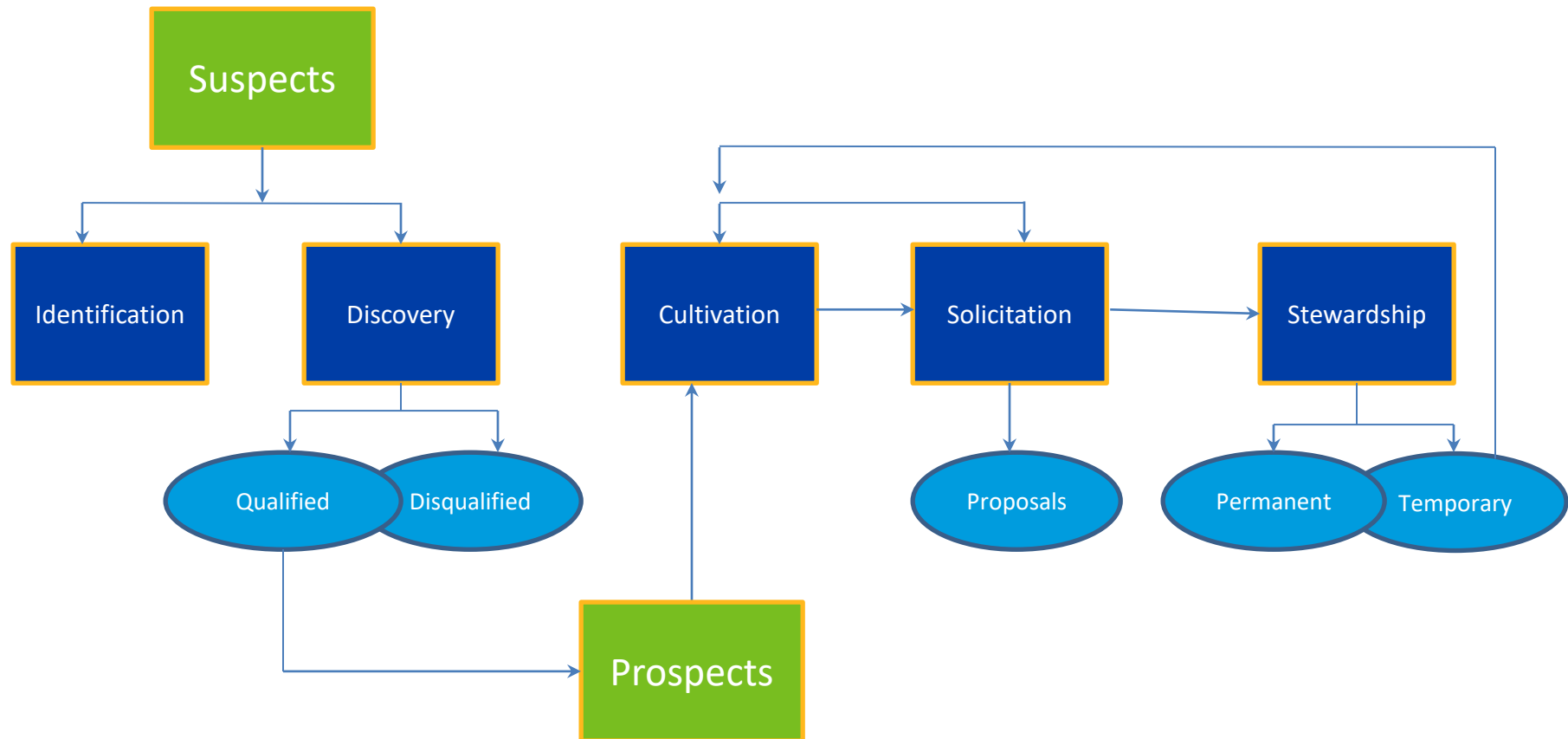


PROSPECT DEVELOPMENT



PROSPECT CONTINUUM







PORTFOLIOS

QUALIFICATION & MOVES
MANAGEMENT ARE KEY!

- Right sizing all gift officer portfolios – **May 12 Target**
- Gift Capacity – entire database; removed “top prospect” filter

Wealth Indicator	<\$1M	\$10M+	\$1M-\$9.9M
Income	5%	20%	15%
Private Business/Sales Revenue	10%	20%	15%
Real Estate	5%	5%	5%
Securities	10%	20%	20%

- Looking at Constituency Program Units:
 - \$50k+ in Cultivation, Solicitation, Stewardship, Permanent Stewardship: **1,156**
 - 50k+ in Identification/Qualification: **41,890** | Of those – **4,570** are \$100k+
- Implementing Account Management model – PD strategic partners, ensuring prospects move through continuum successfully



BOARD RELATIONS



BOARD PRIORITIES

- Board meetings tied to signature events
- FY24 Committee Changes
 - Adding Bylaws Committee
 - Dissolving Beyond Brilliant and Advocacy Committees
- Strategic focus on nominations
 - Board composition and size
 - Board capacity and network

ADMINISTRATIVE SERVICES



DATA GOVERNANCE

- University Advancement begin strategic focus on Data Governance
- Data Governance defined as the exercise of authority and control over the management of data assets
- Define, implement principles, and policies on data
- Foundation has been poured for this effort
- Ready to create more formalized approach and structure
- In partnership with ITS and campus efforts for Enterprise Data Strategy



REPORTING

- Data for reporting comes from specific systems
- Long-term goal to create robust reporting where data from multiple systems can easily be combined
- Opportunity to consume more data for sophisticated analytics
- Need more than a database to achieve long-term goal
- In partnership with ITS and campus efforts for Enterprise Data Strategy

QUESTIONS OR COMMENTS?





LUNCH

BUSINESS RECONVENES AT 1:30PM



**ICEBREAKER HOSTED BY UA
DIVERSITY, EQUITY, INCLUSION &
BELONGING COMMITTEE**

Diversity, Equity, Inclusion & Belonging Committee

The committee was created in the summer of 2020 and the goal the committee is to provide support to staff and recommendations to management related the different topics of diversity, equity, inclusion, and belonging.



DuBron Rabb – Co-chair

Melissa Córdoba Carranza – Co-chair

Jorge Ancona – Executive sponsor

Maite Zabala-Aalday – Past chair, committee member

Brock Cavett – Committee Member

Elliot Emmer – Committee Member

Ruben Fierro – Committee Member

Austin Quick – Committee Member

Lisa Rabenstein – Committee Member

Melbert Seban – Committee Member

Diversity, Equity, Inclusion & Belonging Committee

For more information, resources, or to become an Advancement Ally, visit the [DEIB webpage on UA4U](#).

TO JOIN THE COMMITTEE,
please connect with a committee member.



DEIB ICEBREAKER: STAND UP



DISCUSSION TOPIC #1: UA'S ROLE IN STRATEGIC PLAN & MACRO OBJECTIVES

MONIQUE DOZIER & JOHNNY CRUZ



DISCUSSION TOPIC #1

Identify one member at your table to be a scribe.

Identify one member at your table to report out after discussion.

- Where do you see your team's core work intersecting with the Strategic Plan?
- What new or expanded initiatives could help us realize our objectives?
- Are there particular ideas or tactics from other organizations that we should consider implementing at UCR?
- Select one of our objectives and identify at least five action items that are needed to be successful.



DISCUSSION TOPIC #1

2-MINUTE REPORT OUTS

02:00

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 Breaktime for PowerPoint by Flow Simulation Ltd.

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DISCUSSION TOPIC #2: UA ENGAGEMENT SURVEY RESULTS

KIM MCDADE & JOSH CARTER



2023 University Advancement Employee Engagement Survey

Background

- Employee engagement is the emotional commitment an employee has to the organization and its goals
- Gallup defines engaged employees as those who are involved in, enthusiastic about and committed to their work and workplace
- Not punitive
- Designed to highlight areas of success, inform areas for improvement, benchmark progress over time



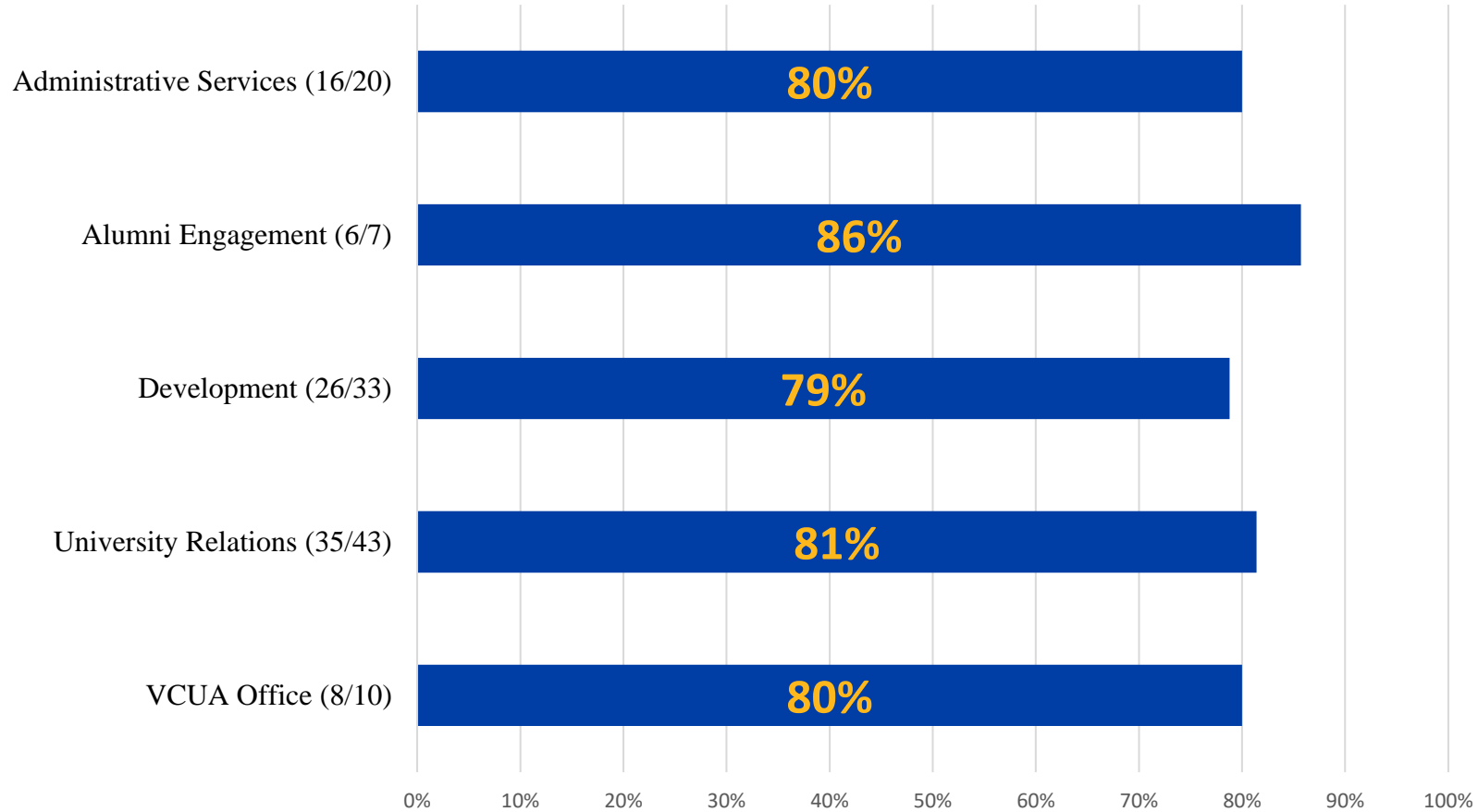


Key Metrics

- 113 invitations sent
 - Last year, 109 invitations sent
- 91 surveys submitted (81%)
 - Last year, 96 surveys submitted (88%)
- Survey period: 2/17 – 3/6/2023
- Survey format
 - 19 closed-ended questions
 - 1 open-ended question
 - 43 individuals submitted



Participation Rate of Units



Employee Engagement

2023 UCR UA Engagement Survey

Feb 17, 2023 - Mar 06, 2023

Reporting Group: Direct | All - All

Q¹² Mean

The Gallup Q¹² score represents the average, combined score of the 12 elements that measure employee engagement. Each element has consistently been linked to better business outcomes.

RESPONDENTS

91

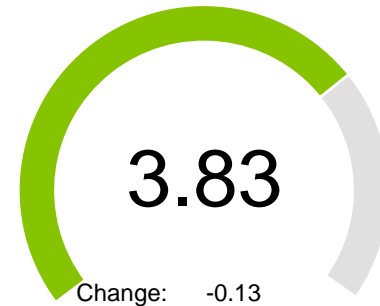
MEAN PERCENTILE RANK

46

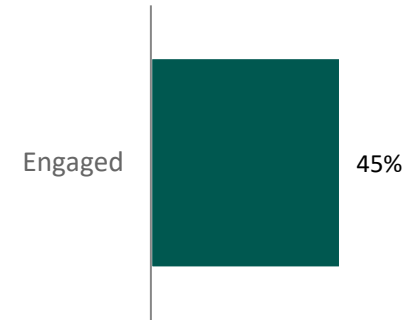
Database: Industry - Education - Postsecondary/Higher Education



ENGAGEMENT MEAN



ENGAGEMENT INDEX



*All text analytics are machine generated. Because we use machine learning to generate sentiments, results may not be 100% accurate.

*Percent Engaged available when n ≥ 30. All categories available when n ≥ 100.

* - Scores are not available due to data suppression. Respondents can select multiple responses for multi-select questions.

Percentile Rank in Industry - Education - Postsecondary/Higher Education Database

< 25th Percentile 25-49th Percentile 50-74th Percentile 75-89th Percentile ≥ 90th Percentile

Gallup Q¹² Items

Questions	Respondents	Current Mean	Last Mean	Change	Mean Percentile Rank - Industry - Education - Postsecondary/Higher Education	Company Overall Current Mean
Q00: Overall Satisfaction	91	3.64	3.94	▼ -0.30	32	3.64
Q01: Know What's Expected	91	3.79	4.28	▼ -0.49	13	3.79
Q02: Materials and Equipment	91	4.05	4.15	-0.10	49	4.05
Q03: Opportunity to do Best	91	3.73	4.01	▼ -0.28	31	3.73
Q04: Recognition	89	3.63	3.91	▼ -0.28	59	3.63
Q05: Cares About Me	90	4.28	4.34	-0.06	54	4.28
Q06: Development	91	3.77	3.86	-0.09	45	3.77
Q07: Opinions Count	91	3.48	3.79	▼ -0.31	32	3.48
Q08: Mission/Purpose	91	4.18	4.27	-0.09	62	4.18
Q09: Committed to Quality	90	4.22	4.15	0.07	54	4.22
Q10: Best Friend	85	3.47	3.39	0.08	60	3.47
Q11: Progress	89	3.55	3.67	-0.12	39	3.55
Q12: Learn and Grow	90	3.79	3.74	0.05	39	3.79



*Not shown if n < 4 for Mean, Top Box, Verbatim Responses, and Sentiment, n < 10 for Frequency, or data is unavailable.

* - Scores are not available due to data suppression. Respondents can select multiple responses for multi-select questions.

Percentile Rank in Industry - Education - Postsecondary/Higher Education Database

■ < 25th Percentile
 ■ 25-49th Percentile
 ■ 50-74th Percentile
 ■ 75-89th Percentile
 ■ >= 90th Percentile

Custom Questions

Questions	Respondents	Current Mean	Last Mean	Change	Mean Percentile Rank - Industry - Education - Postsecondary/Higher Education	Company Overall Current Mean
There is open communication throughout all levels of my organization.	90	2.82	3.20	▼ -0.38	42 	2.82
The performance appraisal process at my organization is transparent and fair.	84	3.18	3.28	-0.10	*	3.18
My manager inspires me to do more than I thought I could.	88	3.72	3.60	0.12	*	3.72
My workplace has systems in place to encourage collaboration.	91	3.64	3.97	▼ -0.33	*	3.64
I am asked for my input regarding changes that affect my work.	91	3.13	3.57	▼ -0.44	30 	3.13
My current UA flexible work arrangement contributes to my job satisfaction.	89	4.29	4.77	▼ -0.48	*	4.29
I am satisfied with my ability to engage with UA colleagues in our current environment.	91	4.02	4.50	▼ -0.48	*	4.02

*Sentiment Distribution is not available when n<50

*Not shown if n < 4 for Mean, Top Box, Verbatim Responses, and Sentiment, n < 10 for Frequency, or data is unavailable.

* - Scores are not available due to data suppression. Respondents can select multiple responses for multi-select questions.

Percentile Rank in Industry - Education - Postsecondary/Higher Education Database

■ < 25th Percentile
 ■ 25-49th Percentile
 ■ 50-74th Percentile
 ■ 75-89th Percentile
 ■ >= 90th Percentile

Heatmap

2023 UCR UA Engagement Survey																								
Percentile Rank in Industry - Education - Postsecondary/Higher Education Database																								
Direct Current Mean			■ < 25th Percentile ■ 25-49th Percentile ■ 50-74th Percentile ■ 75-89th Percentile ■ >= 90th Percentile																					
Teams	Variables	Variable Values	Total Respondents	Q12 Mean	Q00. Overall Satisfaction	Q01. Know What's Expected	Q02. Materials and Equipment	Q03. Opportunity to do Best	Q04. Recognition	Q05. Cares About Me	Q06. Development	Q07. Opinions Count	Q08. Mission/Purpose	Q09. Committed to Quality	Q10. Best Friend	Q11. Progress	Q12. Learn and Grow	There is open communication throughout the	The performance appraisal process	My manager inspires me to do more	My workplace has systems in place	I am asked for my input regarding c	My current UA flexible work arrang	I am satisfied with my ability to eng
Overall			91	3.83	3.64	3.79	4.05	3.73	3.63	4.28	3.77	3.48	4.18	4.22	3.47	3.55	3.79	2.82	3.18	3.72	3.64	3.13	4.29	4.02
Overall	Department	Administrative Services	16	3.84	3.75	4.00	4.25	4.06	3.53	4.13	3.94	3.50	3.88	4.00	3.25	3.63	3.88	3.00	3.33	3.88	3.63	3.19	4.38	4.25
		Alumni Engagement	6	4.11	3.83	3.67	3.83	3.83	4.33	5.00	4.17	4.00	4.33	4.33	3.80	3.67	4.33	3.50	3.80	4.50	4.33	3.17	4.50	3.83
		Development	26	3.02	2.54	2.69	3.15	2.46	2.81	3.58	3.00	2.23	3.81	3.76	3.04	2.85	2.84	1.50	2.50	2.80	2.81	1.85	3.96	3.54
		University Relations	35	4.36	4.37	4.57	4.63	4.54	4.00	4.74	4.23	4.37	4.54	4.57	3.83	4.03	4.29	3.71	3.59	4.09	4.20	4.14	4.74	4.40
		VCUA Office	8	3.90	3.63	3.63	4.25	3.50	4.38	4.38	3.63	3.25	4.25	4.50	3.43	3.57	4.00	2.50	3.00	4.13	3.38	2.75	3.00	3.63
	Length of Employment	<3 years	42	4.07	4.05	3.90	4.10	3.90	4.00	4.60	4.21	3.93	4.24	4.43	3.39	4.00	4.20	3.15	3.29	4.05	3.81	3.55	4.44	4.17
		3-6.99 years	28	3.63	3.18	3.64	3.79	3.50	3.39	4.04	3.39	3.07	4.14	4.00	3.64	3.43	3.54	2.50	2.86	3.35	3.57	2.71	4.04	3.96
		7 years or more	21	3.59	3.43	3.76	4.33	3.67	3.20	3.95	3.38	3.14	4.10	4.10	3.37	2.80	3.33	2.62	3.43	3.50	3.38	2.86	4.33	3.81

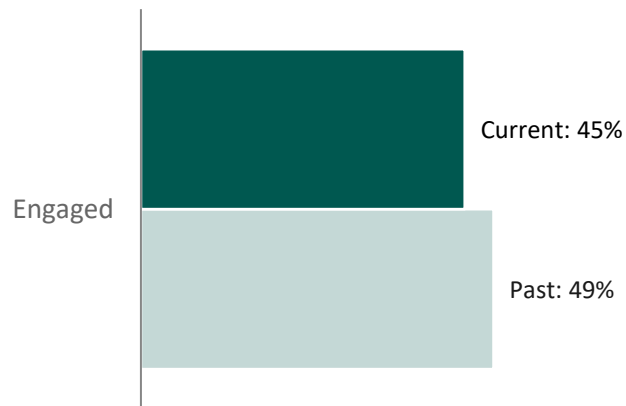
Engagement Index

There is a powerful link between employees who are engaged in their jobs and the achievement of crucial business outcomes.

ENGAGEMENT INDEX RATIO

*

ENGAGEMENT INDEX



Engaged

Employees are highly involved in and enthusiastic about their work and workplace. They are psychological "owners", drive performance, innovation, and move the organization forward.

Not Engaged

Employees are essentially psychologically unattached to their work and company. Because their engagement needs are not being fully met, they're putting time – but not energy or passion – into their work.

Actively Disengaged

Employees aren't just unhappy at work – they are resentful that their needs are not being met and are busy acting out their unhappiness. Every day, these workers potentially undermine what their engaged coworkers accomplish.

*Percent Engaged available when $n \geq 30$. All categories available when $n \geq 100$.

* - Scores are not available due to data suppression.

Respondents can select multiple responses for multi-select questions.



Next Steps

- Employee Engagement Group has been given the dataset and the following charge:
 - What conclusions can we draw from the data?
 - Assess all current employee engagement activities – what should we continue and what should we discontinue?
 - What two or three things should we focus on for improvement this year (new initiatives or enhancements)?
 - How can we learn more about the items that continue to score lowest?
- Department Heads have department specific survey results
- Break-Out Discussions at tables



EMPLOYEE ENGAGEMENT WORKGROUP



Danny Arbanas



Brock Cavett



Imran Ghori



Kelly Kraus-Lee



Heather Morales



Erin Staley



Vanessa Torrez



Brandon Westenberger



Sandra Mora
Coordinator



DISCUSSION TOPIC #2

Identify one member at your table to be a scribe.

Identify one member at your table to report out after discussion.

- How can we continue to actively engage our UA staff?
- How can we improve our efforts to actively engage our UA staff?
- What thoughts, suggestions, and ideas would you provide to the employee engagement group members as it relates to the engagement survey overall for UA?



DISCUSSION TOPIC #2

2-MINUTE REPORT OUTS

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END OF DAY 1

REMINDER

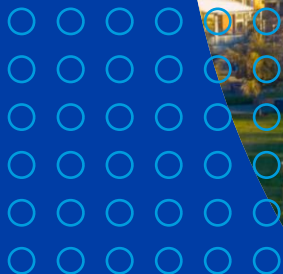
- If you're participating in Paint and Sip activity tomorrow, wear paint friendly clothes and dress for the weather!



WELCOME

APRIL 21, 2023

UNIVERSITY ADVANCEMENT
FY23 RETREAT







**ICEBREAKER HOSTED BY
UA DEIB COMMITTEE & EMPLOYEE
ENGAGEMENT GROUP**

COWORKER FEUD

You may have heard of Family Feud;
this is coworker feud!

RULES

- We'll take turns by table.
- Decide as a group which answer you want to give. Points will vary.
- The table with the most points at the end wins pride 😊.

INVITING CHATGPT

- ChatGPT is a large language model
- Commonly called “artificial intelligence”
- Extremely robust google autocomplete
- Let’s see what we can do with it!

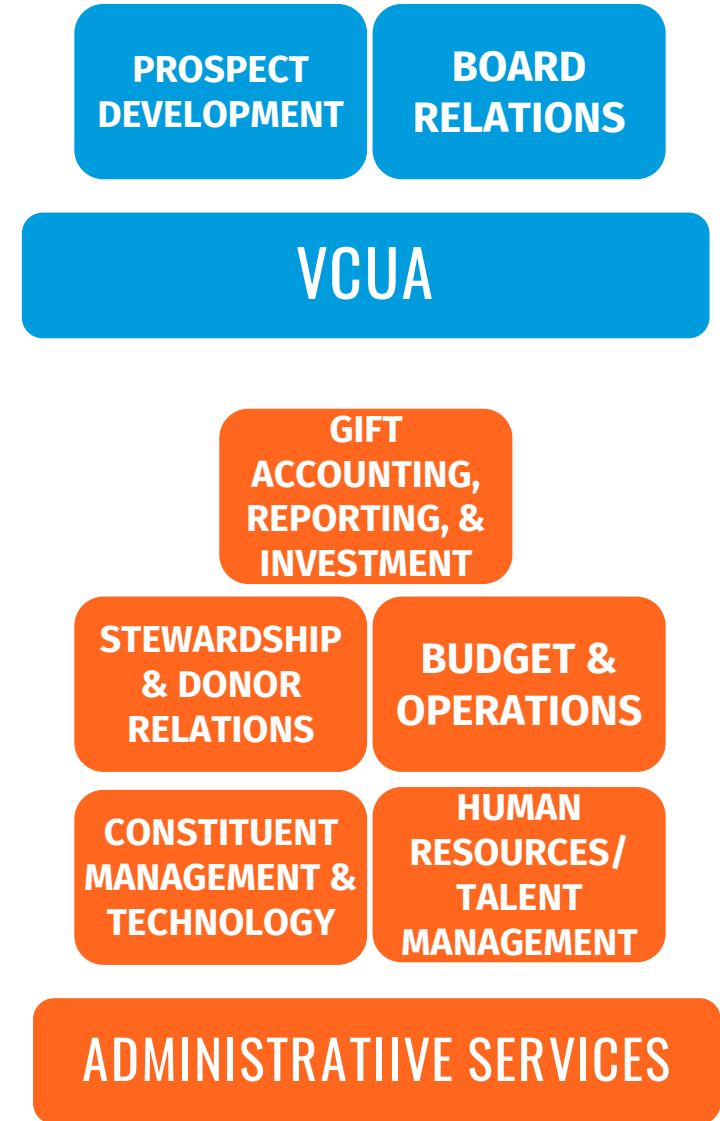


FY24 PLANNING TEMPLATES & BUDGET REQUESTS

KIM MCDADE & JOSH CARTER

OPERATING PLANS

EACH UNIT CREATES FY24 OPERATIONAL PLAN & BUDGET REQUEST





PROCESS

FY24 Operational Plans & Budget Requests are due by Friday, June 2, 2023.

- Templates will be distributed to all staff via email following this retreat
- Optional “brown bag” lunch and learn sessions in early May for any that would like to ask questions about the templates
- Purpose:
 - Define FY24 major initiatives
 - Set measurable goals in line with UA objectives
 - Integrated event/communications calendar
 - Budget tied to objectives/ROI



**UNIVERSITY RELATIONS
ADMINISTRATIVE SERVICES
VCUA**

OPERATING PLAN – NON-DEVELOPMENT

01 MAJOR PROJECTS/INITIATIVES
Define the significant projects that your team will be committing to in the upcoming year

MAJOR PROJECTS/INITIATIVES

	FY 24 Major Projects/Initiatives
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

OPERATING PLAN – NON-DEVELOPMENT

02 GOALS & OBJECTIVES

Identify 3-5 specific objectives for your team that impact our UA key performance indicators

FISCAL YEAR 2024 GOALS & OBJECTIVES

I. **Fiscal Year 2024 Goals & Objectives** – please identify 3-5 specific objectives for your team in line with UA and UCR strategic priorities (reference how your goals advance UA KPIs).

[Overall Goal]
Objective: Metric: •
Objective Metric: •
Objective: Metric: •



DEVELOPMENT

OPERATING PLAN – DEVELOPMENT

Slightly different template for Annual Giving, CFR, Constituency Programs, and Planned Giving/Regional/Principal Gifts

01 TEAM FUNDRAISING GOALS

Detail FY23 goal and results, then set a fundraising goal for FY24

UNIT/TEAM FUNDRAISING RESULTS & GOALS

	FY22/23 Goal	FY22/23 Results	FY 23/24 Goal
FY Total	\$	\$	\$
A. Cash & Pledges	\$	\$	\$
In-Kind Gifts	\$	\$	\$
B. Planned Gifts	\$	\$	\$
• <i>Irrevocable Life Income Agreements</i>	\$	\$	\$ Subset of B
• <i>Bequest Commitments</i>	\$	\$	\$ Subset of B
Dollars by Objective Summary	\$	\$	\$
C. Expendable	\$	\$	\$
D. Endowment	\$	\$	\$
E. Facilities	\$	\$	\$
# Donors			

OPERATING PLAN – DEVELOPMENT

Slightly different template for Annual Giving, CFR, Constituency Programs, and Planned Giving/Regional/Principal Gifts

02 MAJOR INITIATIVES/SOLICITATIONS

Indicate your team's top initiatives or solicitations planned for FY24

UNIT/TEAM MAJOR FUNDRAISING INITIATIVES

	FY 23/24 Major Fund Raising Projects/Initiatives or Solicitations
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

OPERATING PLAN – DEVELOPMENT

Slightly different template for **Annual Giving**, **CFR**, **Constituency Programs**, and **Planned Giving/Regional/Principal Gifts**

03 YEAR IN REVIEW & GOAL SETTING

Reflect on FY23 accomplishments, challenges, and unmet need; Identify 3-5 specific objectives for your team designed to advance UA key performance indicators

FISCAL YEAR 2022/2023 IN REVIEW

- I. **Fiscal year 2022/2023 in Review** – please use bullet points to highlight unit/team accomplishments achieved in fiscal year. Examples include:
 - a. Amount raised, # of 6-figure and 7-figure gifts;
 - b. # of new endowments created; #/titles of new endowed positions;
 - c. Progress against priorities and key achievements
 - d. Success moving KPIs year over year

- II. **Challenges** – *as appropriate*

- III. **Unmet Need in 2022/2023** – highlight unmet funding priorities/other key goals that your unit/region will focus on during FY23/24. What are your strategies around these priorities? (**List no more than 5**)

- IV. **Fiscal Year 2023/2024 Goals & Objectives** – please identify 3-5 specific objectives for your team/unit in line with UA and UCR strategic priorities (reference how your goals advance UA KPIs).

OPERATING PLAN – DEVELOPMENT

Slightly different template for Annual Giving, CFR, Constituency Programs, and Planned Giving/Regional/Principal Gifts

04 PORTFOLIO REVIEW/PROSPECT WORKBOOK

For teams that carry portfolios, complete prospect workbook and portfolio review – should look familiar, these were used in vision session process.

2023-2024 Prospects					
Row Count	ID Number	Prospect Name	Prospect Type (Individual (I)/ Organization (O))	Strategic Objective	Funding Designation
1		John Doe	I - Friend	Secure the \$1 million for scholarships, 2) Consider building excavation plan, 3) Cultivate for \$25 million for Entrepreneurship/Engineering	Scholarship, etc.
2					
3					
4					
5					
6					
7					
8					
9					

UNIT/TEAM PORTFOLIO REVIEW

		23/24 Goal
A	Number of Prospects in your portfolio (Total of Primary/Secondary assignments)	Projected PRIMARY= SECONDARY=
B	Number of Significant Personal Visits	Projected
C	Number of Discovery Visits <i>Note that this is a subset of SPV's</i>	Projected
	Number of Discovery Qualification Outcomes: <ul style="list-style-type: none"> Qualified: Short Term Disqualified: Permanent Disqualification: <i>Note that the above outcomes should only be used in Prospect Stage Discovery</i>	Projected TOTAL of Qualification Outcomes TOTAL =



ALL OF UNIVERSITY ADVANCEMENT

BUDGETING – ALL UNITS

01 Budget Templates Will Be Distributed To Department Heads

Templates similar to last year

02 Zero-based Budget Approach

Not incremental from prior year

03 Line-Item Budget Requests

Include how request aligns with strategic objectives

04 One-Time Funding Requests

Opportunity to request one-time funds for specific one-time initiatives

05 Budget Requests Reviewed

Budget and Operations team will summarize requests from all departments
UALT to discuss requests and funding available in June

06 Budgets Approved

Budget and Operations to allocate budgets based on UALT decisions in new Oracle system in July

OPERATING PLAN – BUDGET

01 BUDGET REQUEST

Complete team budget request in line with defined team objectives

A	B	C	D	E	F	G
1	Department					
2	TEAM					
3	WORKING BUDGET					
4						
5				SUMMARY		
6				FY 2022/23		FY 2023/24
7				Approved Budget	Projected Expenses	Requested Budget
8				\$ 355,993	\$ 375,303	\$ -
9	A01511- Operations					
10	Category/Description	Flex Field (New Cost Center)	Approved Budget	Projected Expenses	Requested Budget	Justification
11	Freelance Agreements	D01183FREE	25,000	20,974		
16	Office Supplies, Gen. Ops & Services			-		
17	Equipment- Hardware/Software/Video Prod	D01183GEOP	23,350	29,649		
18	Office Supplies - General	D01183GEOP		914		
19	Copier Lease/Supplies/Operating	D01183GEOP	4,000	3,747		
20	Cell phones	D01183GEOP	2,700	2,965		
21	Digital Newspaper	D01183GEOP	1,800	4,532		
22	Insignia Items	D01183GEOP		(383)		
23	Misc.	D01183GEOP	500	33		
24	Employee Morale	D01183TEAM	1,000	433		
25	Alumni Regional Events			-		
26	Travel (Media/Staff) - Non Prof Develop	D01183REGN	13,000	9,962		
27	Remote Employee Travel - ERIN	D01183REGN				
28	Meetings/Retreat			-		
29	Staff Meetings Expenses**	D01183MEET	800	685		
30	Staff Retreat	D01183MEET	5,050	2,500		
31	Campus Comm./Mkt Conf.	D01183MEET	-	1,335		

OPERATING PLAN – CALENDAR

02 INTEGRATED CALENDAR

Add planned events and communications to an integrated UA calendar and define mass communication strategy/purpose

COMMUNICATIONS & EVENTS

- I. **2023/2024 Communication & Event Calendar** – As a team, please add dates for all mass communications and events to the **Integrated UA Calendar workbook**. ([separate document](#))
- II. **Communication/Event Strategies** – As a team, please elaborate on the strategic objectives achieved with any mass communications and events. Identify the communication/event major objective, categorized as follows:
 - a. Awareness
 - b. Engagement
 - c. Fundraising
 - d. Stewardship

Each objective should include the following, where applicable:

- a. Purpose Statement (Theme)
- b. Strategy
- c. Funding Priorities
- d. Audience
- e. UA Staff or Partner Involvement
- f. Direct Cost
- g. Timetable (Frequency)
- h. Projected Revenue
- i. Support Services Needed (e.g., need, timetable, direct cost)

QUESTIONS OR COMMENTS?





DISCUSSION TOPIC: BUILDING UCR AFFINITY WITH CONSTITUENCY GROUPS

JORGE ANCONA & ANNYA LOTT



DISCUSSION TOPIC

Identify one member at your table to be a scribe.

Identify one member at your table to report out after discussion.

- Each table is assigned one of the following groups:

ALUMNI &
FRIENDS

STUDENTS

PARENTS

- Answer discussion prompts distributed to your table based on assigned group.



DISCUSSION TOPIC

2-MINUTE REPORT OUTS

02:00

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 Breaktime for PowerPoint by Flow Simulation Ltd.

Pin controls when stopped



Q&A WITH UALT



Q&A WITH UALT

To ask a question, raise your hand and a microphone will be brought to you.

To ask an anonymous question, use this form:





STAFF DEPARTURES



FAREWELL!

Goodbye
&
Good Luck

JEFF KAATZ
CLYDE DERRICK

ADJOURN – THANK YOU!

THIS AFTERNOON

- Enjoy lunch!
- At 1PM there will be refreshments on the patio – all are welcome to socialize.
- Those participating in Paint and Sip activity – we will gather on the lawn at 1PM to begin.

