



University Advancement

WELCOME

MARCH 6, 2025
UNIVERSITY ADVANCEMENT
ALL-STAFF RETREAT



INTERIM VCUA REMARKS

Johnny Cruz

Interim Vice Chancellor, University Advancement



CHATGBT'S FAVORITE ADVANCEMENT CLICHES

"Have you tried asking [insert famous billionaire]?"

"Can you just pull that report real quick?"

"Why don't you just get a big corporate sponsor?"

"Can you make this go viral?"

"Why don't you get more famous alumni involved?"

"I know it's last minute, but can you generate a custom list for me?"

"We need to get into the New York Times."

"Can't we just move the money into a different fund?"

"Just do more events."

"Can you make it pop?"

"Can't you just Google their new address."



Normalcy



LEADERSHIP EMPHASIS

- Do the essentials well
- Focus on relationships
- Build a healthy organization
- Provide value to the university



Do the essentials well



Focus on relationships



Build a healthy organization

Principles for Managers

01 Grow Staff to Fullest Potential

04 Eliminate Complexity

02 One Team (no “us” vs. “them”)

05 Leaders Do and Don’t Just Direct

03 Welcome High Expectations & Value High Performance

06 Coach and Bust Barriers



Provide value to the university



Pop Quiz: How many public AAU universities are located within 15 minutes of a coastline or have a football team?



“Ginger Rogers did everything Fred Astaire did, but backwards and in high heels.”

YOU MAY BE WONDERING

01 VCUA Search Timeline

02 Chancellor Transition

03 Salesforce

04 Impact of Federal Changes

05 DEI

06 Budget

07 Remote and Hybrid Work



MAKING IT WORK



THANK YOU!



LIGHTNING ROUNDS FT. UA TEAMS



UCR MAGAZINE

Sarah Nightingale, Assistant Director, Content & Publications

Jessica Weber, Editor





MISSION STATEMENT

Published quarterly, UCR Magazine keeps alumni, friends, and community members connected.

A reflection of our diverse, inclusive, and vibrant campus, the magazine celebrates our people — from the first-generation students who are trailblazers in their families and communities, to alumni who are rising to the top of their fields, to innovative researchers who ask, “How can we make this world a better place?”

As one of the nation’s top research universities and first for social mobility, there are so many good stories to tell that the hardest part of our jobs is often choosing who and what to feature.

OVERVIEW

Audience, distribution, and formats

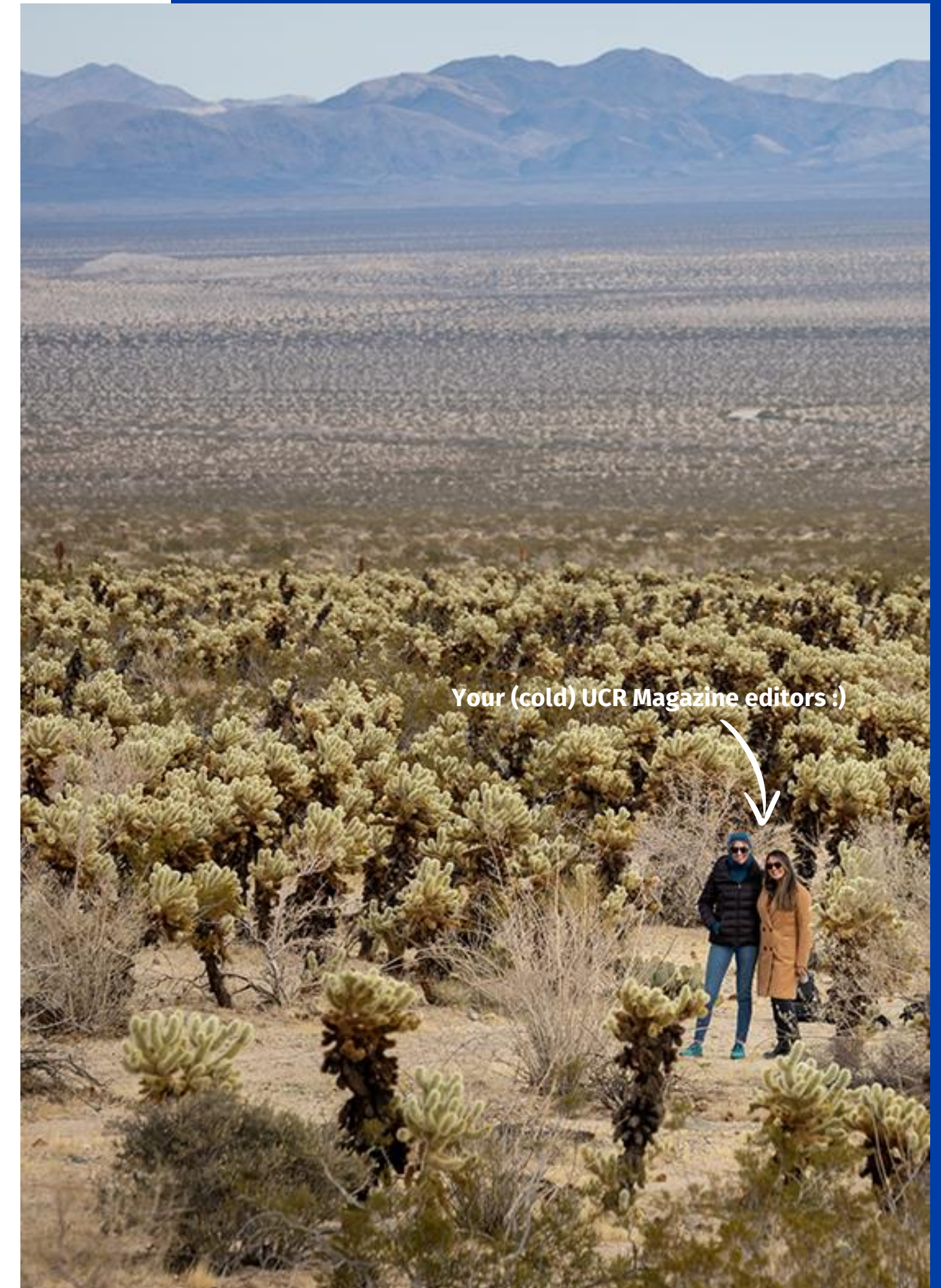
- Institutional magazine meant to highlight the full scope of UCR for the entire campus community and beyond
 - Audience: alumni, students, faculty, staff, donors, and “friends”
- Print issues mailed to over 130K recipients
 - Grows each year with # of grads
 - Campus distribution approx. 2000 per issue
- 2x print issues per year (spring and fall)
 - 40 pages + front/back cover
 - Includes an online version
 - Includes gift envelope
 - Most recent print issue received \$10K gift
- 2x online-only issues per year (summer and winter)
 - Online iteration continuing to evolve



MAGAZINE PRODUCTION

Team and processes

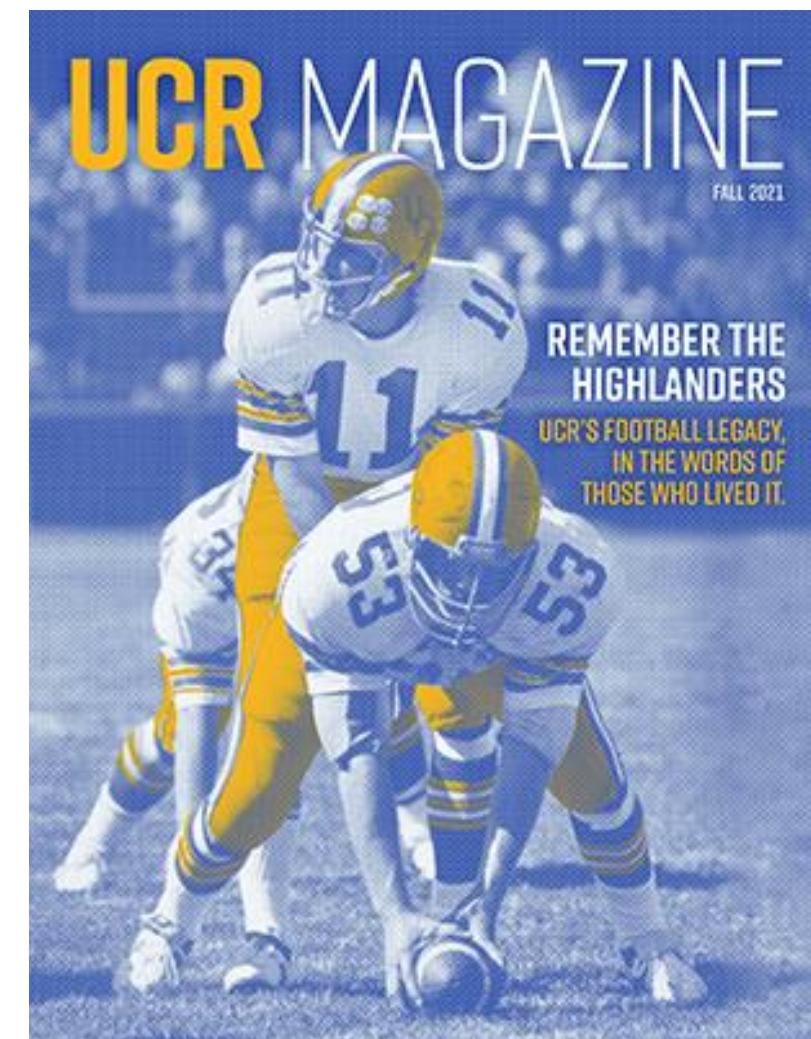
- In-house magazine team
 - Two UREL staff members (us) specifically dedicated to the magazine, among other editorial duties for UCR News team
 - Writing: Primarily us and our news team writers with occasional articles from freelancers
 - Editing/Proofreading: in-house by us with final proofing help from news team
 - Video/Photography: in-house video team and Stan Lim
 - Design/Art Direction: in-house design team
- Editorial calendar
 - Developed and finalized by editors
 - Features and cover stories may be scheduled up to 1 year in advance
- Production cycle
 - Approx. 3 month production cycle per issue (year round)
 - Writing/Editing: Approx. 1.5-2 months (with research, interviews, photo and video shoots happening before/during)
 - Design: Approx. 1 month (on rolling basis), including several rounds of revising and proofing
 - Printing/Publication: Approx. 2 weeks from printing to mailing/launch



PRINT ISSUES

Spring and Fall

- Cover story + 4-6 features
- Recurring departments: Office Hours, Alumni Profile, Student Spotlight, By the Numbers, etc.
- Focus on offering a broad range of UCR stories across various colleges/departments and demographics
 - Mix of science, humanities, alumni stories, student achievements, campus news, etc.
 - Goal to provide balanced representation of the many corners of UCR, showcasing novel research and exemplary individuals
- Occasional themed packages highlighting cross-disciplinary research and campuswide initiatives (ex. 40 Under 40)



ONLINE-ONLY ISSUES

Summer and winter

- Recently shifted to 2x per year in response to rising print costs
- Narrower scope with stories highlighting a specific theme or area (Highlanders in Hollywood, Food for Thought, Eaton Collection)
 - Focused on popular/trending topics geared more toward general public/media (ex. film/TV, food research, sci-fi/fantasy)
 - Goal to grow online magazine readership and interest
- More opportunity experiment with multimedia and unique ways to tell stories in a digital format (ex. themed landing pages, photo slideshows, video profiles)
- 3 online-only issues published so far, most recently winter 2025 in late February
 - Online iteration continues to evolve



STORYTELLING

Selection, development, and goals

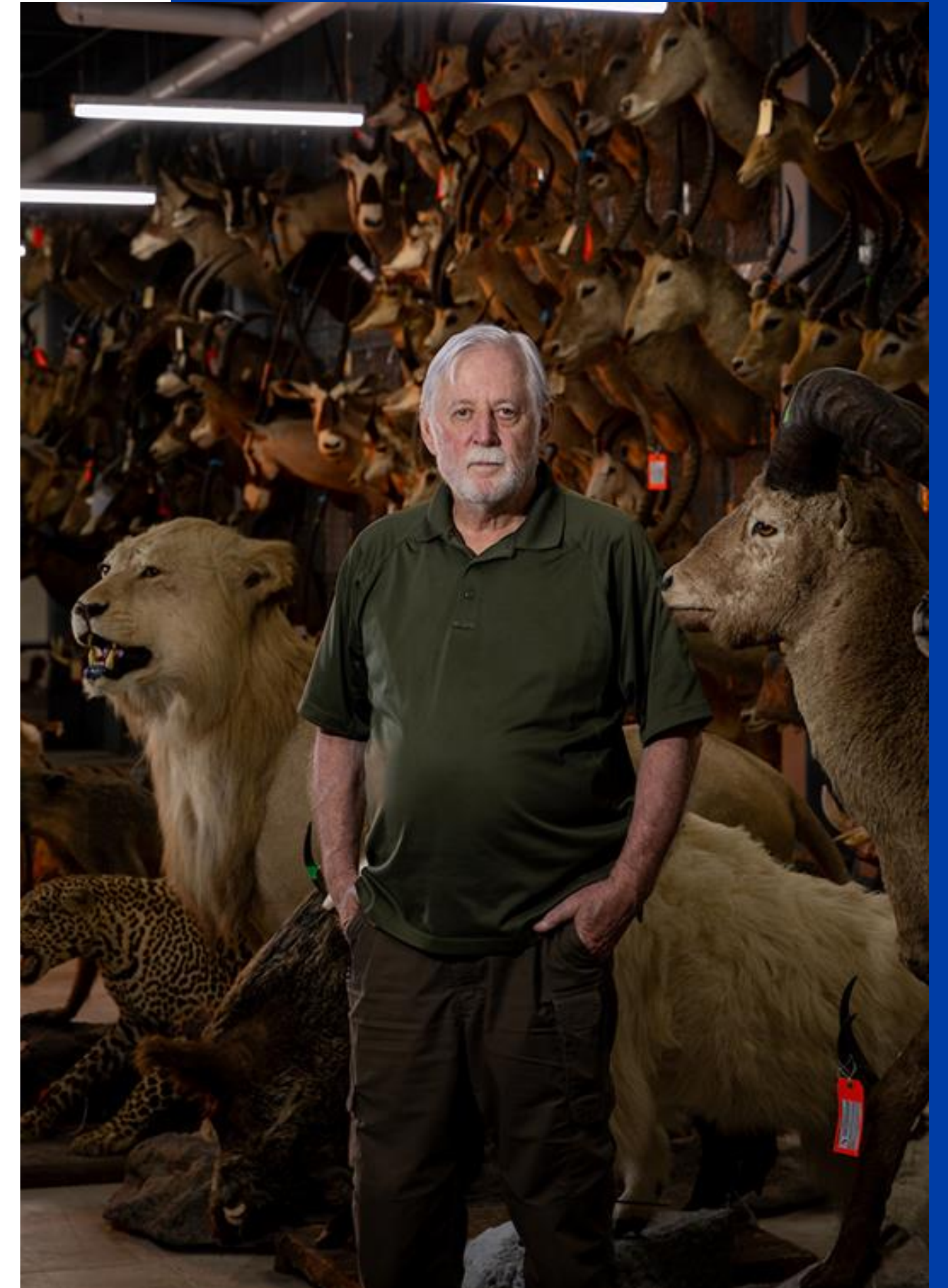
- Types of stories we feature:
 - Novel UCR research/initiatives making a large impact locally/globally (ex. Salton Sea research)
 - Compelling alumni, student, faculty, and staff stories
 - Stories highlighting big campus news (ex. North District)
 - Stories that are distinctly UCR
- What we look for:
 - People focused/centered stories over macro-level overviews
 - Stories/topics that would appeal to our wide/diverse audience (ex. dementia research)
 - New, unique, diverse perspectives and voices
 - Stories with “legs” (opportunities for further engagement and collaboration)
- We keep a running log of story ideas to build out our editorial calendar
 - Sourced from our news team/our own research, suggestions from colleagues, faculty, and alumni, etc.



HIGHLIGHTS

Successes, partnerships, and impact

- 40 Under 40 partnership across UA/campus recognizing young alumni garnered high engagement and new/renewed connections with alumni as well as a Best of CASE District VII Award win.
- The “Baers and the Bees” fall 2022 cover story was brought by Kathy Eiler during a 2023 trip to Washington DC to help push the Farm Bill, with talks of delegations from congress coming to visit UCR in the future. The accompanying video on the Baers was also shared across several beekeeping organizations.
- UCR Hollywood issue inspired Alumni Night at Academy Museum with featured alum Chris Morgan (“Fast and Furious” screenwriter) as one of the special guests. Featured alum and trans actor Shakina Nayfack (“Transparent,” “Difficult People”) also returned to UCR for the first time to host the Dragalicious Drag Ball 20-year celebration.
- Alumni profile on Peggy Merritt, one of Alaska fish and game’s first female field biologists, resulted in her being flown from Alaska by UCR’s biology dept. to give a seminar and meet with UCR students over a few days.
- The Fall 2024 cover story on alum Ken Goddard resulted in him signing a contract with TV producer (and fellow UCR alum) Ted Gold to authorize him to produce a series titled “Wildlife Crime” based on his life story.





HAVE A PITCH FOR US?

We are always looking for more stories!
Feel free to email us with your ideas.

sarah.nightingale@ucr.edu
jessica.weber@ucr.edu

MAGAZINE.UCR.EDU

Annual Giving

Development

Annual Giving

Meet the team



Crystal Sankey

Senior Director of Annual Giving



Marianne Paek

Director of Annual Giving



Brandon Medeiros

Associate Director of Annual Giving

Annual Giving

What we do

Annual Giving is housed under Development, which is responsible for raising public awareness of UCR's excellence in research, teaching, and service, ultimately promoting and securing public and private support for the university.

Our office raises private support for gifts up to \$25,000 using communication channels, including direct mail, email, crowdfunding, giving days, texting, and social ads, magazine and more!





UCR

GIVE DAY

MARCH 4-5

#UCRGiveDay



Alumni Engagement

- Advocate Recruitment
- Local IE Alumni Network Event @ Carbon Nation Brewing
- SAA tabling and promotion
- Highlander Family Network Give Day promo
- Give Day Promotion (Alumni newsletters, Alumni events etc.)



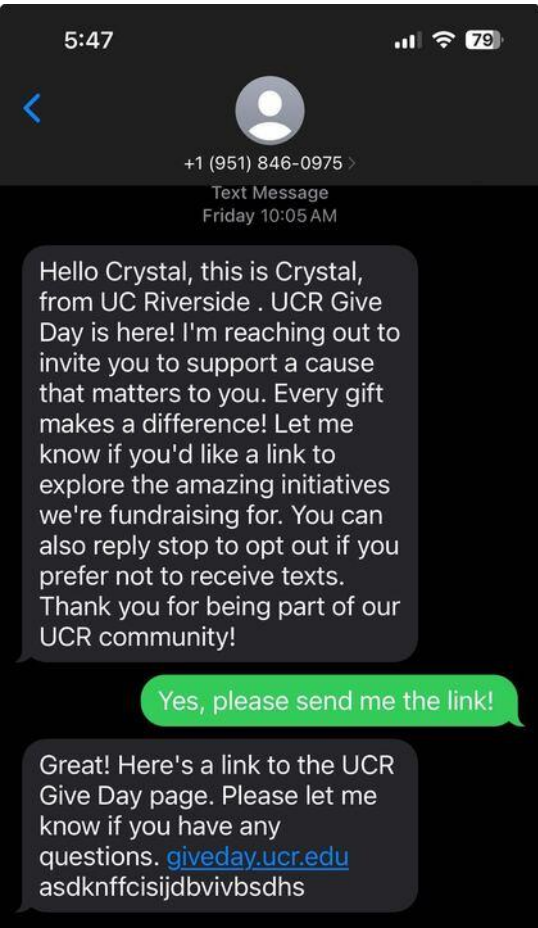
Constituent Management & Technologies (CMT)

- MailChimp emails
- Data pulls (emails, SMS campaigns)
- Offline gift uploads
- Final results reporting
- ImportOmatic process – moving GiveCampus gifts to RE



YOY Give Day Results FY23 and FY24

CATEGORY	FY23	FY24	Percentage Change
Number of gifts:	1,713	1,576	-8.00%
Number of donors:	1,255	1,249	-0.48%
Total dollars raised:	\$512,670.15	\$797,358.27	55.53%
Average gift amount:	\$299.28	\$505.94	69.05%
Number of gifts from G.O.L.D.s:	190	91	-52.11%
Farthest gift:	Hong Kong	India	
Number of funds supported:	154	202	31.17%
Number of Champions:	59	147	149.15%
Active champion accounts	43	80	86.05%



Crystal,

UCR Give Day is your chance to invest in a bold and brilliant future and **support the causes in our community that matter most to you.** 150,000+ Highlanders strong, UCR is a hub of bold ideas, groundbreaking research, and

Corporate Foundation Relations

- Sponsorship one-pager
- Challenge gifts and incentives from organizations like SchoolsFirst Federal Credit Union and San Bernardino International Airport



UCR GIVE DAY MARCH 4-5 **SPONSORSHIP OPPORTUNITIES**

UCR Give Day is an online fundraising initiative running from Tuesday, March 4 to Wednesday, March 5. The purpose of UCR Give Day is to raise funds campus-wide to enhance student programs and the overall student experience at UC Riverside.

Dates: March 4 and 5, 2025 (12 a.m. to 9:54 a.m.)

WAYS TO ENGAGE

PRESENTING SPONSOR(S): \$10,000 <ul style="list-style-type: none">• Give Day website recognition as presenting sponsor• Feature in Give Day emails, reaching an audience of 174,000+ constituents• Hourly participation challenge named after sponsor (x2) or an unlocking challenge named after sponsor	GOLD SPONSOR(S): \$5,000 <ul style="list-style-type: none">• Give Day website recognition• Hourly participation challenge named after sponsor or an unlocking challenge named after sponsor• Feature in select Give Day emails, reaching an audience of 174,000+ constituents
SILVER SPONSOR(S): \$2,500 <ul style="list-style-type: none">• Give Day website recognition• Hourly participation challenge named after sponsor	BRONZE SPONSOR(S): \$1,000 <ul style="list-style-type: none">• Give Day website recognition













2024 UCR GIVE DAY BY THE NUMBERS:

\$797,358.27 DOLLARS RAISED	1,576 GIFTS	1,249 DONORS	202 CAMPUS FUNDS SUPPORTED
FARTHEST GIFT INDIA	OUTREACH TO 174,000+ ALUMNI, STUDENTS, FACULTY, STAFF, PARENTS, AND FRIENDS	MORE THAN 50,000 SOCIAL MEDIA IMPRESSIONS	

UC RIVERSIDE TO SECURE YOUR SPONSORSHIP OR FIND OUT MORE, PLEASE CONTACT:
Tiffany Dana | 951-827-7490 | tiffany.dana@ucr.edu

Development

- Securing early gifts + challenge/match gifts
- Project page creation
- Promoting Give Day within their respective colleges/areas
- SMS campaigns to their portfolios & qualification pools

 <p>Areas of Greatest Needs</p> <p>115 Donors</p> <p>Online \$15,557 Donated</p>	 <p>Alumni Engagement</p> <p>113 Donors</p> <p>Online \$9,185 Donated</p>	 <p>Athletics</p> <p>29 Donors</p> <p>Online \$5,210 Donated</p>	 <p>Marian and Rosemary Bourns College of Engineering</p> <p>37 Donors</p> <p>Online \$6,130 Donated</p>
 <p>School of Business</p> <p>51 Donors</p> <p>Online \$9,515 Donated</p>	 <p>College of Humanities, Arts, and Social Sciences</p> <p>85 Donors</p> <p>Online \$11,252 Donated</p>	 <p>College of Natural & Agricultural Sciences</p> <p>127 Donors</p> <p>Online \$31,716 Donated</p>	 <p>Division of Undergraduate Education</p> <p>79 Donors</p> <p>Online \$10,320 Donated</p>
 <p>Education</p> <p>35 Donors</p>	 <p>Faculty and Staff Programs</p> <p>59 Donors</p>	 <p>Graduate Division</p> <p>6 Donors</p>	 <p>Health, Well-Being, & Safety</p> <p>34 Donors</p>

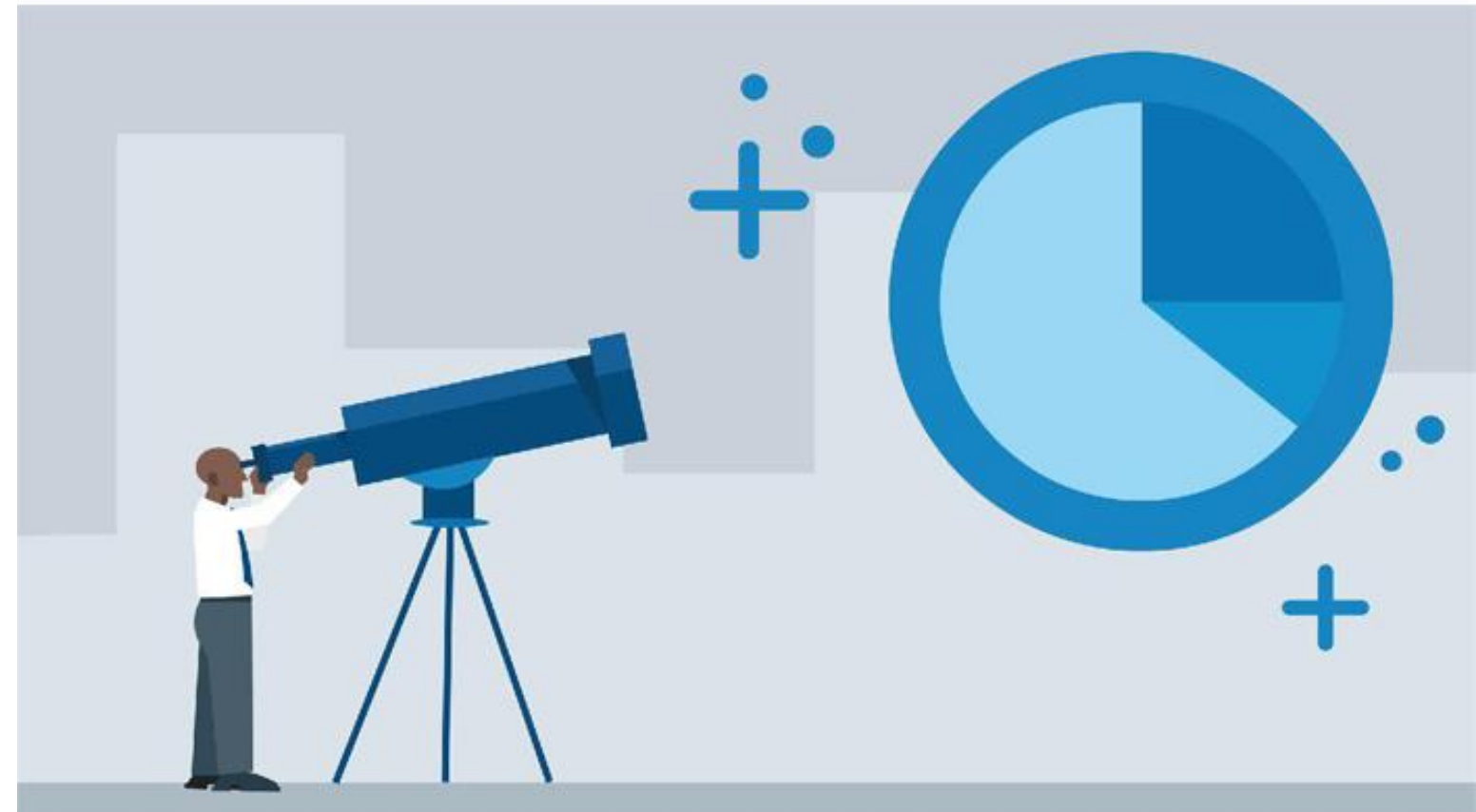
Gift Administration and Foundation Accounting

- Tracking and coding gifts
- ImportOmatic process – moving GiveCampus gifts to RE
- Processing all Give Day donations
- Fund management – identifying existing funds & creating new ones



Prospect Development

- Forecasting for Give Day goals
- DO lists for SMS campaigns



Stewardship and Donor Relations

- ThankViews
- Give Day Stewardship

WATCH YOUR VIDEO!




University Foundation Relations

- Encouraging Trustees to make gifts towards Give Day for central challenges

Bonus Challenges

More Challenges Await!

More ways to win and make an impact this Give Day! Take part in these fun challenges for a chance to direct bonus funds to the project of your choice.


 **Power Hours:** The project page with the most unique donors during each specified Power Hour will receive **\$1,000** applied to their project. These challenges will take place on:


- March 4, 2025, 5 AM to 7 AM PST
- March 4, 2025, 12 PM to 2 PM PST
- March 4, 2025, 6 PM to 8 PM PST
- March 5, 2025, 12 AM to 2 AM PST
- March 5, 2025, 6 AM to 8 AM PST


 **Early Bird:** Be the first donor on Give Day proper (Starting on March 4, 2025, at 12 AM PST) and earn the chance to designate **\$500** to the project page of your choice.


 **Procrastinator:** The last donor on Give Day (March 5, 2025, at 9:54 AM PST) will earn the chance to designate **\$500** to a project page of their choice.

 **Keep In Touch Challenge:** Update your contact info through our [Alumni & Friends Form](#), and you'll be entered into a drawing to designate **\$250** to a project page of your choice. **Five winners will be randomly chosen on March 5, 2025, at noon PST.**

 **Tag your #UCRiverside besties:** Tag your UCR besties, past or present, on our Give Day post (March 4, 2025, at 9 AM PST) on Facebook, Instagram, and LinkedIn! We'll randomly choose one of you & designate **\$250** on your behalf to give to your favorite area of campus today for #UCRGiveDay! **The winner for each social media platform will be chosen on March 5, 2025, at 11 AM PST.**

 **Hidden Scottys:** Play the game and find 5 Hidden Scottys across our Give Day website on March 4, 2025! The first **five** participants to collect all five will earn **\$200** each to designate to a project page of their choice. **Winners will be chosen by those who email annualgiving@ucr.edu with confirmation and screenshots of the 5 Hidden Scottys as proof.**

 **Class of 2025 Challenge:** Graduating students who donate \$25 to any UCR Foundation fund through the [Grad Class Giving philanthropy cord program](#) will have their gift matched with \$25 from the UCR Foundation Board of Trustees to Student Scholarships for up to 468 students. Each student's \$25 gift will be matched once.

 **Alumni Challenge:** If 400 alumni make a gift on UCR Give Day, an anonymous donor will contribute \$25,000 towards UCR Give Day!

University Relations

- Give Day assets – creation and design (encompassing all digital assets, templates, Canva assets, t-shirt, postcard, digital ads, physical ads)
- Copywriting and review for postcard, email series, and website content
- Inside UCR
- Chancellor's Newsletter
- Student Comms
- UCR Magazine
- events.ucr.edu
- Social media paid ads and organic posts
- Google Analytics and UTM's
- R'Space ad, updating vanity URLs, banner images



Dean's Checklist: UCR Give Day 2025

A 4-step guide to a successful Give Day
March 4 to 5, 2025

Dean's Top 4 on Give Day

Do these from March 4 to 5

- ☐ Make a gift at giveday.ucr.edu
- ☐ Be the signer of an email and send it out to your college/unit
- ☐ Share 1-2 posts on social media promoting your college/unit
- ☐ Post a thank you on social media after Give Day ends (ideally on March 6)

Other Considerations

Create a challenge/match for your unit.

When a Give Day match or challenge is present:

- 84% of donors are more likely to donate
- 1 in 3 donors are more likely to give a larger gift if there is a match or challenge

Common types of challenges or matches:

1. Unlock a certain amount of money, either by reaching a certain number of donors or the number of gifts.
2. Matching challenges such as 1:1 or 2:1 dollar match.

If you are interested in setting up a challenge or match, notify your Development lead before February 3, 2025, and they will contact Annual Giving to discuss and finalize challenge/match criteria.



Annual Giving





Thank you, UA
for your partnership!

Jira

New ticketing system for CMT



Service Portal

[CMT Helpdesk](#) / [CMT Requests](#)

CMT Requests

 Contact us about

Communications

Thank you for your service Email, Weekly Highlander Tickets Email Blast, VPDUE Newsletter, RED Newsletter, Highlander Impact Network, Highlander Family Network Newsletter, CNAS UAAC Newsletter, CNAS Newsletter, BCOE Career Corner, Botanic Gardens eNews, BCOE Student Organization Newsletter, BCOE Newsletter, Alumni Newsletter, AAPI Alumni Newsletter, Birthday Donor E-Blast, School of Education Newsletter, Custom Email Blast, CNAS ECHO SIR'd Student Newsletter, Mailing List

Data & Reports

MailChimp Email Report, Scholarship Import, Action Import, Data Import, Data Pull, Custom Report, Data Clean-up

Service & Support

Report Security Issue or Vulnerability, Password Reset, Hardware Support, Software Support, System Access, System Training, New Employee Onboarding, Other Support Request

[CMT Helpdesk](#) / [CMT Requests](#)

CMT Requests

Contact us about

Communications


What can we help you with?

 Custom Email Blast

Use the form to complete the request.

Required fields are marked with an asterisk*

Raise this request on behalf of*

 Rudy Rodriguez (rrodr027@ucr.edu)

Type

Automation ideas?

Select...

Title*

Name of email

Deaprtment*

Select...

Due Date*


At least two-weeks from submission day.

e.g. 2/27/2025



Ticket Layout

What can we help you with?


 Alumni Newsletter

To send alumni monthly newsletter for the month.

▼

Required fields are marked with an asterisk*

Raise this request on behalf of*

 Rudy Rodriguez (rrodr027@ucr.edu)

✕ ▼

Title*

Name of Email

Alumni Newsletter


Department*

VCUA - University Relations ▼

Due Date*

At least two weeks from submission

e.g. 2/27/2025



Purpose*

Normal text ▼

B

I


...

≡ ▼


A ▼

:≡

≡



<>




”

—

ABC

To send alumni monthly newsletter for the month.

 Criteria for Newsletters

Contact Restrictions

NO CONTACT AT ALL ✕

No Email ✕

No Alumni Association Email ✕

✕ ▼



[CMT Helpdesk](#) / [CMT Requests](#) / [Alumni Newsletter Audience](#)

Alumni Newsletter Audience

All alumni, all advancement

Anyone who signed up to the Alumni Newsletter landing page

Activity

Show:

All

Comments

History


Work log

Approvals

Newest first ⌵

RR

Add internal note / Reply to customer




Pro tip: press **M** to comment

RR

Rudy Rodriguez

February 18, 2025 at 1:32 PM






Hi [REDACTED], this email is set to go out on Monday the 24th at 8am. Please let me know if you have any questions.

thanks!

Knowledge Base








how to

Self-help resources

-  **How to submit a ticket**
Confluence page in CMT Requests
This varies depending on **how** complex the request is. Please fill out as much as you can, as this helps us better understand your request!
-  **CMT Knowledge Base**
Confluence page in CMT Requests
How can we help you? About This is the CMT's official online knowledge base.
-  **Blackbaud - Raiser's Edge**
Confluence page in CMT Requests
How can I add a missing fundraiser there?...solicitor is inactive Click Ok If the user's name is present in the Change fundraiser drop-down in Work Center but the user cannot access Work Center, please complete the steps in **How**

alumni

Self-help resources

-  **Alumni Newsletter Audience**
Confluence page in CMT Requests
All **alumni**, all advancement Anyone who signed up to the **Alumni** Newsletter landing page
-  **AAPU Alumni Newsletter Audience**
Confluence page in CMT Requests
Arts - Senryu Taiko h. Arts - STAGE: Chinese Performing Arts Club i. Arts - UC Raas Collegiate Indian Folk Dance Team j. Cult/National - Asian Indian Student Assoc. k.
-  **CNAS Newsletter Audience**
Confluence page in CMT Requests
UCR Senior Leadership Current CNAS faculty Current CNAS staff Current CNAS students (undergrads and grads) Degreed CNAS **alumni** Non-degreed CNAS **alumni** from the last 5 years Donors that...supported CNAS in the last 5 years Parents of current CNAS students Parents of CNAS **alumni** who graduated in the last 5 years Emails signed up for the mailing list Community College
-  **Weekly Highlander Email Blast Audience**
Confluence page in CMT Requests
Current Athletics Association Board Athletics **Alumni** Current parents of current athletes Donors to athletics from FY19-present UCR faculty or staff hires starting from 2019 UCR faculty or staff within a 10mi radius with kids UCR **Alumni** that live within the following zip codes: 92501, 92507, 92521, 92506, 92557
-  **Botanic Garden eNews Audience**
Confluence page in CMT Requests
Current Botanic Gardens staff Current UCR faculty, staff, and students (undergrad and graduate) Degreed and non-degreed CNAS **alumni** Parents of CNAS **alumni** who graduated in the last
-  **BCOE Newsletter Audience**
Confluence page in CMT Requests
Non-BCOE Constituents: Use attached spreadsheet BCOE Constituents: BCOE staff BCOE faculty BCOE **alumni** Current BCOE students UCR VIPs (Senior management group [Deans and above]) Anyone
-  **School of Education Newsletter Audience**
Confluence page in CMT Requests
SOE **alumni** Teacher credential recipients SOE donors from the last 5 years Current SOE undergraduate students Current SOE graduate (MA and MEd) students Teacher credential

Request forms

-  **Alumni Newsletter**
-  **AAPU Alumni Newsletter**



RIVERSIDE | Highlander Impact Network



History of UCR advocacy

- Began in 1980's
- Multiple advocacy committees across campus
 - CUC, Alumni Association Committee, Foundation Committee
- In 2024, combined to create the campus wide Highlander Impact Network



Who can be an advocate?

- All alumni
- Friends of the University
- Faculty/Staff
- Students
- Parents



How does advocacy work?

- Local, state and federal
 - Local – City Council, County Board of Supervisors, School Board
 - State – CA Legislature, includes the CA State Assembly and CA State Senate
 - Federal – Congress, includes Senate and House of Reps
- Various ways to advocate
 - Call or email legislators
 - Meet with legislators (Advocacy Day)
 - Submit public comment



What do we advocate for?

- Equitable share of funding for UC Riverside
 - Against budget cuts in difficult financial years
- Legislation that positively impacts our campus
- Locally share the economic impact UCR has on Riverside city/county
- Investment in UCR's commitment to the IE



Types of Advocacy

- Diversity, Equity and Inclusion
- Higher Education Budget
- Healthcare/Medicine
- Research





UCR Advocacy Day Recap

ADVOCACY BY THE NUMBERS

12

UCR Advocates

20

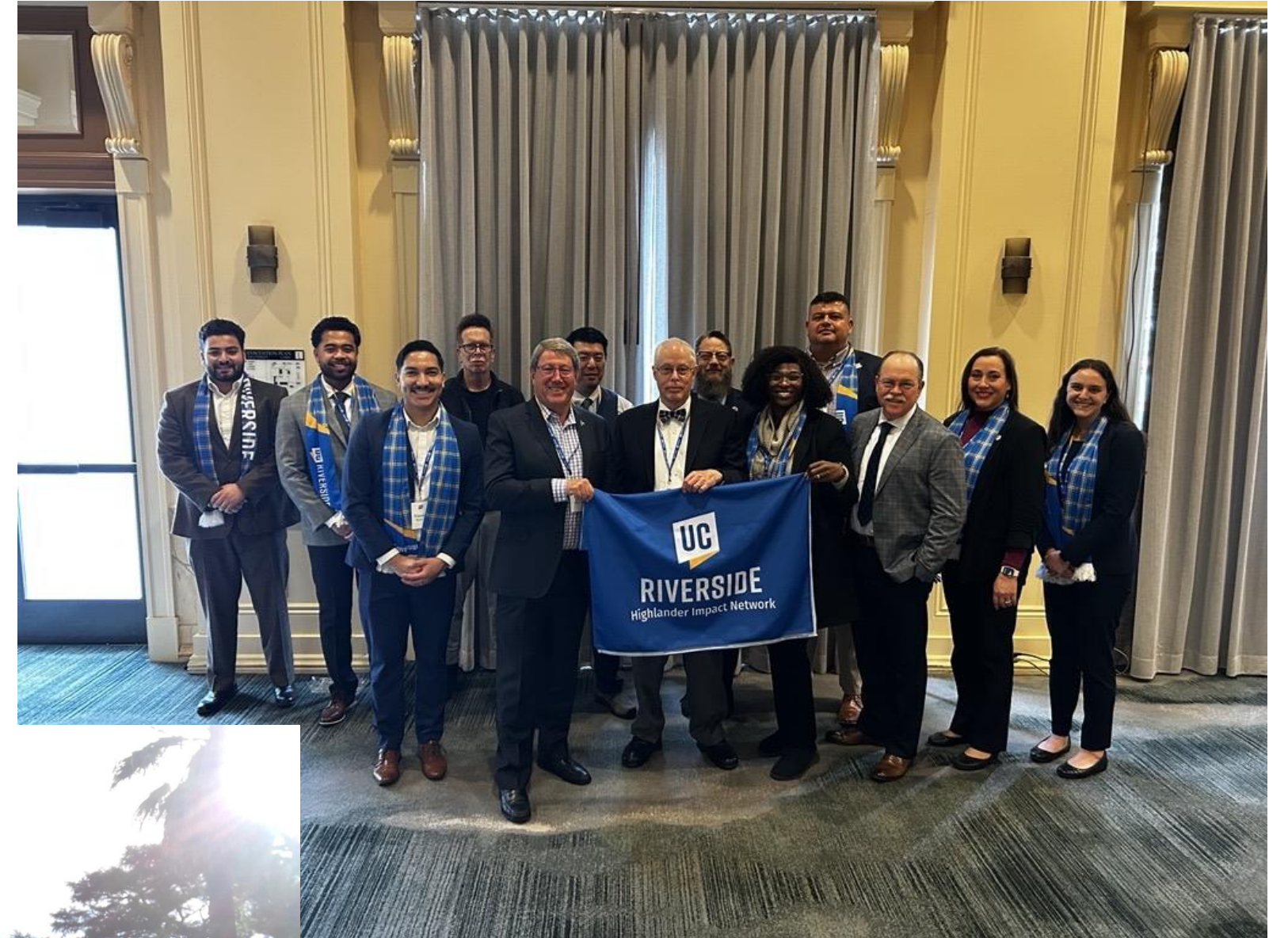
**Meetings with CA
Legislative Members**

125

**Evening Reception
Registrants**

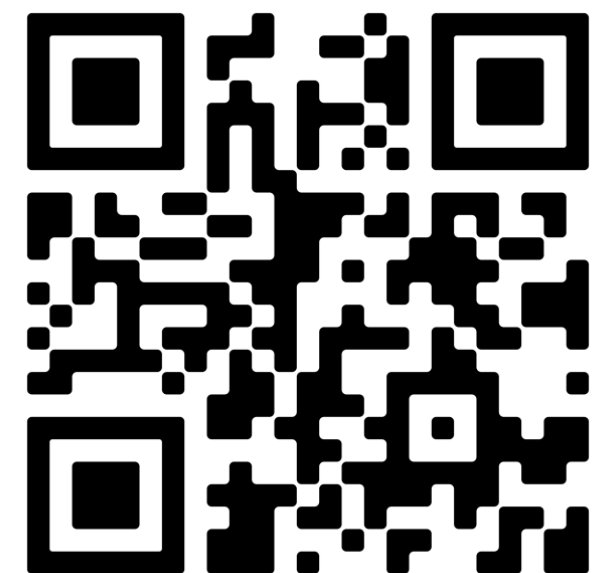
7.95%

**Budget cut we advocated
against**



How can you help?

- Refer alumni/donors to be advocates
 - Fill out the HIN Interest Form
- Inform Alumni Engagement if your prospects have connections with elected officials and their staff
- Stay up to date on budget/legislation impacting UCR
- Be an advocate yourself!



QUESTIONS OR COMMENTS?



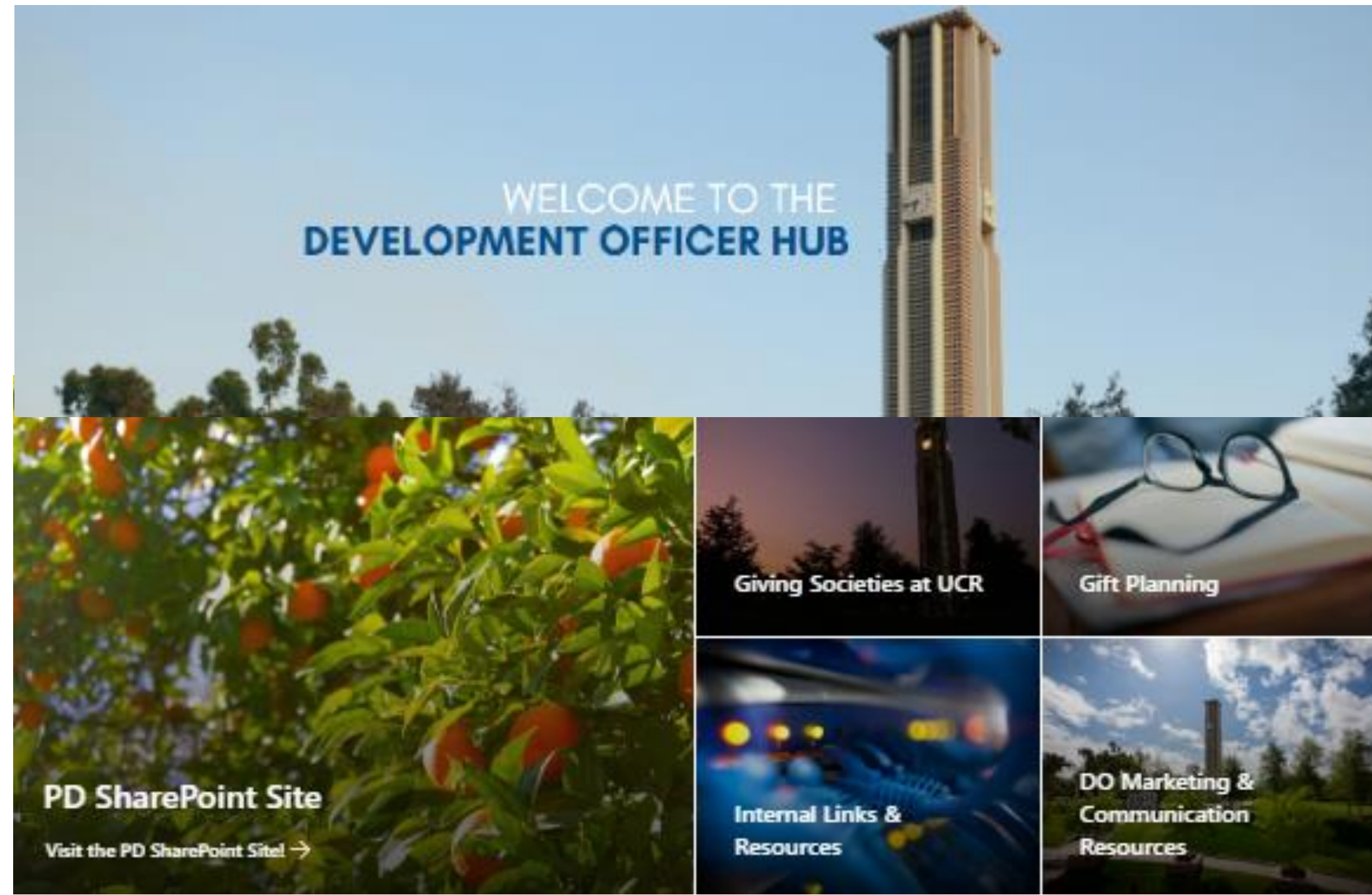
WELCOME TO THE **DEVELOPMENT OFFICER HUB**



- Research Tool Kit
- Free External Resources for Prospect Research

Internal Links & Resources

Development Officer Tools




Internal Links & Resources


Development Officer Tools

 DO Marketing & Communication Resources

 Branding - Gift Officer Tool Kit
University Relations Branding Tools

 Beyond Brilliant Impact

 Raiser's Edge NXT
Sign in with your UCR netID & UCR password.

 Outlook Online
Access Outlook email via the web.

 Development SharePoint Drives
Access UA Shared Files for Development.

 Research Tool Kit
Free online resources to do preliminary research.










Research Tool Kit

Free External Resources for Prospect Research

Development Officers should use the following free external resources for their basic searches, such as contact information, address information, or spousal/family information. For more complex research needs, please engage the PD team by [submitting a research request](#). Please note that research requests are usually processed within 10 business days.

As always, please continue to use cybersecurity best practices.

Contact Information

-  **Fast People Search**
Reverse phone lookup, name, or address searches
-  **Intelius**
People and property search, background checks, and reverse phone lookups
-  **PeekYou**
People search engine that indexes people and their links on the web
-  **Search People Free**
Contact information, address, and phone lookups
-  **True People Search**
Name, address, and phone lookups
-  **White Pages | ZabaSearch**
Name, address, and phone lookups
-  **Yellow Pages**
Telephone directory of businesses





Business Information

-  **CA Business Search**
Business Entities - Business Programs | California Secretary of State
-  **BrokerCheck**
Find a broker, investment or financial advisor
-  **Business Registry Business Name Search**
Search for a Business Name in the Business Registry Database
-  **Manta**
Small Business Search



Foundation Information

-  **Online Help - Common Grant Application**
Common Grant Application Glossary of Terms
-  **ProPublica Nonprofit Explorer**
To research nonprofit orgs and view 990s



Email Finder/Verification

-  **Email-Checker**
Email verification
-  **Hunter.io (Email Hunter)**
Email finder and verification
-  **MailScoop.io**
Email finder and verification
-  **MailTester**
Email verification







Professional Licenses

-  **DCA Search**
Verify a license issued by the Department of Consumer Affairs (DCA)
-  **DoctorFinder**
Provides basic professional information on virtually every licensed physician in the USA
-  **DocInfo**
Verify a doctor's license and professional background information
-  **State Bar of CA**
Official attorney licensing agency; search for verified attorneys via name or BAR number

Government Resources

-  **FEC.gov**
Federal Election Commission
-  **Internal Revenue Service**
Tax Exempt Organization Search



Real Estate

-  **Eppraisal**
Comparison of appraisal and Zillow value
-  **NETR Online**
Public Records, Search Records, Property Tax, Property Search, Assessor
-  **Riverside County Assessor**
Riverside County Clerk - Recorder - Public Access Online Services
-  **Tax Assessor Website**
Links to all of the states' tax assessor websites
-  **Trulia**
Real Estate Listings, Homes For Sale, Housing Data
-  **Zillow**
Real Estate, Apartments, Mortgages & Home Values

Salary/Compensation

-  **Transparent California**
Salary for public California employees
-  **Salary.com**
Salary Calculator, Salary Comparison, Compensation Data
-  **Self-Reported Entertainment Industry Salaries**
Entertainment Industry Self Reported Salary
-  **The Sacramento Bee - sacbee**
Salary for California state employees
-  **Washington State Employee Salaries**
Salaries for Washington state employees

Other

-  **Databases | UCR Library**
UCR's internal databases; may require login with NetID
-  **Factiva - California Digital Library**
Public/private business information and research tool

PROPUBLICA

Nonprofit Explorer

Nonprofits ▾Habitat for Humanity

Q

Results for “Habitat for Humanity”

Nonprofits (1,342)People (5)Filings (10k+)

Habitat For Humanity International Inc — Habitat For Humanity Intrnl Parent

Americus, GA • International, Foreign Affairs and National Security • International Relief

Revenue (2022-2023)
\$329,195,153

Habitat For Humanity International Inc — Habitat For Humanity Of The Charlot

Charlotte, NC • Housing, Shelter • Housing Development, Construction, Management

Revenue (2022-2023)
\$41,882,773

Attorney Profile

Gloria Rachel Allred #65033

License Status: Active

Address: Allred Maroko & Goldberg, 6300 Wilshire Blvd, Ste 1500, Los Angeles, CA 90048-5217
Phone: 323-653-6530 | Fax: Not Available
Email: Not Available | Website: Not Available

More about This Attorney ▾

License Status, Disciplinary and Administrative History

All changes of license status due to nondisciplinary administrative matters and disciplinary actions.

Date	License Status ⓘ	Discipline ⓘ	Administrative Action ⓘ
Present	Active		
12/18/1975	Admitted to the State Bar of California		

Mailscop
Find Anyone's Email In Seconds.

Enter your contact's information below to get started:

Gloria Allred

@


www.amglaw.com

FIND IT

You Have 7 Free Email Searches Left ([Learn More](#))

Awesome, we found it!

gallred@amglaw.com

 We are pretty confident this is the right email.

A few examples...

01 Finding & Verifying Emails

- Email Hunter, MailScoop.io, MailTester, Email Verification

02 Salary Searches

- Transparent California, Salary.com, Glassdoor

03 Finding Contact Information

- Fast People Search, White Pages, RocketReach

04 Quick Real Estate Search, Values & Tax Assessed Values

- Riverside County Assessor, Trulia, Redfin, Zillow

05 Additional Tools

- State Bar of CA, DoctorFinder, FEC.Com, SEC.Gov, Internet Archive, ProPublica



**For more
information**

Contact the Prospect
Development team at:

CRD@UCR.EDU



5-MINUTE BREAK

UA TECHNOLOGY TRANSFORMATION & SALESFORCE UPDATE



DOMAIN COLLAPSE & GOOGLE TRANSITION

Mai Vang

Domain Collapse

Refers to the merging of multiple, separate systems or networks into a single, unified infrastructure.



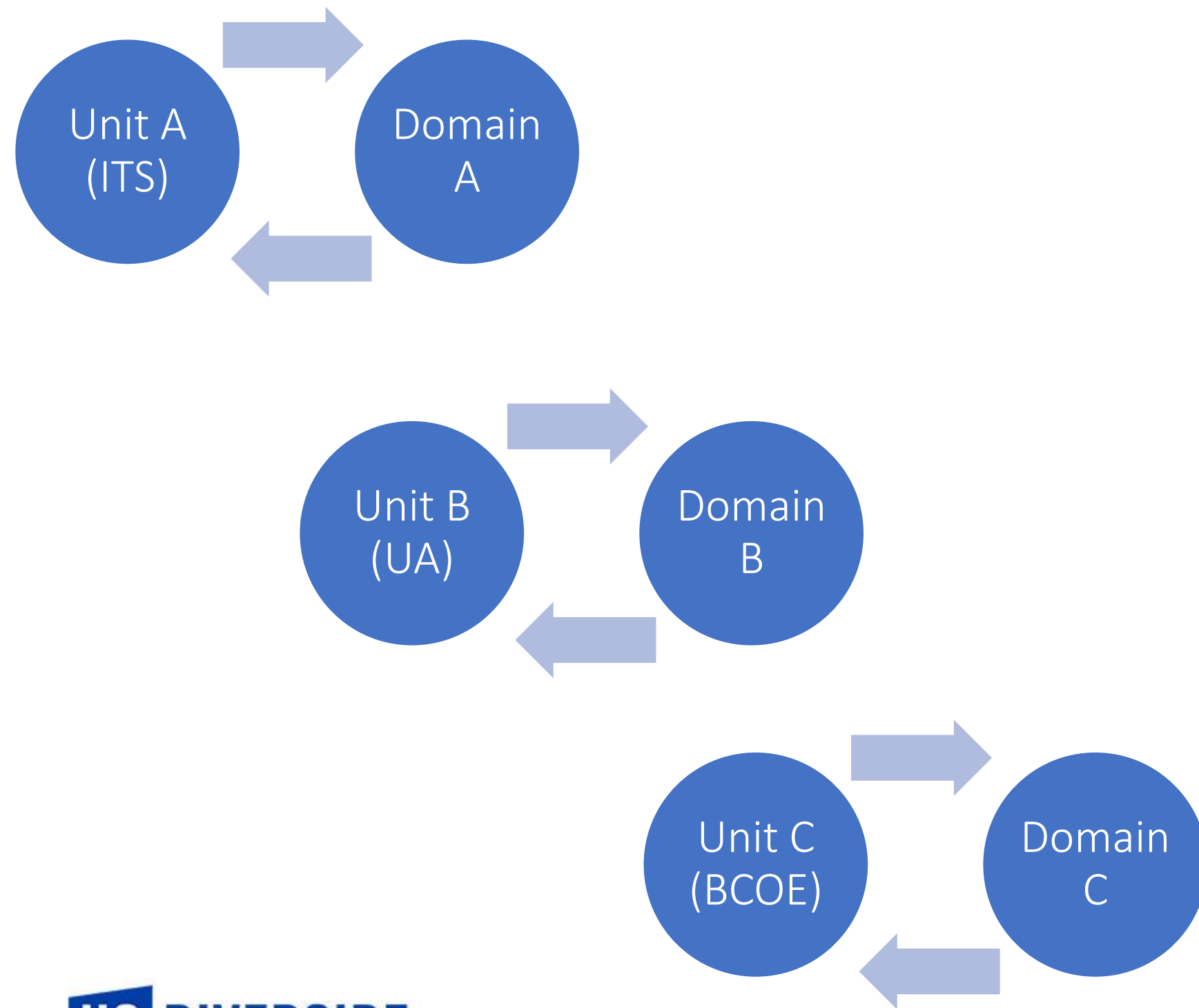
Domain Infrastructure

Each domain infrastructure includes management of network access and user identities within an organization.

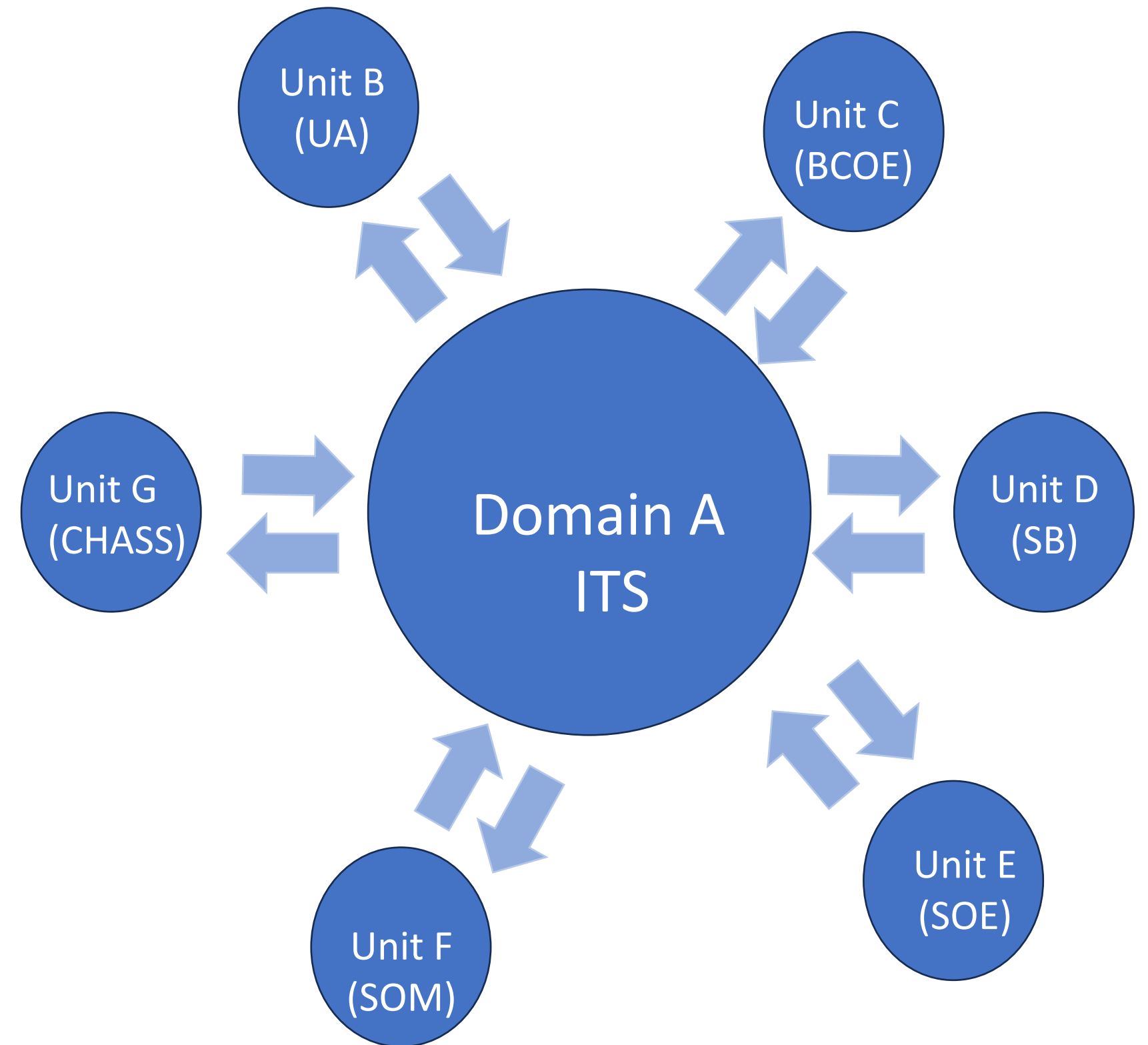
It is a centralized hub to control who can access resources and manage security policies across connected devices, like laptops, printers, endpoints, virtualization, servers, etc.



BEFORE



AFTER





Why is UA Collapsing our Domain?

The domain collapse will be occurring this year in collaboration with central ITS as part of their security investment roadmap to enhance security across the university at the request of the Chancellor and Provost due to the UC President's mandates.



R'Mail

Google Mail & Calendaring Transition

At the request of the Provost, there is a push to get all students, faculty, and staff onto Google Mail and Calendaring by Fall 2025.

This transition in services aligns with ITS's strategic goals to consolidate resources to create a consistent experience across campus and enhance collaboration.

UA is scheduled to
make the
transition to R'Mail
in June 2025.



R'Mail Training & Resources

ITS is offering the following resources for the transition:

- Website (scan the QR code)--->
- Webinars
- On-Demand Recorded Training
- Office Hours
- R'Mail Migration Checklist



EEG SLACK IMPLEMENTATION

Alexis Szewczuga

Preview

01 Slack for Engagement

02 Slack Structure

03 UA Slack Channels

**04 Etiquette &
Productivity Tips**

**05 How to Join the UA
Slack Workspace**

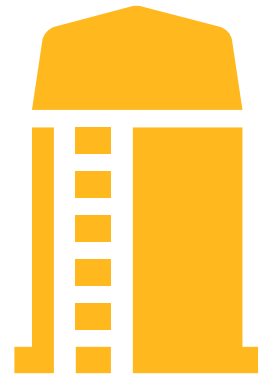


What is Engagement?

“Employees feel engaged when they feel a sense of social cohesion... information is shared easily and readily within the organization, and they are able to communicate with one another with ease.”

- Society for Human Resource Management, 2018

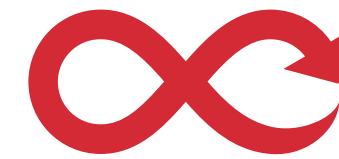
STAFF FEEDBACK



Silos



Connection



Transparency

CHALLENGES



Physical Office Locations



**Remote & Hybrid
Schedules**



Technology

SOLUTION - SLACK

01 Create a sense of interpersonal belonging
Slack creates the opportunity to have casual chit-chat with colleagues, regardless of physical location

02 Facilitate Fast & Easy Communication
Slack can be faster and easier to respond to than e-mail

03 Create Transparency and Open Communication
Every member of UA can use the University Advancement Workspace

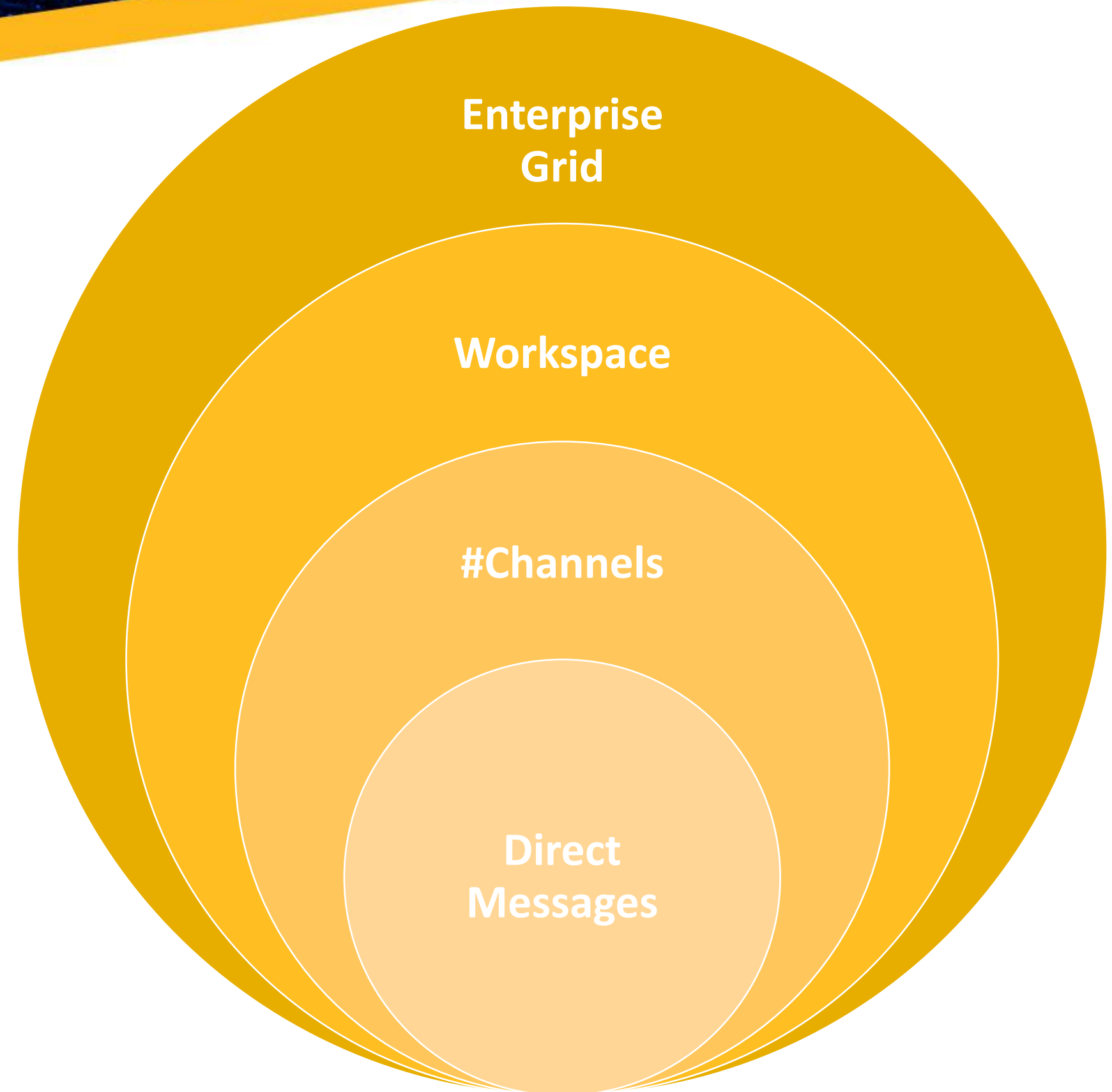
04 Existing Slack Enterprise Grid
Makes use of a technology we already have access to

05 Ability to Organize Conversations in Channels
Keeps the conversation organized

06 Additional Productivity Features
Slack has additional features and addons and can be used as more than instant messaging platform



Slack Structure



UA Slack Channels

01 **#vcua-ualt-communication**

This is the default channel. Used exclusively by UALT to share important updates and announcements and read-only for other users.

02 **#ua-chit-chat**

Can be used for general conversation and chit-chat. Discuss sports, the weather, share memes, whatever you'd like! Keep connected with your colleagues.

03 **#ua-collaboration**

Used for work-related matters such as team events, requesting training or assistance, and brainstorming ideas for collaboration.

04 **#ua-kudos**

Used for celebrating your colleagues! Consider giving shoutouts for a job well done, share peer-to-peer nominations, etc.

05 **Additional Channels**

Additional channels can be created as needed or upon request, including private channels.

FUNCTIONALITY TIPS

01 Mentions

Use @username to mention a specific user; User groups can also be created e.g., @ProspectDevelopment or @UALT

02 Reactions & Emojis

Use emojis to acknowledge receipt or react to a message quickly

03 Sharing & File Integrations

Slack integrates with Outlook, OneDrive, and other software

04 Notification Management

Customize notifications to work for you.

ETIQUETTE TIPS

01 Be Professional & Courteous

02 Use Appropriate Channels

03 Be Mindful of Confidential Information

04 Move to Threads or DMs When Appropriate

How to Join the UA Slack Workspace



SALESFORCE CRM NAMING COMPETITION

Vanessa Torrez



Logistics



- UA staff submitted 60 CRM name recommendations.
THANK YOU!
- UALT narrowed the list to 6 finalists
- Vote March 6 until March 21
 - Vote now with QR code, or
 - Be on the lookout for an email later today with a link to submit a vote for your favorite name!
- The staff member who submitted the winning name will receive a \$50 gift card

FINALISTS

01 Lux

Inspired by UCR's motto, "Fiat lux" (Let there be light), this name symbolizes a guiding beacon within UA teams and in our shared commitment to support the UCR community. It embodies clarity, innovation, vision, and optimism — essential qualities that drive our projects and propel us toward achieving our goals. Plus, Lux is simple to pronounce when referencing the resource. No nicknames are needed.

02 Kindred

Kindred is a word that evokes connection and value alignment, representing what CRM should do. But Kindred also evokes what a new system should be--something approachable that we use in order to create values-based connections. The word is friendly but polished for business use.

03 Highlander 360

Database will provide a comprehensive view of our prospects and donors.

04 TartanTech CRM

Combining the iconic Scottish tartan with technology, this name suggests a CRM system that's both traditional and advanced.

05 Nexus

A hub where connections and relationships come together.

06 Polaris

Polaris is the technical name of the north star, the thing that guides us and gives us a direction. This new tool is something important, revolutionary, and can absolutely help chart us into untested and exciting waters that await the university.

SALESFORCE: WHERE ARE WE & WHAT'S NEXT?

Mai Vang

Salesforce/ascend Sprints

✓ **01 Bio/Demo - Constituent**
Constituent contact and bio information (including names, phones, salutations, email, social media, addresses, IDs, etc.

✓ **04 Bio/Demo - Households and Bio Demo Other**
Household record, members, names, emails, phones, addresses, involvement, service indicators,, cases, and Knowtify.

✓ **02 Bio/Demo - Constituent Related**
Involvement, service indicators, degree information, relationships, funding interests, and deduping rules.

✓ **05 Gift Processing - Referential**
Designations, appeals, hard and soft credit, and sessions.

✓ **03 Bio/Demo - Organizations & Related Records**
Organization contacts and bio information (including names, phones, salutations, email, social media, addresses, IDs, etc.

✓ **06 Gift Processing – Outright and Matching Gifts**
Outright gifts, designation details, tributes, gift premiums, matching gift claims and disbursement.

Salesforce/ascend Sprints

✓ **07 Gift Processing – Pledges, Recurring Gifts & Payments**
Pledges, installments, planned gifts, recurring gift payments, stock and stock payment, corrections and adjustments, mass actions, and expedited gift processing.

08 Gift Processing – RTV2 and Interims
Matching rules, de-dupe processing, batch processing, and gift processing transactions.

09 Prospect Management
Strategies, contact reports, files, proposals, planned gift proposals, tasks, and action center.

10 Prospect Research
Custom "prospect" record and related objects, assignments, stage of readiness, work plans, research, briefings, funding interests, and wealth ratings.

11 Stewardship, Memberships & Giving Societies
Giving societies, membership levels and benefits, endowment financials, stewardship activities, naming opportunities, and acknowledgements.

12 Backlog
Re-evaluate any requests that didn't get completed during the sprint and worked on in collaboration with the CMT team.

Salesforce Native Tools Selection

Event Management: Linvio



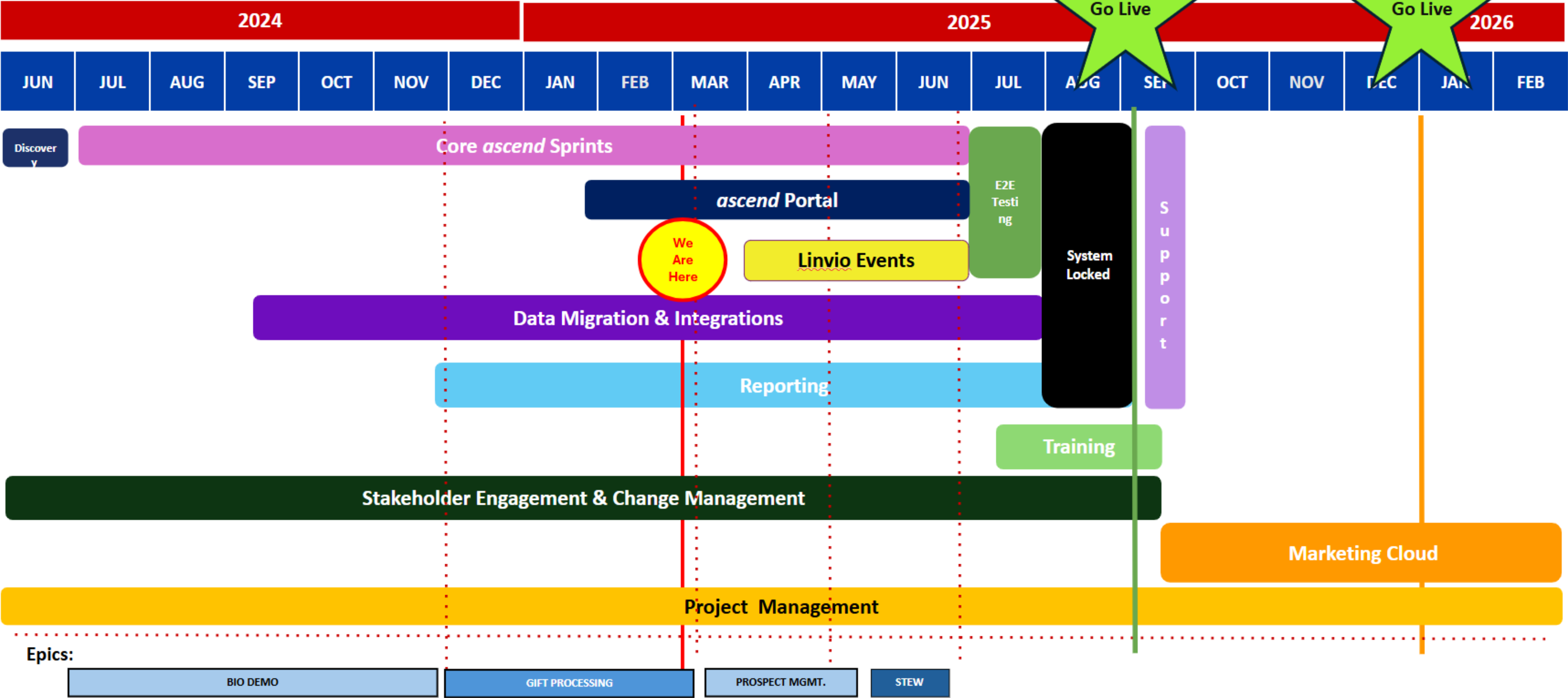
Document Generation: Formstack



Address Verification: SmartyStreets



Project Timeline (030325)





What's Next

- Sprints Left: (March-June 2025)
 - Gift Processing
 - Prospect Management
 - Prospect Research
 - Stewardship, Membership, & Giving Societies
- Events Platform – Linvio (March-June 2025)
- Portal – ascend Connect (February-May 2025)
- Training – July 2025
- Go-Dark Period/System Locked (August 2025)
- Go-Live for Salesforce/Ascend CRM- 9/8/2025
- Marketing Cloud (Oct. 2025-February 2026)

SALESFORCE SNEAK PEAK: BIO DEMO

Patrick Nance



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



+ Follow

Edit

Delete

Manage Household



Donor ID

00007208

Phone

541-791-1158

PRM

Account Name

[Robert Baker Household](#)

Email

robertathome@gmail.com

LinkedIn URL

<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Trustee Involvements



TRUSTEE INVOLVEMENT ⬆️ ROLE ⬆️ START DATE ⬆️ END DATE ⬆️

UCRF Board of Trustees Member Nov 1, 2024

Alerts

2 of 2 items

Comment	Start Date	End Date
Meetings are set-up through Bob's assistant. Alice Smith.	Nov 5, 2024	
Please contact Chancellor's Office before making contact with donor.	Oct 7, 2024	

Overview

Constituent Details

Prospect Management

Chatter

Name	Mr. Robert Dean Baker	Is Name Overridden	<input type="checkbox"/>
Recognition Name	Mr. Robert Dean Baker	Is Recognition Name Overridden	<input type="checkbox"/>
Pronouns	He/Him	Gender	Man
Professional Designation		Race/Ethnicity	White/Caucasian
Marital Status	Married	Religious Preference	Christian, Non-Catholic
Description			
Is Anonymous	<input type="checkbox"/>		

Additional Information

Constituent Type	Trustee - Current	Preferred Class Year	1987
Is Confidential	<input type="checkbox"/>	Preferred Class Year Type	Conferred Degree Year

Birth / Death Information

Birth Month	February	Deceased Month	
Birth Day	19	Deceased Day	
Birth Year	1965	Deceased Year	



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



+ Follow

Edit

Delete

Manage Household



Donor ID
00007208

Phone
541-791-1158

PRM

Account Name
[Robert Baker Household](#)

Email
robertathome@gmail.com

LinkedIn URL
<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Smith.

Please contact Chancellor's Office before making contact with donor.

Oct 7, 2024

Overview

Constituent Details

Prospect Management

Chatter

Giving Details

Names

Salutations

Addresses

Phones

Emails

Social Media

Affiliations

More

Names

New



PREFIX	FIRST NAME	LAST NAME	MIDDLE NAME	TYPE	SUFFIX	PROFESSIONAL DESIGNATION	DATA SOURCE	CONSTITUENT NAME ID	ACTIONS
Mr.	Robert	Baker	Dean	Full Name				N-0000616	

<<

<

1

>

>>

Showing 1 to 1 of 1 record(s).



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



[+ Follow](#)
[Edit](#)
[Delete](#)
[Manage Household](#)

Donor ID
00007208
 Phone
541-791-1158
 PRM
 Account Name
[Robert Baker Household](#)
 Email
robertathome@gmail.com
 LinkedIn URL
<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Trustee Involvements



TRUSTEE INVOLVEMENT
 [↑↓](#)
 ROLE
 [↑↓](#)
 START DATE
 [↑↓](#)
 END DATE
 [↑↓](#)

Smith.

Please contact Chancellor's Office before making contact with donor. Oct 7, 2024

[Overview](#)
[Constituent Details](#)
[Prospect Management](#)
[Chatter](#)

[Giving Details](#)
[Names](#)
[Salutations](#)
[Addresses](#)
[Phones](#)
[Emails](#)
[Social Media](#)
[Affiliations](#)
[More](#)

Salutations

New



INSIDE SALUTATION ↑↓	ADDRESSEE LINE 1 ↑↓	ADDRESSEE LINE 2 ↑↓	ADDRESSEE LINE 3 ↑↓	SALUTATION TYPE ↑↓	SALUTATION AUTHOR ↑↓	EDITABLE ↑↓	SALUTATION NAME ↑↓	ACTIONS
Robert	Robert D. Baker			Formal	UCR Standard	<input type="checkbox"/>	SAL-0003313	Edit Delete
Robert				Informal	UCR Standard	<input type="checkbox"/>	SAL-0003314	Edit Delete
Robert and Lisa	Robert D. Baker and Lisa E. Baker			Formal	UCR Standard	<input type="checkbox"/>	SAL-0003320	Edit Delete
Robert and Lisa				Informal	UCR Standard	<input type="checkbox"/>	SAL-0003322	Edit Delete
Mr. Baker and Mrs. Baker	Mr. Robert D. Baker and Mrs. Lisa E. Baker			School of Medicine	SOM	<input type="checkbox"/>	SAL-0003324	Edit Delete

[<<](#)
[<](#)
[1](#)
[>](#)
[>>](#)

Showing 1 to 5 of 5 record(s).



[View Critical Information](#)

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



[+ Follow](#)
[Edit](#)
[Delete](#)
[Manage Household](#)

Donor ID
00007208
 Account Name
[Lisa & Robert Baker Household](#)
 Phone
541-791-1158
 Email
robertathome@gmail.com
 PRM
 LinkedIn URL
<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Trustee Involvements



Alerts

2 of 2 items

Comment	Start Date	End Date
Meetings are set-up through Bob's assistant. Alice Smith.	Nov 5, 2024	
Please contact Chancellor's Office before making contact with donor.	Oct 7, 2024	

[Overview](#)
[Constituent Details](#)
[Prospect Management](#)
[Chatter](#)

[Giving Details](#)
[Names](#)
[Salutations](#)
[Addresses](#)
[Phones](#)
[Emails](#)
[Social Media](#)
[Affiliations](#)
[More](#)

Addresses

[New](#)



ADDRESS	STATUS	IS PREFERRED	FULL ADDRESS	TYPE	START DATE	END DATE	HOUSEHOLD	CREATED DATE	ADDRESS RELATION NAME	ACTIONS
ADDR-0000218	Current	<input type="checkbox"/>	19000 NE Sandy Blvd Portland, O...	Business			Lisa & Robert Baker Household	Mar 4, 2025	AR-0000246	
ADDR-0000217	Former	<input type="checkbox"/>	1546 SE 31st Ave Portland, O...	Home		Mar 1, 2016	Lisa & Robert Baker Household	Mar 4, 2025	AR-0000245	
ADDR-0000216	Current	<input checked="" type="checkbox"/>	4402 Southeast Yamhill Stre...	Home	Mar 2, 2016		Lisa & Robert Baker Household	Mar 4, 2025	AR-0000244	

[<<](#)
[<](#)
[1](#)
[>](#)
[>>](#)

Showing 1 to 3 of 3 record(s).



Address
ADDR-0000216

New Lead

Edit

New Note



> Verify Address

Details **Related**



Address Relations (2)

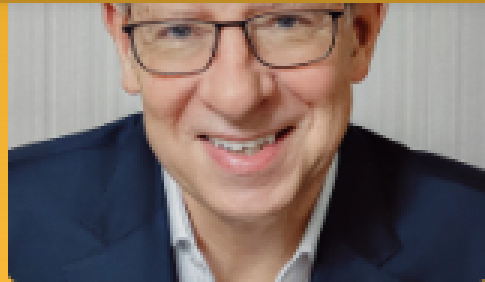
New

Address Relation Name	Constituent	Account	Status
AR-0000244	Robert Dean Baker	Lisa & Robert Baker Household	Current ▼
AR-0000247	Lisa Elzora Baker	Lisa & Robert Baker Household	Current ▼
View All			



Address History (1)

Date	Field	User	Original Value	New Value
3/4/2025, 1:40 PM	Created.	Patrick Nance		
View All				



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



[+ Follow](#)
[Edit](#)
[Delete](#)
[Manage Household](#)

Donor ID 00007208	Account Name Robert Baker Household
Phone 541-791-1158	Email robertathome@gmail.com
PRM	LinkedIn URL https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/

Trustee Involvements



Smith.

Please contact Chancellor's Office before making contact with donor. Oct 7, 2024

[Overview](#)
[Constituent Details](#)
[Prospect Management](#)
[Chatter](#)

[Giving Details](#)
[Names](#)
[Salutations](#)
[Addresses](#)
[Phones](#)
[Emails](#)
[Social Media](#)
[Affiliations](#)
[More](#)

Phones

New



PHONE NUMBER	STATUS	IS PREFERRED	TYPE	SUSPECT PHONE	BAD PHONE	DATA SOURCE	LAST MODIFIED DATE	ACTIONS
541-791-1158	Current	<input checked="" type="checkbox"/>	Mobile	<input type="checkbox"/>	<input type="checkbox"/>	Other	Mar 5, 2025	
541-791-4879	Current	<input type="checkbox"/>	Home	<input type="checkbox"/>	<input type="checkbox"/>	Other	Mar 5, 2025	
541-456-4568	Current	<input type="checkbox"/>	Business	<input type="checkbox"/>	<input type="checkbox"/>	Other	Mar 5, 2025	
541-301-6874	Current	<input type="checkbox"/>	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	Other	Mar 5, 2025	



Lisa & Robert Baker Household



+ Follow

Edit

Delete

Manage Household



Primary Constituent

[Robert Dean Baker](#)

Lifetime Fundraising

Lifetime Cash

Campaign Total Cash

Total Campaign Fundraising

Amount of Most Recent Gift



Trustee Involvements



Overview

Household Details

Prospect Management

Chatter

Giving Details

Household Members

Household Names

Addresses

Phones

Emails

Social Media

More



Phones



CONSTITUENT	PHONE NUMBER	STATUS	IS PREFERRED	TYPE	SUSPECT PHONE	BAD PHONE	LAST MODIFIED DATE	ACTIONS
Lisa Elzora Baker	971-258-7123	Current	<input checked="" type="checkbox"/>	Mobile	<input type="checkbox"/>	<input type="checkbox"/>	Mar 5, 2025	
Robert Dean Baker	541-791-1158	Current	<input checked="" type="checkbox"/>	Mobile	<input type="checkbox"/>	<input type="checkbox"/>	Mar 5, 2025	
Robert Dean Baker	541-791-4879	Current	<input type="checkbox"/>	Home	<input type="checkbox"/>	<input type="checkbox"/>	Mar 5, 2025	
Robert Dean Baker	541-456-4568	Current	<input type="checkbox"/>	Business	<input type="checkbox"/>	<input type="checkbox"/>	Mar 5, 2025	
Robert Dean Baker	541-301-6874	Current	<input type="checkbox"/>	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	Mar 5, 2025	

<<

<

1

>

>>

Showing 1 to 5 of 5 record(s).



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



[+ Follow](#)
[Edit](#)
[Delete](#)
[Manage Household](#)

Donor ID
00007208
 Account Name
[Robert Baker Household](#)
 Phone
541-791-1158
 Email
robertathome@gmail.com
 PRM
 LinkedIn URL
<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Smith.

Please contact Chancellor's Office before making contact with donor. Oct 7, 2024

[Overview](#)
[Constituent Details](#)
[Prospect Management](#)
[Chatter](#)

[Giving Details](#)
[Names](#)
[Salutations](#)
[Addresses](#)
[Phones](#)
[Emails](#)
[Social Media](#)
[Affiliations](#)
[More](#)

Social Media

New



SOCIAL MEDIA NAME	NOTES	PLATFORM	SOCIAL HANDLE	URL	VIEW	ACTIONS
SM-0000052		Instagram	@rbaker068			
SM-0000051		LinkedIn		https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/	View	



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



+ Follow

Edit

Delete

Manage Household



Donor ID
00007208

Phone
541-791-1158

PRM

Account Name

[Robert Baker Household](#)

Email

robertathome@gmail.com

LinkedIn URL

<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Smith.

Please contact Chancellor's Office before making contact with donor. Oct 7, 2024

Overview **Constituent Details** Prospect Management Chatter

[Giving Details](#)
[Names](#)
[Salutations](#)
[Addresses](#)
[Phones](#)
[Emails](#)
[Social Media](#)
[Affiliations](#)
[More](#)



Affiliations

New



ORGANIZATION	ORGANIZATION ROLE	STATUS	IS PRIMARY CONTACT	IS DONOR CONTROL	START DATE	END DATE	AFFILIATION NAME	ACTIONS
International Paperclip Inc.	Board	Current	<input type="checkbox"/>	<input type="checkbox"/>	Oct 1, 2024		AF-0000075	
Boeing	Employer	Current	<input type="checkbox"/>	<input type="checkbox"/>	May 1, 1982		AF-0000074	

<<


<

1

>



>>

Showing 1 to 2 of 2 record(s).

 Affiliation
AF-0000075

New LeadEditNew Note



RelatedDetails

Affiliation Name	AF-0000075		Status	Current	
Organization	International Paperclip Inc.		Organization Role	Board	
Constituent	Robert Dean Baker		Constituent Role	Board Member	
Is Primary Contact	<input type="checkbox"/>		Start Date	10/1/2024	
Is Donor Control 	<input type="checkbox"/>		End Date		
Is Primary Affiliation 	<input type="checkbox"/>		Data Source		

Job Information

Job Title	Board Member		Home Department	
-----------	--------------	--	-----------------	--

System Information

Created By	 Patrick Nance , 3/4/2025, 2:48 PM	Last Modified By	 Patrick Nance , 3/4/2025, 2:48 PM
Legacy Source ID			



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



+ Follow Edit Delete Manage Household

Donor ID: 00007208
Account Name: Robert Baker Household
Phone: 541-791-1158
Email: robertathome@gmail.com
PRM
LinkedIn URL: https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/

Trustee Involvements



TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
UCRF Board of Trustees	Member	Nov 1, 2024	

Smith.

Please contact Chancellor's Office before making contact with donor. Oct 7, 2024

Overview Constituent Details Prospect Management Chatter

Giving Details Names Salutations Addresses Phones Emails Relationships More



Relationships

New



RELATED CONSTITUENT	RELATED CONSTITUENT ROLE	RELATED CONSTITUENT DONOR ID	RECORD ID	ACTIONS
Lisa Elzora Baker	Spouse	00940677	REL-0000335	
Tom Baker	Sibling	00007110	REL-0000332	

<< < 1 > >>

Showing 1 to 2 of 2 record(s).

Relationship Map (Constituent Relationships)

Displaying 4 of 600 nodes; displaying 2 of 3 levels.



Sibling
Spouse

Tom Baker



View Critical Information

CONSTITUENT INDICATORS



Mr. Robert Dean Baker



+ Follow

Edit

Delete

Manage Household



Donor ID

00007208

Phone

541-791-1158

PRM

Account Name

[Lisa & Robert Baker Household](#)

Email

robertathome@gmail.com

LinkedIn URL

<https://www.linkedin.com/in/robert-baker-potentia-talent-consulting/>

Alerts

2 of 2 items

Comment	Start Date	End Date
Meetings are set-up through Bob's assistant. Alice Smith.	Nov 5, 2024	
Please contact Chancellor's Office before making contact with donor.	Oct 7, 2024	

Overview **Constituent Details** Prospect Management Chatter

[Giving Details](#)
[Names](#)
[Salutations](#)
[Addresses](#)
[Phones](#)
[Emails](#)
[Degree Information](#)
[More](#)



Degree Information

New



DEGREE INSTITUTION	CONFERRED DEGREE YEAR	IS PREFERRED	DEGREE	MAJOR	SECOND MAJOR	MINOR	STUDENT STATUS	NAME	ACTIONS
Oregon State University	1989	<input type="checkbox"/>	Master of Science	Mathematics				DEG-0000038	
University of California, Riverside	1987	<input type="checkbox"/>	B.S.	Computer Engineering			Graduated	DEG-0000037	

<<

<

1

>

>>

Showing 1 to 2 of 2 record(s).



🏠

Lisa & Robert Baker Household

👤

+ Follow

Edit

Delete

Manage Household

▼

Primary Constituent

Lifetime Cash

[Lisa Elzora Baker](#)

Lifetime Fundraising

Campaign Total Cash

Total Campaign Fundraising

Amount of Most Recent Gift

🔗

Trustee Involvements

🔄

CONSTITUENT	TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
Robert Dean Baker	UCRF Board of Trustees	Member	Nov 1, 2024	

<<

<

1

>

>>

Showing 1 to 1 of 1 record(s).

Giving Details

Household Members

Household Names

Addresses

Phones

Involvements

More

🔗 Involvements

🔄

CONSTITUENT	INVOLVEMENT CODE DESCRIPTION	INVOLVEMENT TYPE	ROLE	START DATE	END DATE	AWARD / HONOR REC'D DATE	INVOLVEMENT CODE	INVOLVEMENT NAME	ACTIONS
Lisa Elzora Baker	UCR Women's Volleyball	Sports Team	UCR Sports Team...	Sep 15, 1984	Apr 5, 1989		UCR Women's Volleyball	INV-0000093	<div>✎🗑️</div>
Lisa Elzora Baker	Alpha Pi Sigma	Greek Life	Member	Sep 30, 1984			Alpha Pi Sigma	INV-0000092	<div>✎🗑️</div>
Robert Dean Baker	Study Abroad: UK - Univ. of Nottingham	Study Abroad	Participant	Sep 1, 1986	Jan 1, 1987		Study Abroad: UK - Univ. of Nottingham	INV-0000091	<div>✎🗑️</div>
Robert Dean Baker	Tennis - Men's	Sports Team	UCR Sports Team...	Sep 1, 1983	Jun 10, 1987		Tennis - Men's	INV-0000090	<div>✎🗑️</div>
Robert Dean Baker	Associated Students of UCR (ASUCR)	Student Activity (Student Gov)	Treasurer	Sep 7, 1984	Aug 20, 1985		Associated Students of UCR (ASUCR)	INV-0000089	<div>✎🗑️</div>
Robert Dean Baker	UCR Magazine April 1992	Media Feature	Featured in Media	Apr 15, 1992	Apr 15, 1992		UCR Magazine, April 1992	INV-0000088	<div>✎🗑️</div>
Robert Dean Baker	Portland Alumni Network	Alumni Network	Dues-Paying Member	Jul 1, 2015			Portland Alumni Network	INV-0000087	<div>✎🗑️</div>
Robert Dean Baker	Alpha Epsilon Omega Fraternity	Greek Life	Member	Oct 11, 1983			Alpha Epsilon Omega	INV-0000086	<div>✎🗑️</div>
Robert Dean Baker	UCRF Board of Trustees	Committee	Member	Nov 1, 2024			UCRF Board of Trustees	INV-0000085	<div>✎🗑️</div>

<<

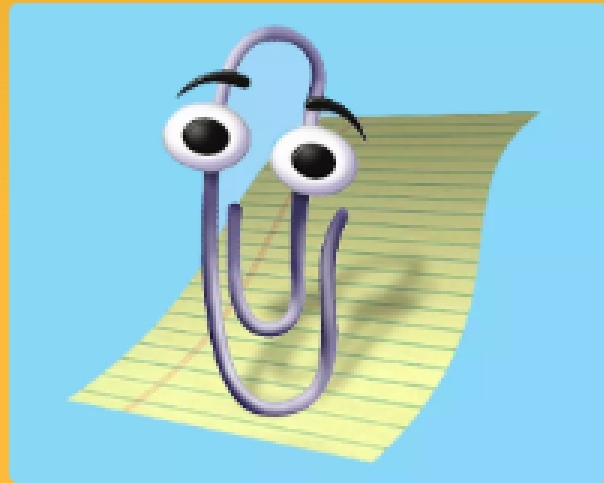
<

1

>

>>

Showing 1 to 9 of 9 record(s).



View Critical Information

UCR - Global Solicitations Opt-Out



International Paperclip Inc.



+ Follow

Edit

Delete



Donor ID
00940365

Phone
555-123-9977

PRM
[Brandon Westenberger](#)

Parent Account

Email
worldsbestpaperclips@clipit.com.test

Website
<https://paperclips.com/>

Alerts

1 of 1 item

Comment



Start Date

End Date

Do not record gifts on this record. Record actions and gifts on 123456.

Oct 2, 2024

Overview

Organization Details

Prospect Management

Chatter

Account Name	International Paperclip Inc.		Annual Revenue	
Parent Account			# Affiliated Constituent Employees	7
Industry	Manufacturing		Employees	125,000
Type	Corporation		Ticker Symbol	
Ownership	Private		SIC Code	
Website	https://paperclips.com/		SIC Description	
Receipt Type	One Receipt Per Gift		Rating	
Foreign Entity Controlled	<input checked="" type="checkbox"/>		Gives Anonymously	<input type="checkbox"/>
Restricted Party Screening Alert	<input type="checkbox"/>			
Description				

Additional Information

Donor ID	00940365	Stage of Readiness	
PRM	Brandon Westenberger	Wealth Rating	

Contact Information

SALESFORCE CHANGE CHAMPION SPOTLIGHT

Vanessa Torrez

Meet the Network



Vanessa Torrez

Asst. Dir. Talent
Management



Brock Cavett

Director, Programming &
Career Development



Alexis Szewczuga

Senior Data & Prospect
Research Analyst



Jeremy McWells

Associate Director of
Development, CNAS



Crystal Sankey

Senior Director, Annual
Giving



**Brandon
Westenberger**

Database Administrator



**Margene Mastin-
Schepps**

Executive Director,
Brand & Creative



DuBron Rabb

Assistant Dean of
Development, BCOE

What is the Change Champion Network?

A **change champion network** acts as a catalyst for change, building support and ensuring that the change is well-understood, and sustained across University Advancement.

Change Champions...

- ✓ Contribute to the overall success and long-term adoption of the implementation project
- ✓ Facilitate two-way communication between the project team and the rest of University Advancement team members
- ✓ Ensure that key messages are delivered, and that valuable feedback reaches the project team
- ✓ Relay updates, answer questions, and clarify information for their peers
- ✓ Enhance training effectiveness by providing local support and guidance, ensuring that UA Team members have access to resources and knowledge to adopt new tools or processes effectively

What's next?

Change Champions will be...

- Support Raiser's Edge to Salesforce crosswalk terminology glossary that will aid in training and change readiness for the transition
- Assist in creating end-to-end scenarios for scenario planning and end-to-end UAT
- Support training efforts and adoption
- Provide regular feedback on the following:
 - Team sentiment, feedback regarding project changes
 - Potential risks, concerns, roadblocks regarding project changes
 - Communications and engagement needs and what is working well





The **UA4U site** is designed to help you stay informed and prepared as we move forward with the Technology Transformation initiative.

We'll continue to make updates **monthly**, including as needed ad hoc updates.

UNIVERSITY OF CALIFORNIA, RIVERSIDE

UC RIVERSIDE UA4U

Bold Hearts. Brilliant Minds.

HOME

NEW HIRES & PROMOTIONS

ENGAGEMENT GROUP

QUARTERLY UPDATES

TECHNOLOGY TRANSFORMATION

RESOURCES

Technology Transformation

TECHNOLOGY TRANSFORMATION

Advancement Technology Transformation

University Advancement has embarked on a multi-year Technology Transformation initiative with a focus on implementing leading practice, enterprise technology solutions to empower our staff to achieve UA's ambitious goals more efficiently and effectively. Throughout this project we will be evaluating the entire UA technology landscape to promote our project outcomes:

- Sunset disparate point solutions in favor of a connected suite of tools centered around the Salesforce platform and ecosystem.
- Natively exchange data between UA and campus systems following best practices and aligned

Project Updates

Sprint 8 Launch (Week of 2/3/2025)
The UCR sprint team has steadfastly completed the Bio/Demo sprints and currently working on the Gift Processing sprints.

Name Our New CRM

Project Milestones

- Completed Sprints 1-6
- January 28-30, 2025: Attain Site Visit
- January 10, 2025: Reporting Workstream Kick Off
- May 31, 2024: Kickoff Slides & Recordings
- May 23, 2024: Project Kickoff with Attain and UA Project Teams Assembled for implementation
- February 12, 2024: UA Transition to Zoom Phones in March
- February 5, 2024: UA Selects Attain Partners to Serve as Implementation Consultants
- December 15, 2023: UA Selects ascend CRM
- October 25, 2023: VCUA Formally Announces UA's Transition to Salesforce

Project Resources

- UA Project Sprint Details
- UA Project Teams
- May 2024 Lunch 'n Learn Slides
- January 2024 Lunch 'n Learn Slides
- October 2023 Lunch 'n Learn Slides

Featured Spotlight: Dr. Mai Vang

Meet Dr. Mai Vang who is the Director of Constituent Management and Technologies (CMT) within Administrative Services supporting University Advancement at UCR. Dr. Vang joined the University Advancement (UA) team in May 2023 and has quickly asserted herself as the go-to person for our Technology Transformation projects.

In December 2023, the UA Leadership Team endorsed the Advancement CRM Selection Workgroup's recommendation to move forward with procuring ascend by UC Innovation to replace Raiser's Edge as Advancement's next CRM. In May 2024, after ascend by UC Innovation and Attain Partners were procured, Dr. Vang took on two additional roles as the Project Management Lead and Technology Sponsor. As the Technology Sponsor, Dr. Vang provides technical oversight for the implementation and clears technical roadblocks to ensure participation of all relevant parties.

If you have any questions about the UA Technology Transformation, please contact Dr. Mai Vang, Director of Constituent Management & Technologies, at mai.vang@ucr.edu.





HOUSEKEEPING



Right now: UA Staff Photo



After: Lunch



At 12:50PM: Recognizing new staff, work anniversaries & peer-to-peer award drawing (must be present to win!)



LUNCH

At 12:50PM: Recognizing new staff, work anniversaries & peer-to-peer award drawing (must be present to win!)

NEW HIRES

WELCOME!



Juliana Powell



Marisa Ronca





HAPPY WORK ANNIVERSARY!

WORK ANNIVERSARIES – September - February

Andrea Ortiz
Anna Gonzalez
Austin Quick
Brandon Westenberger
Brittany Lonero-Wray
David Danelski
David Edgerton
Delphina Hughes
Devlin Smith
Ed Hirtzel
Elliot Emmer
Erin Staley
Gina Muscato
Gwen Thibeaux

Heather Morales
Ian Foster
Imran Ghor
Iqbal Pittalwala
Iris Tam
Jasmine Hill
Jeremy McWells
Jessica Weber
Jill Barber
Jill Huff
Jordan Snedcof
Josh Carter
Kelly McGrail
Kim McDade
Kris Vargas

LaDonna Ardary
Laura Williamson
Lavonda Lowe
Lisa Tyson
Margene Mastin-Schepps
Maritess Gutierrez
Melbert Sebeyan
Omar Gonzalez
Rudy Rodriguez
Sarah Nightingale
Shannon Castro
Stan Lim
Stephanie Nguyen
Taylor Ruthford
Tiffany Dana



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
- ▶ Drawings at all-staff meetings
 - ▶ Must be present to win
- ▶ Tied to our values
 - ▶ Excellence, Integrity, Accountability, Respect, Collaboration

STUDENT PANEL DISCUSSION



Moderated by Adam Daniels

Featuring

Ulises Mata '25 *Psychology & Education*

Noel Lofton '25 *Business Administration (Accounting)*

Kaylee Cheung '25 *Biology*

Sariyah Morse '26 *Political Science & Administrative Studies*

Lesley Galvan '25 *Theatre Film & Digital Production; Education,
Society, & Human Development*

15-MINUTE BREAK



Enjoy UCR's own Scoops Ice Cream

TOPICAL BREAKOUT DISCUSSIONS



LOGISTICS

- UALT identified 7 discussion prompts
- A handout is being passed around – one for each person, outlining each prompt
- We will assign tables to a prompt
- We'll have about an hour for small group discussion
- Then we'll come back together to report out at about 3PM

TABLES 1 & 2

Effective FY26 operational
planning

TABLES 3 & 4

Maximize UA travel

TABLES 5 & 6

Strategies to roll out the new
Chancellor

TABLES 7 & 8

Extending the lifespan of UA
content

TABLES 9 & 10

Leveraging the expertise of
UCRAA/UCRF leadership

TABLES 11 & 12

Growing constituent affinity

TABLES 13 & 14

Supporting enrollment growth

TABLES 15 & 16

Choose your own adventure!

REPORTS FROM BREAKOUT DISCUSSIONS



Effective FY26 operational planning

We are launching a revised FY26 planning process in May/June 2025 to plan for the new fiscal year beginning July 1. This time frame will take place a bit later to allow teams to make planning decisions with more budget details in place. How might we structure this annual planning (templates, process, etc.) to encourage the identification of shared UA priorities and the development of tactics that leverage cross-functional collaboration across UA departments?



Maximize UA travel

As key ambassadors of UCR, our teams frequently travel across the country to donor visits, engagement events, PR visits, recruitment efforts, etc. When staff travel or when we host events outside Riverside, how can we collaborate across departments to develop a comprehensive strategy in that city/region to advance our department's many external relations and engagement aims?



Strategies to roll out the new Chancellor

After twelve years of leadership, Chancellor Wilcox will be retiring this year. With a new Chancellor expected to be in place sometime in early FY26, how can we best utilize this opportunity for engagement across constituencies in our efforts to introduce the larger UCR community to the new Chancellor?



Extending the lifespan of UA content

Our teams create many engaging pieces of content throughout the year: stories, infographics, photo/videos, etc. designed to share the great work UCR is doing and communicate impact to drive reach, engagement, enrollment, and philanthropy. How can we strategically repurpose existing content across different teams' varied use cases to extend their lifespan and reach new audiences?



Leveraging the expertise of UCRAA/UCRF leadership

Our UCR Alumni Association and Foundation board members bring expertise from many different fields including banking/finance, business, brand/marketing, engineering, high tech/IT, health/medical, legal, government/nonprofit, etc. Many are interested in becoming more engaged by advising and taking part in the work to advance UCR. How might we leverage their expertise in such a way as to both benefit our work and engage these volunteers in a meaningful way?



Growing constituent affinity

What are some creative and cost-effective ways to grow UCR constituent affinity that can be accomplished at scale?



Supporting enrollment growth

Recognizing that enrollment growth is a key campus priority and a primary revenue driver, how might each UA department participate in that effort more fully and support enrollment growth as part of their work?



Table 15 & 16

Which prompt did you select and what would you like to share with the group from your discussion?

ADJOURN

