

## UNIT REPORT

**Enrollment Management -  
Reviewer's Report – IE**

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# Advancement

## Advancement

**Mission Statement:** To be a catalyst in securing and managing private support for university priorities.

**Start:** 07/01/2021

**End:** 06/30/2022

**Progress:**

**Unit/College:** Advancement

**Responsible Roles:** Tom Mitchell (tmitchell@ufl.edu)

## Goal 1 Talent Management

### Goal:

Retain, acquire, and develop a community of employees and volunteer talent leveraging unique knowledge and skills to advance the campaign

### Action Items:

1. Drive retention and engagement through targeted programming; intentionally invest in top talent/mission critical employees throughout the organization.
2. Source, recruit, select, and on-board at least 7 new strategic priority positions; maintain a critical mass of fundraisers.
3. Strategically invest in UFA culture; foster an increasing awareness of diversity, equity, and inclusion (DEI) within the organization.
4. Enhance the Supervisory Essentials programming to further equip UFA supervisors with essential leadership knowledge, skills, and abilities.

### Measures of Action Items:

1. Retain 92% of identified top talent, 88% of fundraisers, 90% of overall employees; maintain a minimum of 96% completion rate for onboarding of new hires; align talent management measures within the industry.
2. Fill the approved 7 strategic priority campaign positions as determined by the Vice President of Advancement and senior organizational leader; Reimagine the Talent Acquisition strategy and documents to encompass resources and materials to attract the nation's top talent to the University of Florida.
3. Conduct regular pulse surveys to assess culture and engagement; maintain a minimum of 19% diversity representation; maintain quarterly DEI discussion sessions; establish long-term plan to continue growth of DEI within the organization; Hire a full-time recruiter.
4. Broaden Supervisory Essentials programming by creating a consistent cadence of sessions on a quarterly basis. Enhance session design to deliberately include more peer-to-peer learning opportunities. In conjunction with Talent Management, partner with co-presenters and internal/external subject matter experts to provide robust discussion, topics and resources that are beneficial tool for UFA supervisors.

### Time Period of Action Items:

1. 7/1/21 to 6/30/22
2. 7/1/21 to 6/30/22
3. 7/1/21 to 6/30/22
4. 7/1/21 to 6/30/22

### Resources of Action Items:

1. UF Advancement Leadership, College & Unit Advancement Leadership, Talent Management Team, UF Human Resource Services
2. FY22 budget, UF Advancement supervisors, Talent Management, UF Human Resource Services
3. FY22 budget, UF Advancement Leadership, College & Unit Advancement Leadership, Academic Leadership, Talent Management Team, Volunteers
4. FY22 budget, UF Advancement Leadership, Talent Management Team

### Results and Evaluation:

1. The Talent Management team calculated and reviewed the organizations employment data and established that for FY22 there was an overall retention rate of 90% for the identified top talent, 82% of fundraisers, 88% of overall employees. While the retention percentages were below the anticipated goals, this was attributed to the turnover typically seen at the end of a capital campaign. Advancement was able to maintain a 97% completion rate for onboarding of new hires which aligned with goal of meeting a minimum of 96%.
2. At the beginning of FY22 the UF Advancement Vice President and senior organizational leadership identified 7 strategic priority campaign positions that were slated to be filled through a competitive search process in the FY. Overall 5 of the 7 strategic priority positions were filled within the fiscal year. One position was closed and is slated to reopen in FY23. One position was placed on hold due to realignment of a department focus. This year Talent Acquisition was a priority goal. To align and attract the nation's top talent Advancement did a rebranding of all the organization's recruitment documents and materials. The project reimagined the Talent Acquisition strategy to expand resources and materials by providing a more robust recruitment experience to candidates.
3. During FY22 UF Advancement conducted 4 pulse surveys on various engagement topics to assess culture and engagement around the organization. The Talent Management team then reviewed and assessed the results providing UFA leadership an overall report of feedback filtered by Centers of Excellence within the organization. The organization maintained 19% of overall diversity representation and 14% diversity representation for Development. On a quarterly basis the organization hosted Helping Advancement Nurture Diversity or H.A.N.D. sessions to foster DEI discussions. The Talent Management team was able to add a new role of Assistant Director of Diversity and Engagement through a competitive search process to help focus and establish a long-term plan and continue growth of DEI within the organization. The Talent Management team was also able to hire a Recruiter to assist with elevating the recruitment process at UF Advancement.
4. During FY22 the Talent Management team reviewed the Supervisory Essentials program to expand the curriculum further. Talent Management in conjunction with supervisors and subject matter experts across the organization partnered to provide quarterly sessions. While everyone in the organization was welcome, supervisors were highly encouraged to attend each session. In addition, a Microsoft TEAMS channel was created as an additional platform for updates on the program as well as monthly resources on management topics. This channel helped elicit conversations and allowed supervisors within Advancement to share pertinent information and resources on leadership.

#### ATTACHMENTS:

#### UNIT GOALS CONNECTED TO UNIVERSITY GOALS -----

##### RELATED ITEM LEVEL 1

#### **Goal 5 A strengthened public engagement of the university's programs with local, national, and international communities.**

##### **Goal:**

A strengthened public engagement of the university's programs with local, national, and international communities.

##### **Objective:**

Three objectives are associated with this goal.

- Objective 1. Increased engagement and outreach of UF programs leading to positive impacts in such areas as health, the economy, environment and community.
- Objective 2. Improved communication leading to increased public awareness of and value placed on UF programs and their impact on society.
- Objective 3. Increased technology translation and entrepreneurial activities.

##### RELATED ITEM LEVEL 1

#### **Goal 7 A physical infrastructure and efficient administration and support structure that enable preeminence.**

##### **Goal:**

A physical infrastructure and efficient administration and support structure that enable preeminence.

##### **Objective:**

Three objectives are associate with this goal.

- Objective 1. A campus with updated facilities, including modern research laboratories, classrooms to support state-of-the-art teaching and learning, contemporary residence halls, and high-quality technology infrastructure.
- Objective 2. An efficient and effective administration that provides superior business services to the campus community, proactively streamlines processes to minimize burden and redundancy, incentivizes excellence through budget appropriations, and attracts and retains talented staff through ongoing professional development opportunities and competitive compensation.
- Objective 3. An attractive, sustainable and safe, campus that offers a high quality of life to faculty, staff, students, alumni and the community, making UF a desirable place to visit, live, work and play.

## **Goal 2 Strategic Communications Marketing & Engagement**

**Goal:**

To create inspiring, impactful messages/stories that inform, educate, and motivate internal and external stakeholders to advocate and invest in the University of Florida, as well as appropriately acknowledging, recognizing, engaging and reporting to those stakeholders

**Action Items:**

1. Plan and execute internal UF Advancement staff celebrations to show dedication and perseverance of work throughout the Go Greater Campaign.
2. Plan and execute a Day of Gratitude to event campus wide to commemorate the significant strides made during the Go Greater campaign and recognize the milestone of reaching the \$3 billion campaign goal.
3. Increase efficiency by hiring additional personnel to execute a comprehensive campaign communications plan and university priorities.
4. Launch the Campaign Stewardship Initiative.

**Measures of Action Items:**

1. Strategize, plan and execute internal UFA celebrations across the organization.
2. Strategize, plan and execute Day of Gratitude events to be held on October 14, 2022.
3. Hire an Executive Director of Strategic Engagement position.
4. Develop and execute a One-UF Go Greater stewardship strategy.

**Time Period of Action Items:**

1. 7/1/21 to 6/30/22
2. 7/1/21 to 6/30/22
3. 7/1/21 to 6/30/22
4. 7/1/21 to 6/30/22

**Resources of Action Items:**

1. Strategic Communications Marketing & Engagement Team, Campus Partners, External Vendors, Talent Management Team
2. Strategic Communications Marketing & Engagement Team, Alumni Relations, Campus Partners, External Vendors, Technology, VP & Campaign Events Team
3. Strategic Communications Marketing & Engagement Team, Donor Relations Team
4. Strategic Communications Marketing & Engagement Team, Donor Relations Team, Principal Gifts Team

**Results and Evaluation:**

1. The Strategic Communications, Marketing and Engagement team worked this Fiscal Year to strategize, facilitate, and plan a series of events and activities for UF Advancement staff throughout the year. These staff celebrations were held at Emerson Alumni Hall and at remote locations to celebrate the hard work and dedication and perseverance of the UFA staff during the longevity of the Go Greater Campaign.
2. The Strategic Communications, Marketing and Engagement team worked this Fiscal Year to strategize, facilitate, and plan in accordance with UF leadership and campus partners for a campus wide day of Gratitude event to be executed on Friday, October 14, 2022. This campus wide recognition will commemorate the significant strides made during the Go Greater campaign and recognize the milestone of reaching the \$3 billion campaign goal.
3. Successfully hired an Executive Director of Strategic Engagement on January 25, 2022 through a competitive search process. This role has assumed leadership of the Strategic Communications and Marketing team and works with senior leaders across campus to provide unified messaging and support for UF Advancement and University priorities as well as comprehensive campaign communications.
4. In June 2021, UF Advancement launched a strategy around Go Greater stewardship which included a pilot program titled Gratitude Tour to recognize and show appreciation to top principal gift donors that contributed to the Go Greater Campaign. This year there was one tour completed. These efforts will continue into fiscal year 2023 and the close of the Go Greater Campaign.

**ATTACHMENTS:**

## UNIT GOALS CONNECTED TO UNIVERSITY GOALS -----

## RELATED ITEM LEVEL 1

**Goal 4 Growth in research and scholarship that enhances fundamental knowledge and improves the lives of the world's citizens.****Goal:**

Growth in research and scholarship that enhances fundamental knowledge and improves the lives of the world's citizens.

**Objective:**

Four objectives are associated with this goal.

- Objective 1. Documented advances in productivity and recognition of UF research programs.
- Objective 2. Exceptional graduate and postdoctoral scholars who will contribute to influential research and scholarship.

- Objective 3. Increased extramural and intramural funding that enhance both basic and translational research.
- Objective 4. Processes and systems that facilitate excellence in research and scholarship.

#### RELATED ITEM LEVEL 1

### Goal 5 A strengthened public engagement of the university's programs with local, national, and international communities.

#### Goal:

A strengthened public engagement of the university's programs with local, national, and international communities.

#### Objective:

Three objectives are associated with this goal.

- Objective 1. Increased engagement and outreach of UF programs leading to positive impacts in such areas as health, the economy, environment and community.
- Objective 2. Improved communication leading to increased public awareness of and value placed on UF programs and their impact on society.
- Objective 3. Increased technology translation and entrepreneurial activities.

### Goal 3 Alumni Relations & Annual Giving

#### Goal:

To drive involvement and engagement of alumni, friends, parents, families, and students with the University by fostering their passion, partnership, and investment through targeted and broad-based initiatives.

#### Action Items:

1. Increase alumni participation and support of UF.
2. Increase awareness and support of three university mini campaigns focus on Diversity, Equity and Inclusion, Artificial Intelligence and the Machen Florida Opportunity Scholars program.
3. Increase efficiency by restructuring current team to better align duties and further outreach of Alumni Relations and Annual Giving strategic planning.
4. Plan, coordinate and execute Gator Nation Giving Day, in partnership with UFA Development Teams.

#### Measures of Action Items:

1. Increase the alumni participation rate to 20% by reaching 66,500 APR donors.
2. Create and execute an alumni diversity awards program that integrates our minority Affiliate Groups and recognizes key UF alumni. Create an online community for university-wide AI stakeholders. Attain 100% participation from the UFAA Board of Directors in support of the Machen Florida Opportunity Scholars Program.
3. Hire a new Executive Director of Annual Giving, adjust reporting line and department structure to better align with organizational goals.
4. Secure 23,000 gifts totaling \$26M dollars by February 18, 2022 for Gator Nation Giving Day.

#### Time Period of Action Items:

1. 7/1/21 to 6/30/22
2. 7/1/21 to 6/30/22
3. 7/1/21 to 6/30/22
4. 7/1/21 to 6/30/22

#### Resources of Action Items:

1. Alumni Relations Team, Alumni & Friends, UFAA Board of Directors, Communications, Data, Technology, University Initiatives and Student Affairs
2. Alumni Relations Team, Alumni & Friends, UFAA Board of Directors, Communications, Data, Technology, University Initiatives and Student Affairs
3. Alumni Relations Team, Communications, Talent Management, UFA Leadership
4. Alumni Relations & Annual Giving Team, Alumni & Friends, DIS, Communications, Technology, UFA Leadership, UFA Development Teams, Operations, Student Affairs, and UFAA Board of Directors

#### Results and Evaluation:

1. In FY22, UF Advancement and the UF Alumni Association met the goal or achieving a 20% alumni participation rate. The participation rate provided 62,800 in support for alumni.
2. Executed several mini-campaigns around DEI, MFOS and AI. In regards to DEI, we marketed and executed the Inaugural LeADershIp (DEI) Awards program; created a DEI workgroup on the UFAA Board of Directors; Asst Dir outlined framework of a DEI community. For MFOS, the UFAA Board of Directors had 100% participation of philanthropic support to the MFOS fund. Finally, within AI, we partnered with AI colleagues on campus and created professional development courses for alumni members to sign up for throughout the calendar year.
3. Successfully hired an Executive Director of Annual Giving on January 21, 2022 through a competitive search process. The UF Advancement Annual Giving team has been restructured to better align the departmental duties to meet the organizational goals.

4. Gator Nation Giving Day exceeded the goals and brought in a total of 26,054 gifts for a total of \$20M.

#### ATTACHMENTS:

#### UNIT GOALS CONNECTED TO UNIVERSITY GOALS -----

##### RELATED ITEM LEVEL 1

#### Goal 1 The University of Florida offers an exceptional academic environment for all.

##### Goal:

An exceptional academic environment that reflects the breadth of thought essential for preeminence, achieved by a community of students, faculty and staff who have diverse experiences and backgrounds

##### Objective:

Four objectives are associated with this goal.

- Objective 1. UF students, faculty and staff with increasingly diverse demographic and geographic characteristics.
- Objective 2. A university climate that is inclusive, supportive and respectful to all.
- Objective 3. Diverse, robust educational and interdisciplinary areas of excellence.
- Objective 4. Increased globalization to enhance our effectiveness as world citizens.

##### RELATED ITEM LEVEL 1

#### Goal 5 A strengthened public engagement of the university's programs with local, national, and international communities.

##### Goal:

A strengthened public engagement of the university's programs with local, national, and international communities.

##### Objective:

Three objectives are associated with this goal.

- Objective 1. Increased engagement and outreach of UF programs leading to positive impacts in such areas as health, the economy, environment and community.
- Objective 2. Improved communication leading to increased public awareness of and value placed on UF programs and their impact on society.
- Objective 3. Increased technology translation and entrepreneurial activities.

##### RELATED ITEM LEVEL 1

#### Goal 6 Alumni who are successful in their careers and in life and who are proud to be graduates of the University of Florida.

##### Goal:

Alumni who are successful in their careers and in life and who are proud to be graduates of the University of Florida.

##### Objective:

Two objectives are associate with this goal.

- Objective 1. Alumni who make significant contributions to their professions and society.
- Objective 2. Alumni who engage with and support the University's educational, research, and service missions.

### Goal 4 Development

##### Goal:

To identify and cultivate well-informed, inspired advocates who consider the University a top philanthropic priority and will ultimately invest in the University of Florida

##### Action Items:

1. Leverage the Go Greater campaign to drive philanthropic commitments, particularly at the leadership and principal gift levels.
2. Strengthen campus partnerships to grow the total number of MFOS scholars supported annually.
3. Partner with university and industry leadership to actualize the vision for AI University.
4. Identify top campaign supporters to participate in campaign stewardship events.
5. Plan and execute university and unit mini-campaign priority projects.

##### Measures of Action Items:

1. Reach \$3.8B in total campaign commitments.
2. Secure \$550M in total commitments for MFOS (\$1.5M new cash).
3. Secure \$100M in funding and launch AI University Summit.
4. Create a strategic plan to identify and outline stewardship events to top supporters of the campaign.
5. Execute 8 mini-campaign university and unit priority projects.

##### Time Period of Action Items:

1. 7/1/21 to 6/30/22
2. 7/1/21 to 6/30/22
3. 7/1/21 to 6/30/22
4. 7/1/21 to 6/30/22
5. 7/1/21 to 6/30/22

**Resources of Action Items:**

1. UF Advancement Leadership, Campus Partners/Stakeholders, Communications, Data, Technology
2. UF Advancement Leadership, Campus Partners/Stakeholders, Data, VP & Campaign Events, Technology, Annual Giving, Gift Planning, Principal Gifts, University Initiatives
3. UF Leadership, UF Advancement Leadership, Campus Partners/Stakeholders, Data, Gift Planning, Technology
4. UF Advancement Leadership, Campus Partners/Stakeholders, Communications
5. UF Advancement Leadership, UF Leadership, Campus Partners/Stakeholders, Communications

**Results and Evaluation:**

1. The UF Advancement Development team had a record-breaking fundraising year in securing \$1.1B in Campaign Commitments, and \$684M in VSE. Our team closed 72 leadership gifts totaling \$120M in total support. Our Principal Gift year was another record year closing \$623M of the total raised.
2. In FY22 there was over \$4M in new Machen Florida Opportunities Scholars commitments raised and over \$1M in new cash commitments. In FY22, the university awarded over 1,200 MFOS scholarships.
3. Through university partnerships and industry leading experts, the organization raised nearly \$50M in funds to support the AI University initiative.
4. UF Advancement leadership has identified the top campaign supporters and our units kicked off our Gratitude Tour in May 2022 and anticipate delivering over 1,200 gifts. Our celebration event is scheduled for October 14, 2022 where these top supporters will be invited to attend a number of celebrations taking place on campus.
5. In FY22 the UF Advancement Development team focused on 12 mini-campaigns and capital priority projects supporting both unit and university priorities. In the last half of FY22 we kicked off the fundraising efforts for the West Palm Beach Initiative, securing over \$51M in commitments. This will continue to be a priority moving into FY23.

**ATTACHMENTS:**

## UNIT GOALS CONNECTED TO UNIVERSITY GOALS -----

## RELATED ITEM LEVEL 1

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Four objectives are associated with this goal.

- Objective 1. UF students, faculty and staff with increasingly diverse demographic and geographic characteristics.
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## RELATED ITEM LEVEL 1

**Goal 2 An outstanding and accessible education that prepares students for work, citizenship and life.****Goal:**

An outstanding and accessible education that prepares students for work, citizenship and life.

**Objective:**

Four objectives are associated with this goal.

- Objective 1. A high quality, widely recognized, financially accessible undergraduate, graduate and professional education and experience.
- Objective 2. Services that are accessible and available in a timely fashion that support student health, development, and well-being, thereby improving their academic and personal growth and success.
- Objective 3. Academic programs that promote effective and accessible learning through innovation.
- Objective 4. High quality student-faculty interactions in mentored research.

## RELATED ITEM LEVEL 1

**Goal 3 Faculty recognized as preeminent by their students and peers.****Goal:**

Faculty recognized as preeminent by their students and peers.

**Objective:**

Five objectives are associated with this goal.

- Objective 1. An increased number of faculty recognized by distinguished awards, fellowships, and memberships.
- Objective 2. An increased number of high-impact scholarly publications and creative works.
- Objective 3. An increased professional and public visibility of UF faculty.
- Objective 4. An increased faculty participation in professional service and leadership.
- Objective 5. A nurturing and invigorating academic and professional environment for all faculty across the research, teaching, and service missions of the university.

## RELATED ITEM LEVEL 1

**Goal 4 Growth in research and scholarship that enhances fundamental knowledge and improves the lives of the world's citizens.****Goal:**

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- Objective 1. Documented advances in productivity and recognition of UF research programs.
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## RELATED ITEM LEVEL 1

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#### RELATED ITEM LEVEL 1

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#### **Goal:**

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- Objective 1. A campus with updated facilities, including modern research laboratories, classrooms to support state-of-the-art teaching and learning, contemporary residence halls, and high-quality technology infrastructure.
- Objective 2. An efficient and effective administration that provides superior business services to the campus community, proactively streamlines processes to minimize burden and redundancy, incentivizes excellence through budget appropriations, and attracts and retains talented staff through ongoing professional development opportunities and competitive compensation.
- Objective 3. An attractive, sustainable and safe, campus that offers a high quality of life to faculty, staff, students, alumni and the community, making UF a desirable place to visit, live, work and play.

## **Goal 5 Operations**

#### **Goal:**

To encourage all individuals to foster a culture of Gold Standard service and appreciation that will lead to enhanced efficiencies/revenues that will ultimately benefit the University of Florida.

#### **Action Items:**

1. Maintain on-time and on-budget implementation of Salesforce/ascend CRM, keeping pace with an 18-24-month implementation.
2. In partnership with UFIT, finalize the project plan and begin implementation of FY22 priority projects.
3. Continue to improve fund utilization across campus.

#### **Measures of Action Items:**

1. Meet 95% of the AEN functional sprint targets within the fiscal year and integrate data migration and reporting workstreams.
2. Implement master data management and integrations as part of AEN and migrate UFF email to the university.
3. Establish a 95% budget utilization and reduce low utilization of funds by 10%.

#### **Time Period of Action Items:**

1. 7/1/21 to 6/30/22
2. 7/1/21 to 6/30/22
3. 7/1/21 to 6/30/22

#### **Resources of Action Items:**

1. University Leadership, UF Advancement Leadership, Consulting Partners, Data Services/DIS, UF Advancement IT, Project Management & Business Analysis, All Advancement Teams as Subject Matter Experts
2. Data Services/DIS, UF Advancement IT, UFIT, Project Management & Business Analysis, Business Process Management
3. Disbursements, Legal Services, Financial Services, Technology Services, Data Services, Talent Management, and UF Advancement Leadership

#### **Results and Evaluation:**



1. In FY22, UF Advancement initiated a full CRM conversion implementation that is expected to last 18-24-months. The Strategy and Operations team completed 4 of the 11 functional sprints for the project. This included hosting 800 Advancement Engine Next sprint meetings with 165 UF Advancement partners and the CRM project crew members. We continue to monitor the projects and timeline, including the master data management and integrations, and remain on track to go live in the Fall of 2023.
2. Our UF Advancement Project Management and IT Teams have worked closely with UF IT to establish a project plan to migrate the email system to UF IT around priority times and events. The project and email migration are on track to be completed by end of 2022.
3. Central Advancement utilized 96% of its operating budget for FY22. A total of 168 out of 492 low-utilization funds were cleared, for a clearance rate of 34%. Additionally, for FY22, 95% of the 894 fund administrators completed the required fund administrator training and the donor satisfaction rate for endowment reporting was 96%.

#### ATTACHMENTS:

#### UNIT GOALS CONNECTED TO UNIVERSITY GOALS -----

##### RELATED ITEM LEVEL 1

#### **Goal 4 Growth in research and scholarship that enhances fundamental knowledge and improves the lives of the world's citizens.**

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##### RELATED ITEM LEVEL 1

#### **Goal 5 A strengthened public engagement of the university's programs with local, national, and international communities.**

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- Objective 3. Increased technology translation and entrepreneurial activities.

## Advancement IE Detail

**Providing Department:** Advancement

### **Administrative Support Services:**

The fundraising program at UF is what is called in the industry a centralized/ decentralized program. This means that the significant majority of fundraising is done based on college/unit/program donor affiliation. Accordingly, each college and unit has at least one development professional assigned to that program. UF Advancement, however, provides strong central services to the University and to each of those colleges and units. This includes management of a central database (900,000+ entries), maintenance of central gift records, receipting of all gifts given to any unit of UF, provision of central services like IT, accounting, tax, real estate and legal services related to gifts and gift fund management (over 10,000 funds). Additionally, UF Advancement provides leadership on principal gifts strategy and stewardship, annual giving, and central donor relations services for enhanced and consistent stewardship for donors of UF. These services are provided to the UF community to ensure consistency in our management of gifts, maintenance of essential central gift records, and proper receipting and management of all gifts. The centralization of these services provides great economies of scale to the entire UF community, provides important expertise for all areas of UF and additionally ensures confidentiality of donor records.

- In all of our strategic and annual planning processes, we set quantitative and qualitative goals for each service area, based on peer data and best practices.
- UF Advancement maintains a centralized budget process for all UF fundraising programs, and reviews/approves all college and unit fundraising budgets, salary requests, new hires, etc.
- UF Advancement has an external independent audit completed annually by RSM LLP, a nationally ranked accounting firm with expertise in the nonprofit area. This is reviewed and presented to the Board of Directors Audit Committee.
- UF Advancement engages the services of the University's internal auditors to perform 3-4 internal audits annually. The priority of the internal audits is set by the Board of Directors Audit Committee and reviewed by them on a rolling basis during the year. This includes

one annual internal audit of donor restricted funds (approximately 75-100), as part of UF Advancement's overall plan to secure fidelity to donor purposes on donor restricted funds.

- Budget/spending is overseen by the Board of Directors Finance Committee which receives a quarterly report on "actual to budget," variances, etc.
- The investment management of UF's endowment has been delegated by the Board of Directors Finance Committee to the University of Florida Investment Corporation (UFICO), UF's investment company. This is documented in a written management agreement. The goals, benchmarks and risk tolerances, for each UFF investment pool are set by the Finance Committee and reviewed annually with UFICO. The Finance Committee also establishes financial policies and the endowment spending policy.

#### **Academic and Student Support Services:**

UF Advancement is responsible for raising and managing gift dollars for all areas of the University of Florida. The UF President, Provost and Deans/Directors inform UF Advancement of top fundraising priorities for the University and within each college/unit. These priorities consist of substantial gift support for endowed faculty positions (chairs, professorships, visiting professorships, and faculty fellowships), support for undergraduate scholarships, graduate fellowships as well as gifts to enhance teaching and related programs. UF Advancement tracks and manages these fundraising priorities ensuring the University of Florida is on track to reach its fundraising goals in support of university wide priorities. We also track the amount of endowment spendable transfers provided to UF for scholarships, fellowships, faculty positions, research, etc.

#### **Research:**

UF Advancement corporate and foundation staff work collaboratively with faculty from across campus to assist with the preparation and stewardship of philanthropic grant proposals to support research. UF Advancement also directly raises private gifts to provide research support. UF Advancement specifically reports annually how much in endowment transfers is made to UF to support research.

#### **Community and Public Service:**

UF Advancement supports UFAA's efforts to provide public and community service. Our central administrative services, as more thoroughly described above, provide service on a daily basis to the UF community.

#### **Effectiveness Oversight:**

The effectiveness of the UF fundraising and fund management programs is overseen by the UF Vice President for UF Advancement, who also serves as the Executive Vice President of the UF Foundation. The Vice President reports directly to the UF President who oversees all progress, as does the Board of Directors through reports at meetings from the Executive Vice President, review and evaluation by the various board committees against established performance criteria, and overall by the Executive Committee of the Board of Directors who reviews the annual business plans, budgets and progress.

<b>Name</b>	<b>Department Affiliation</b>	<b>Email</b>	<b>Phone</b>
Tom Mitchell	Vice President, UF Advancement	tmitchell@uff.ufl.edu	352-392-5407
Melissa Long	Executive Director of Talent Management	mlong@uff.ufl.edu	352-846-1127
Kalliope King	Talent Management & Strategic Planning Specialist	kking@uff.ufl.edu	352-846-3627

**Institutional Effectiveness Report Complete:** true

**XResponsible Roles:**

### **Advancement Actions for Improvement**

#### **Unit/College Actions for Improvement :**

**Talent Management:** Based on the results of FY22, Talent Management will continue to work on talent acquisition and recruitment of new talent to ensure we have a strong fundraising and advancement population. Moving forward we will seek to increase FTE to potentially increase the total employee count for UF Advancement in preparation for the next campaign. Talent Management will focus efforts on the retention of employees through career development plans, engagement and talent development opportunities organization-wide to ensure clear opportunity for growth for UF Advancement employees. In FY23 there will be a focus on regular pulse surveys and an annual engagement survey to gather feedback and assess trends to prepare for next.

**Strategic Communications Marketing & Engagement:** Going forward the Strategic Communications team plans to:

- Host a culminating event for staff on Jan. 19, 2023 from 5-7 pm on campus to celebrate the Go Greater campaign.
- Conceded planning and execution of Day of Gratitude event to UFHR and the Division of Student Life since the audience was comprised of students, faculty and staff.
- Transitioned planning and execution responsibilities to new Executive Director. Continue Go Greater Appreciation and Gratitude Tour through Dec. 31, 2022.

**Alumni Relations & Annual Giving:** Per UF's request, the Alumni Participation Rate (APR) will be maintained at 20% for FY23. We will be launching a redesigned UF license plate (Jan. 2023) with communications and marketing starting in October 2022. Our goal is to increase the number of UF plates on the road from 93,000 to 200,000 by 2025. The license plate program is our largest APR driver. We have also hired a new data analyst for the annual giving team that will assess and evaluate annual giving donor behaviors on an ongoing basis. This will help us determine the right prospects to target who have the highest likelihood of making a gift to UF. This year marks the 5<sup>th</sup> anniversary of Giving Day (2/16/23) which is another key APR driver that touches all parts of the Gator Nation. We will increase the number of challenge gifts and work with our development teams to ensure every development officer closes a gift for Giving Day. We are also looking into how to increase the UFAA membership endowment by creating a membership giving campaign.

**Development:** Our efforts have steadily improved each year of the campaign, as a result the FY22 fundraising was our most successful year yet. To continue this trajectory, we have worked to identify opportunities with the tools already accessible to encourage new support. For FY23 we have worked with the provost office to identify ways we can match new endowed faculty commitments. We hope that this will encourage new faculty support of cash gifts valued at \$1M+. Our gratitude tour continues through the end of the calendar year as we also begin the prep work to plan for the next campaign. We have hired a consultant that will be reviewing the work from Go Greater to help us map out a plan for next.

**Operations:** In FY22 we officially began the data conversion work for the CRM migration, because of this we plan to add resources and retention strategies in these areas to help with the conversion work as well as maintaining the day-to-day work outside of the conversion, which would include things like the UF IT Migration project. In regard to fund utilization, as part of our plan for the upcoming year we are working on reorganizing our operational teams to create a team focused on donor compliance. This group would be responsible for low fund utilization along with other areas around donor compliance.

#### **XResponsible Roles:**

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