

# INSTITUTIONAL ADVANCEMENT

PBA | NOVEMBER 10, 2022



# # 1 FUNDRAISING PRIORITY







# IA 2021-2022 BUDGET



Institutional Advancement represents 1.99% of the total UVU appropriated budget

Development	2021-22	FTE
Office of AVP of Development (includes all area salaries, benefits, hourly)	\$1,631,606	7
Directors of Development	\$18,175	8
Annual Giving	\$132,164	5
<b>Development Total Appropriated</b>	<b>\$1,781,945</b>	<b>20</b>

Alumni Relations	2021-22	FTE
Alumni Relations (includes all area salaries, benefits, hourly)	\$572,611	5.5
<b>Alumni Relations Total Appropriated</b>	<b>\$572,611</b>	<b>5.5</b>

Central Advancement	2021-22	FTE
Advancement Services & I.T. (includes all area salaries, benefits, hourly)	\$1,149,336	10.5
Accounting	\$0.00	4
Prospect Development	\$0.00	3
<b>Central Advancement Total Appropriated</b>	<b>\$1,149,336</b>	<b>17.5</b>

Strategic Engagement	2021-22	FTE
Office of AVP of Strategic Engagement (includes all area salaries, benefits, hourly)	\$623,332	3
Donor Relations	\$0.00	3
Marketing & Strategic Communication	\$0.00	6
Scholarships	\$0.00	1
Executive Events	\$527,344	7
<b>Strategic Engagement Total Appropriated</b>	<b>\$1,150,676</b>	<b>20</b>

VP of Institutional Advancement	2021-22	FTE
Office of VP of IA & Contingencies (includes all area salaries, benefits, hourly)	\$1,163,248	5.5
UVU Foundation	\$0.00	NA
<b>VPIA Total Appropriated</b>	<b>\$1,163,248</b>	<b>5.5</b>

## Total Endowment Funds By Area:

VP of Institutional Advancement	\$447,073.00
AVP of Development	\$297,689.00
AVP of Strategic Engagement	\$560,293.00
Advancement Services & I.T.	\$127,422.00
Alumni Relations	\$110,000.00

The revenue from the Gift Fee for FY 22 was \$181,429.

IA Budget: \$5,817,815 (Approp) + \$1,542,477 (Non-approp) = \$7,360,292  
68.5 FTE (all salaries are paid from appropriated funds)

# OUR CURRENT CONTEXT



## PHASE 1: Oct 1 – Oct 22

- Stabilize team through transition
- Launch campaign
- Land President's Scholarship Ball
- Increase communication & transparency
- Communicate with key donors & board members
- Engage advisors

## PHASE 2: Oct 24 – Dec 21

- Assess structure
- Fill vacancies, assess positions, make key moves
- Achieve clarity of resources
- Prepare for PBA
- Launch listening tour in IA and w/key leadership
- Establish rhythm of meetings
- Clarify divisional priorities
- Identify most critical process improvements
- Continue promoting and building campaign

## PHASE 3: Jan 3 – May 3

- Communicate 2023 calendar of donor engagements
- Strengthen boards and committees that support campaign
- Fix most critical process and structure issues
- Continue strengthening internal training and support for campaign
- Create dashboard of critical campaign progress data
- Deeper overall strategic planning for every aspect engagement internally & externally



# HIGHLIGHTS & IMPACT

UVU



# EMPLOYEE CAMPAIGN LAUNCH





# EVERGREEN

the campaign for **UVU**<sup>™</sup>



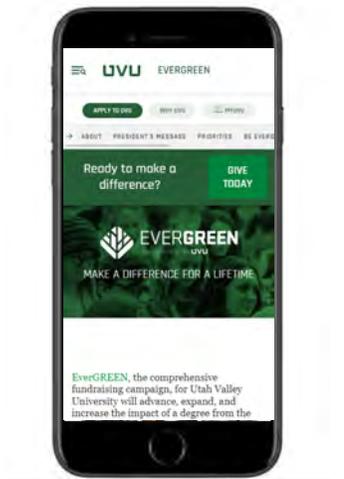
# EVERGREEN NEWSLETTER

- University's first communication piece issued to both internal/external audiences (entire IA database)
- Distribute on third Tuesday of each month
- Strategic curation of content relevant to faculty, staff, students, legislators, donors, and community
- Achieved an open rate of 26.57% for EverGREEN newsletter



# EVERGREEN WEBSITE

- Developed and launched UVU EverGREEN website: [uvu.edu/evergreen](http://uvu.edu/evergreen)
- Engagement rate – 58.73%
- Views – 10,063
- Conversions – 3,539



# EVERGREEN AMBASSADORS



Launched UVU's first ever influencer marketing program, EverGREEN Ambassadors



**Mary Crafts**  
Badass woman with a purpose, grace, and grit. Former International Caterer of the Year. Keynote Speaker. Author. 5d

For the past 20 years I have served on the board of Utah Valley University. I have watched this University go from a disregarded insignificant spot in Orem to the largest and most progressive place in the state. One of the reasons: 35% of the graduates are first generation graduates. 35% who are changing the trajectory of their families for generations to come. Something even bigger is coming in October, 2022. Stay tuned for more details! See link in my bio or click here: Link: [f.io/Ji4TlnQO](https://f.io/Ji4TlnQO)  
[#uvuunited](#) [#uvubegreen](#) [#uvu](#) [#craftingameaningfullife](#)  
Utah Valley University

**Leandra H. Hernández**  
2m · 👤

As I wrap up my semester as the Interim Academic Director for the UVU Center for Social Impact and transition to my previous role as the Associate Academic Director, I've been reflecting on the incredible work we've accomplished at UVU over the past few years mentoring students, developing initiatives across campus, developing new curricula for our departments and centers, and overall just having an amazing time.

We're also doing incredible work with enrollment. As Utah Valley University surpassed an enrollment of more than 40,000 in Fall 2021, coupled with celebrating its 80th year, I invite you to get ready for the university's next chapter coming in October 2022. Learn more here: [youtu.be/yw-7IN31HBo](https://youtu.be/yw-7IN31HBo)  
[#UVUunited](#) [#UVUBeGreen](#) [#UVU](#) [#Utah](#) [#HigherEd](#)

**Ethan Morse**  
Research Assistant to the President at Utah Valley University  
6d

I'm excited to see [Utah Valley University](#) continue to grow and support our ever-growing diverse student body. Last year, UVU grew to an enrollment of more than 40,000 and celebrated its 80th year. Amazingly, the best is still to come! To learn more about the university's next chapter coming in October, visit [youtu.be/yw-7IN31HBo](https://youtu.be/yw-7IN31HBo)  
[#UVUBeGreen](#) [#UVUunited](#) [#UVU](#) [#HigherEd](#) [#university](#)

**#UVUBeGreen**  
**#UVUunited**  
October 2022



# UPNEXT (monthly video feature)



- Institutional Advancement highlights fundraising units on campus with a call to action to give or participate
- Distributed on first Tuesday of each month
- Collaboration with UVU Studios to highlight stories via video and share on social media to educate and engage new and potential donors and influencers
- Achieved an open rate 33.7% for UPnext newsletter which is a 5.6% increase from previous year.
- Attained:
  - Click-through rate of 58%
- In collaboration with central Marketing, developing a YouTube strategy to ensure alignment



Dear First name,

Private scholarships make a dramatic difference in the lives of students at Utah Valley University (UVU). Whether annual or endowed, each scholarship provides significant support to UVU students in their pursuit of a transformative college degree. This assistance relieves financial stress, allowing individuals to focus more on academics.

The July 2022 UPnext spotlights the profound impact of the Sherman and Sheryle Cloward Endowed Scholarship on UVU students since it was created in 1998, featuring past scholarship recipients [Susan West](#) and Lauren Frederiksen, along with Kristie Kapp, daughter of the Cloward's.



# CAMPAIGN CASE STATEMENTS



- Developed 25 individual case statements for fundraising units
- Created a central repository of information for unit data, images, and alumni quotes
- Ongoing updates to reflect giving priorities of area

**LIVU**  
**Smith College of Engineering & Technology**  
 Case for Support  
 uvu.edu/evergreen

### The Smith College of Engineering and Technology At a glance

26 CFT major areas of concentration	6,068 enrolled students with a degree	1,045 graduate degree students	2,229 CFT students are non-residential
85.9% of CFT students meet 60-hour graduation requirement	5.6% increase in student population from 2017	27% of CFT students are international	
77% of CFT students are employed or self-employed on average upon graduation	12.6% increase in salary from 2017	8.6% of CFT students are in STEM fields	85% of CFT students are employed

Source: CFT Institutional Effectiveness, Smith College of Engineering and Technology

The CFT is UVU's largest college with 6,068 students. Despite repeated interest in degree programs, graduation growth, and increased degree awarded, the CFT cannot keep up with Utah demand for engineers. In 2021, Utah universities together produced more than 3,000 engineers and computer scientists, but there remained approximately 4,000 unfilled positions across Utah workplaces. This demand shows the urgency of wanting.

Engineering and computer science graduates from UVU are particularly valuable in filling the demand created by technology companies in Utah County's Silicon Spine. According to UVU's Department of Institutional Research, UVU's graduate stay and work locally. Around 84% of graduates remain in Utah after graduation for at least one year, and 70% are still in Utah 10 years after graduation. The UVU CFT can make a significant difference by increasing the capacity of the pipeline of training and supporting students interested in engineering and technology. UVU ultimately will supply an increased number of engineers required to secure the state and sustain future vitality.

The challenge is having the space and resources needed to educate the next generation of computer scientists, technicians, and engineers. At the heart of CFT's mission is to student success. With your help, we can produce a career-ready workforce, which helps students achieve professional and personal fulfillment.

For the UVU College of Engineering and Technology to prepare its students to enter the professional world as knowledge-based contributors to the field of engineering and technology, and to build forward-thinking leaders, we ask for your support our goals.

**Smith College of Engineering and Technology Goals**

- Build an innovative workforce pipeline
- Improve student success
- Expand international enrollment
- Grow STEM programs
- Expand a variety of STEM programs

1 | **Build a Culture of Engineering and Technology** | 4 | **LIVU**

### Aviation Graduate Soars

Katie Lee '23 knew she wanted to be a pilot from the first time she stepped onto a plane. She was just seven or eight and on a trip to the beach in Texas to the United States. As she watched the 747, she couldn't shake the feeling that she belonged in the air, and when she reached the U.S., she had a similar feeling.

"When I came from Taipei, Taiwan, not a lot of people had that freedom since they didn't fly," she says. "My parents thought it was crazy and that it was just a hobby, but I started looking at things exchange programs."

When she finally reached high school, her world opened. She was assigned to Lone Peak High School, about 20 miles from UVU. As soon as she graduated high school, she enrolled in UVU's aviation program.

"I found out there are so many amazing female pilots at UVU and I was not used to," she says. "At first, it was a bit of a challenge, but I started looking at things exchange programs."

In just three years, Katie completed two bachelor's degrees — one in aviation management and another in aviation science with an emphasis on professional pilot.

"I chose to get two degrees so that I can have the option to continue working in aviation management if I decide I don't want to fly anymore."

Katie received exceptional academic awards for that would be too long to list here, but she knows she could not have accomplished her goals without the help of her advisors.

Katie wants to use her education to make a difference and change lives. "I want to help as many as I can in Taiwan, and here the chance to fly for one of the major airlines there," she says. "I would also really like to come back to my state and see some success in the aviation industry."

Based on UVU Institutional Management Professional Paper

**Goal 3: Hangar "C" and Airframe & Powerplant Program**

Airframe & Powerplant (A&P) Technicians are the two Federal Aviation Administration (FAA) certifications required to become an aviation maintenance technician. The aviation mechanic certification has two components, Airframe and Powerplant. The community is in dire need for graduating A&P professionals. Currently, there is a deficit of approximately 100-qualified A&P technicians to support the needs of Utah's workforce. This certificate program will welcome 20 students annually. It will be the third program of its kind in the Utah Valley.

Investment: \$6-8 million

**EverGRATEFUL.**

By sharing your means, you will enrich the lives of students and faculty who, in turn, will lift others. CFT students, graduates, and faculty are already working to solve some of the world's most complex issues. Help them thrive. Together, we have the means to transform students' lives.

**Thank you!**

# NEW REPORTING PROCESSES



## THANK YOU FOR YOUR GENEROSITY

Greetings, I'm John Forsgren. I'm from Orem, Utah, but I'm currently finishing high school down in St. George. My major is Computer Science (emphasis in Programming) and I'm wanting to minor in either Game Programming or Game Development. I am a Senior this year at Pine View High School, so I will be starting Fall 2021 as a UVU Freshman. I am the eldest sibling of my younger brother and twice younger sister. We have a dog (a sassy Yorkie named Annie) and two cats (Ashley, an adventurous loner, and Tabitha / Tabby, a chubby extrovert). My mother and father are both UVU Alumni, having received their Associate's degrees back when it was still UVSC.

I plan on using my degree path to gain a deeper, more comprehensive, and fundamental understanding of computer science and specifically programming. I've always had an obsession with building things, and once I started learning HTML with my mom at the exciteful age of 10, I was hooked. I absolutely love programming and computer science. Building things in the real world always has some constraint, such as time, money, or physics; in programming, anything is possible if you're clever enough. I want to pursue the computer science, programming, and game development fields because I love their products and want to be able to use them to bring my dreams to life. I have so many ideas for helpful programs, API networks, learning algorithms, games, and stories that I would love to make real, but I am not yet skilled enough. This degree will mean a granting of self-unreachable knowledge, expertise, and guidance on my path to becoming a better programmer and a fulfiller of dreams.

Thank you so very much! I am very honored and humbled to have this astounding opportunity bestowed upon me. The chance to get a higher education that is free from tuition costs is indescribable. My parents, family members, and especially some older close friends of mine all have first-hand, possible, and even decades old trouble caused by the stress and difficulty of paying for college. I am forever grateful for this scholarship and the opportunity it offers to make the most of college without having to take out loans or work overtime when I should be studying. Again, I offer my most sincere gratitude for the generosity, good will, and trust you have given me with this scholarship. Many, many thanks: I won't let you down!

**Jonathan Forsgren**  
Computer Science, Saint George, UT



### Endowment Report for Fiscal Year 2021-22

## THE INTERNSHIP OPPORTUNITY FUND IN PHOTOGRAPHY

Endowment Fund Activity	\$ Amount
Beginning Fair Market Value (July 1, 2021)	30,588.99
Contributions Received	0.00
Investment Earnings	5,418.41
Cash Distributions to Expendable Fund	0.00
<b>Ending Fair Market Value (June 30, 2022)</b>	<b>\$36,007.40</b>
Expendable Fund Activity	\$ Amount
Beginning Balance (July 1, 2021)	2,899.50
Cash Distributions from Endowment Fund	1,897.98
Contributions	0.00
Expenses Benefiting Fund Purpose	0.00
<b>Ending Balance (June 20, 2022)</b>	<b>\$4,797.48</b>



### Annual Scholarship Report for Fiscal Year 2021-22

## STUDENT ALUMNI ASSOCIATION LEADERSHIP SCHOLARSHIP

Scholarship Activity	\$ Amount
Beginning Balance (July 1, 2021)	55,518.68
Contributions	19,912.00
Expenses Benefiting Fund Purpose	(27,718.85)
<b>Ending Balance (June 20, 2022)</b>	<b>\$47,711.83</b>

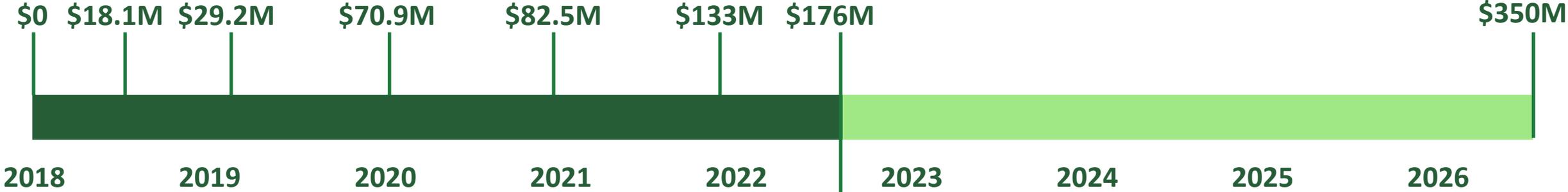
# PRESIDENTIAL SCHOLARSHIP BALL



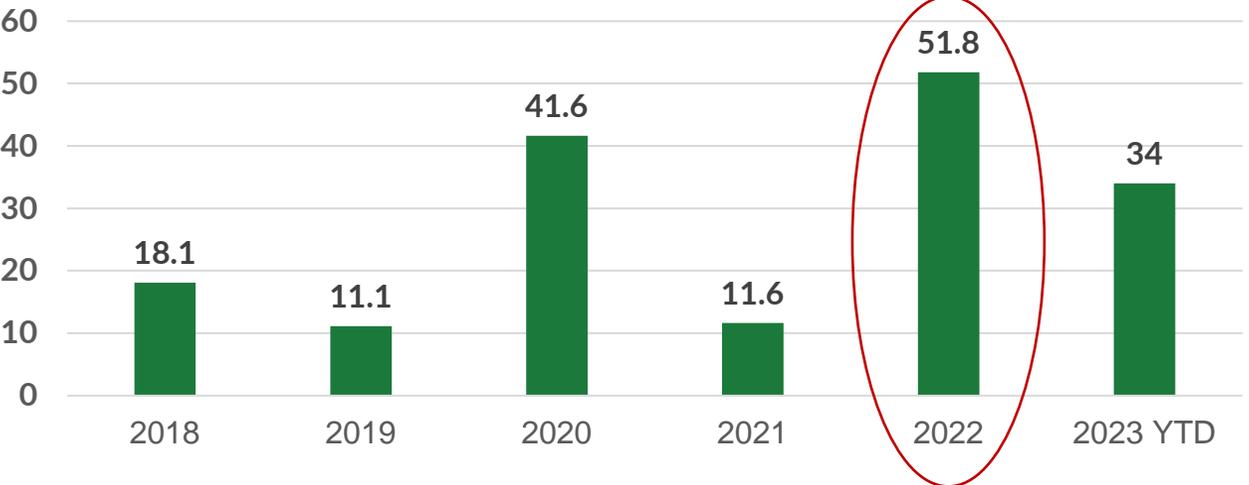
# EVERGREEN CAMPAIGN PROGRESS



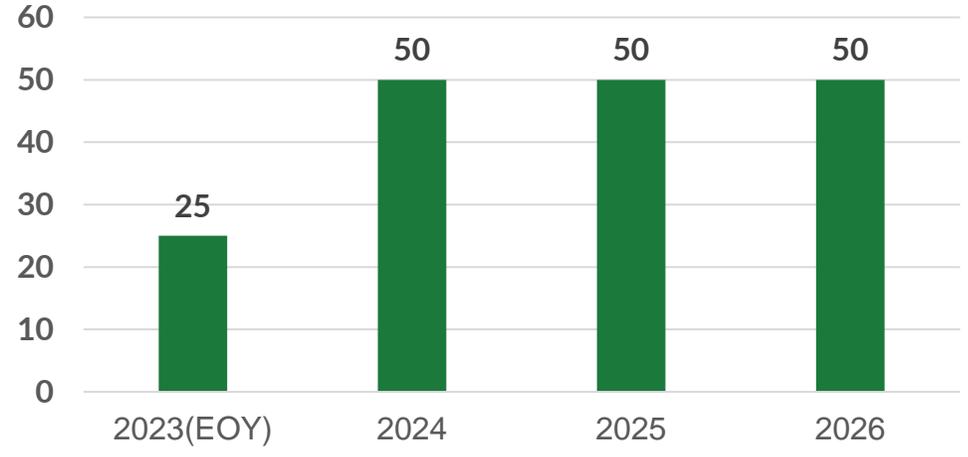
Total accumulated dollars raised (in millions)



Yearly dollars raised in millions

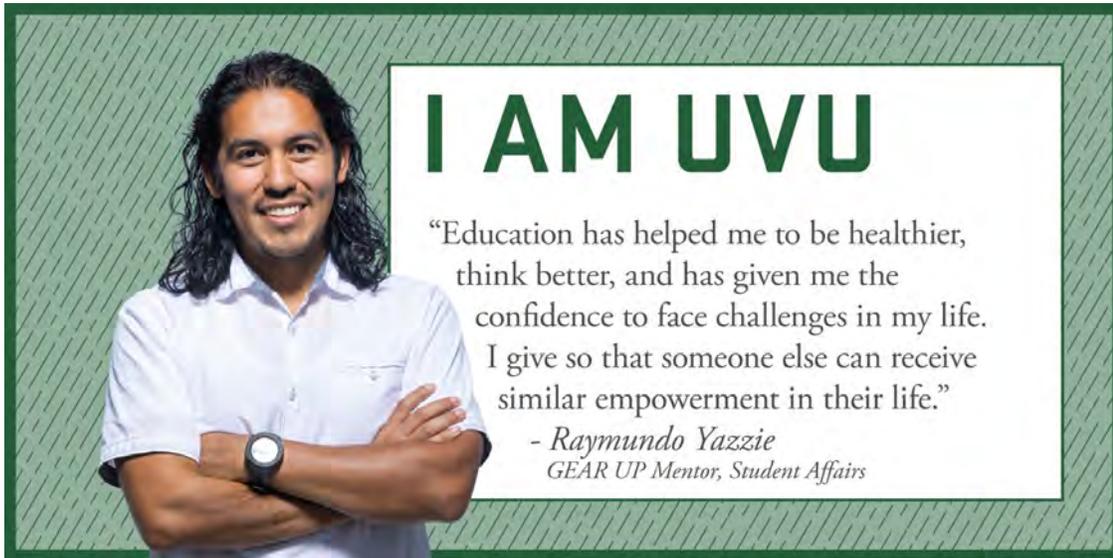


Goal of dollars raised in millions



# DEVELOPMENT

- Restarted annual giving team
- Kicked off **I Am UVU** student & employee giving campaign
- Created systematic way to highlight university areas
- Expanded development coverage



# DONOR ENGAGEMENT

- Student Interaction
- Campus Community
- Donor Recognition Events
- Fundraising Events



# DONOR SUPPORTED PROJECTS



UVU would not have these without private donations



# DATA, PROCESSING, AND ACCOUNTING



Identified new potential donors and current donors with increased capacity



Increased gift processing efficiency (48 hours)



Transition of giving pages to increase efficiency by eliminating manual step (600% INCREASE in recurring gifts)

# JOB SHADOW PROGRAM



Year 2 - 140 Alumni hosts | 225 students | up 30% from Year 1



"I had a really positive experience sharing what I could with the student. I think he really benefited from it and I felt good about potentially making a positive influence on the student's career path."

– Alum in the Insurance Industry



# PRIORITIES

UVU



# Our EverGREEN Campaign “Why”

## STUDENT SUCCESS

Transformational Educational Experience

### INCLUDE

Access & Opportunity  
Student Potential

### ENGAGE

Relevant Learning  
Engaging Environment

### ACHIEVE

Completion of a Credential  
Work & Life Readiness

Strengthen the foundation for ongoing giving, support, and engagement for UVU’s students, programs, and priorities

VISION 2030 – Engage C



# INSTITUTIONAL ADVANCEMENT PRIORITIES



## GARNER INTERNAL & EXTERNAL SUPPORT FOR EVERGREEN CAMPAIGN

### DONOR DATA & RESEARCH

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- Prospect Research
- Gift Processing
- Data Hygiene

### STRATEGIC ENGAGEMENT

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- Donor Relations
- Marketing & Communication
- Executive Events

### DONOR CULTIVATION

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- Annual Giving
- Alumni Relations
- Development

### GIFT SOLICITATION

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- First-Time Gifts
- Annual/Alumni Giving
- Major Gifts
- Principal & Planned
- Corporate Gifts
- Foundation Giving

### BOARD STEWARDSHIP

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- University Boards
- School/College Boards
- Student Support Boards

**IA PROCESS IMPROVEMENT** | Address critical process barriers throughout the donor engagement life cycle. Improve alignment of current resources to maximize clarity, effectiveness, and efficiency.



# INSTITUTIONAL ADVANCEMENT REQUESTS



**DONOR DATA & RESEARCH**

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Assistant Analyst for Data & Prospect Research  
Request #90

**STRATEGIC ENGAGEMENT**

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Strategic Engagement Coordinator  
Request #147

Assistant Director of Donor Relations (Corp Foundations)  
Request #156

**DONOR CULTIVATION**

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Assistant Director for Annual Giving  
Request #265

**GIFT SOLICITATION**

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Director of Development (DoD)  
Request #243

Associate Director of Development  
Request #249

**BOARD STEWARDSHIP**

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Assistant Director of Donor Relations (PES)  
Request #154

**IA PROCESS IMPROVEMENT** | Admin Support III, Request #81



# STAY TUNED - YOUNG LIVING ALUMNI CENTER



# THANK YOU

UVU

