

**DIVISION OF UNIVERSITY
ADVANCEMENT
ACCOMPLISHMENTS
SEPTEMBER 28, 2020**

COMMUNICATION & MARKETING

COVID-19 Communication: developed and coordinated content for the Fall 2020 Semester webpage, Student Repopulation Plan, led logistical support for in-person students, communication plans/updates to the campus, and organized content for the Fall 2020 Semester Campus Plan submitted to the Chancellor's Office for approval.

Spring 2020 Channel: produced and published the spring issue including pivoting midway to change and develop articles to reflect the pandemic and our shift to virtual instruction and campus operations.

Videos: filmed and produced all videos for virtual Convocation, welcome back video for students from Rich Yao, video message about the VPSA Student Advisory Board, Central Mall dedication, and other videos to support virtual services and operations across several areas of campus

Social Media: continued to share articles written for the #WeAreStillHere campaign, Student Success campaign, Alumni and Giving articles

Graphic Design: provided designs and production for Career Development & Alumni Engagement, as well as Development's annual fund and donor events

News Media: continued to promote faculty and University accomplishments to garner news media exposure

LiveHelp Chat: facilitated a campus-wide implementation for 13 additional areas across campus

Early Childhood Education Center: assisted with the writing and graphic design of the campus proposal

UNIVERSITY EVENTS

1. Developed and Implemented a Structure and Process for supporting Virtual Events

- a. Switched our operations to support virtual events; training with sister campus, developed a process for campus to request support, the team developed new skills to effectively produce virtual events
- b. Since August, our office has supported 20 virtual events

2. Successfully transitioned External Events to UAS

- a. Led and completed training on planning and facilitating external events and summer conferences
- b. Completed communication to annual external clients introducing them to UAS
- c. Currently developing processes between UAS and University Events to clearly identify roles and responsibilities

3. Chancellor Office Audit of Conferences & Events

- a. Almost complete with audit
- b. Identified processes/forms that need updating or adjustments
- c. Small number of findings related to C&E department (yay!)

4. Team members have allocated hours each week supporting other Departments or Divisions

- a. Academic Affairs: Jill Leafstedt's area with PDF remediation, Zoom support for Faculty, and soon will help with faculty communication
- b. Alumni Relations
- c. Office of the President
- d. Advancement Operations team with gift processing
- e. Facilities Services

CAREER DEVELOPMENT & ALUMNI ENGAGEMENT

- 1. Transitioned all career education presentations/workshops/materials to accessible virtual modes accessible 24-7 (e.g., recorded presentations, self-guided modules)**
 1. 100% increase in appointments since start of semester
 2. Virtual front desk
 3. New software and tools – Integrated Learning Pathways, Focus 2, and Quinncia
- 2. Enhancing Alumni Engagement through virtual means with a focus on Dolphin Mentorship Program via Dolphin Connect to establish a robust online mentoring and networking.**
 1. 800 Users
 2. Dolphin Pod Talk Series featuring alumni
 3. LinkedIn Learning – 6-month pilot for A&FA members and 2020 grads
- 3. Maintain partnerships with industry**
 1. Virtual Career Fair – Sept 30
 2. Virtual engagement – info sessions and tabling through Zoom and Social Media
 3. AWS Partnership - 23 completed CSUCI applicants for position
- 4. Enhanced collaborations with Academic and Student Affairs through virtual space**
 1. Presentations, partnerships and trainings
 2. Establishing central internship virtual hub

DEVELOPMENT

1. Fundraising Status - \$2,141,480 as of 8/31/2020 –GOAL: \$4M

1. Planned gifts, pledges, endowments, peer mentor ambassadors, scholarships
2. Adopt-a-Grad- as of 9/22/20. Total \$18,250

2. Virtual Development Events - Central Mall Dedication, Presidents Circle, and Foundation Webinars

3. CSUCIGiving–Facebook, LinkedIn and Instagram

4. Gravyty Implementation

5. Divisional Partnerships

1. Gift Processing – Clara, Hayley, Bruno, Ariana
2. Alumni Engagement – Mackenzie
3. Development Writing and Social Media – Joanna, Pam and Tom

FINANCIAL SERVICES

- **Foundation Annual Audited Financials** – Approved by Audit Committee Monday 9/14
 - Was clean audit, did a lot of house-keeping/clean-up this year (for example: Last FY we had 33 FDN funds in deficit, this FY I'm happy to report we only have 6 funds in deficit) (I'd like to thank Ritchie & Julia in support of this clean-up, (i.e: finding fund-owners, budget contacts, gift agreements).
Still some more work to be done, but made big strides this last FY.
- **Revised Gift and Endowment Management Fee Policy** - Approved by FDN Board Tuesday 9/15
 - Increase from 2% to 5% gift fee
 - Retaining investment earnings in UNR
 - Endowment Management Fee will remain 1.75% (special thanks to Ariana for reviewing the Endowment fund (1x) Agreements to see if any endowments were excl.)
- **Support y/e audit requests for Conferences & Events by providing JET support/financial data**
- **5Year Foundation Pro-forma (1st time for CSUCI FDN)**
- **5Year CDAE-CareerDev & Alumni Engagement Pro-forma (1st year we'll have TM905 budget to be uploaded to PSoft/DWH)**

ADMINISTRATIVE SUPPORT

- **Team Members have allocated hours each week to support other departments**
 - Commencement Committee Support
 - Gift Processing
 - On-Campus Mail Sorting & Check Depositing Support (once a week)
- **Worked with BFA to establish a division specific PMAF template in Adobe Sign**
- **Implemented the use of Planner on Microsoft Teams to assist with project mgmt.**

BUDGET UPDATE

Campus Budget Planning

FY 2020-2021

- **\$299 permanent reduction to the CSU budget**
- **\$5.1 million permanent reduction to CSUCI Budget**
- **\$1.9 million loss in tuition revenue (projected 5% enrollment drop)**

As of today, enrollment numbers are better than anticipated. Final numbers this Spring

- **\$12 million loss in auxiliary (housing, dining, parking) and other external revenue generating activities (conferences and events) as of June 30.**

Bridging FY 2020-2021 shortfall with one-time reserve funds and savings from the chill on hiring and travel as well as non-essential costs.

Campus Budget Planning

Fall 2020

- **Budgetary relief is temporary and will not resolve the campus' permanent \$5.1 million state appropriation reduction.**
- **As such, this fall the campus will focus its efforts on addressing the permanent \$5.1 million state appropriation shortfall**
- **Fiscal year 2021-22 planning cycle will commence in spring 2021 when we will have more information available to the campus including the Governor's January Budget and spring enrollment.**

University Advancement Budget Planning

- **Loss of revenue from external conferences and events has created a necessary reallocation of our Divisional resources to address the shortfall and support the staffing and operational needs of University Events.**
- **Additionally, resources will continue to be reallocated to support budget shortfalls associated with the merger of Career with Alumni Engagement programs.**
- **University Advancement has reallocated approximately 10% of its campus allocated state-side budget using resources that have been freed up as a result of salary savings from several vacant positions in UA and the freeze on travel.**
- **University Advancement's budget represents 4.5% of the total campus budget.**

University Advancement Budget Planning

- **The planning process for University Advancement's divisional budget will work within the timeline and parameters of the University budget planning process and will spend the fall focused on determining the Division's approach to its contribution towards the \$5.1 million campus shortfall.**
- **Questions, ideas, or feedback regarding University Advancement's budget or the Division's planning process are welcomed and encouraged. Should you have any of the above, please contact your supervisor to discuss.**
- **I encourage you to visit the University's [Budget and Planning](#) and the [Strategic Resource Planning Committee](#) websites for more information.**