



University Advancement

A One U Advancement Model
for Utah

CAD Meeting -- June 3, 2024

Overview

- Introductory Comments from Institutional Leadership
 - *President Randall; SVP & Provost Montoya; CEO and SVP Good*
- Comments from Advancement Leadership
 - *VP, Heidi Woodbury*

Utah - Current State

- Hybrid Advancement Model = mix of **234** positions:
 - **119** centralized in University Advancement
 - **69** other roles decentralized throughout institution
 - **33** embedded in U Health Advancement
 - **13** dual reports with select campus constituencies
- Total expenditures of nearly **\$32.4 Million** (*annually*) in support of advancement operations

Utah – External Assessment

Huron I GG+A has been studying the U's advancement operation and are delivering their complete findings later this month. Preliminarily, Martin Grenzebach is here to provide some comparative context using four slides from their early analysis...

COHORT Overview from CASE VSE (Mean, FY21-FY23)

	Total Private Support (Cash)	Institutional Expenditure	Total Private Support (Cash) as a % Institutional Expenditure	Endowment Market Value	Student Enrollment Headcount	Contactable Alumni
Berkeley	\$746.51M	\$2.98B	25.1%	\$7.05B	44,237	544,153
Florida	\$509.09M	\$3.49B	14.6%	\$2.33B	59,765	429,691
Indiana	\$473.82M	\$3.12B	15.2%	\$3.46B	91,228	866,138
Minnesota	\$449.92M	\$3.35B	13.4%	\$4.29B	67,307	591,059
Nebraska	\$293.59M	\$2.12B	13.9%	\$2.21B	49,888	411,749
Ohio State	\$409.96M	\$3.95B	10.4%	\$2.65B	67,175	646,201
UCLA	\$711.16M	\$6.58B	10.8%	\$7.19B	47,117	590,688
Washington	\$651.86M	\$4.39B	14.8%	\$4.78B	60,529	541,192
Wisconsin	\$357.90M	\$3.29B	10.9%	\$4.27B	47,631	449,272
Cohort Mean	\$511.53M	\$3.70B	14.3%	\$4.25B	59,431	563,349
Cohort Median	\$473.82M	\$3.35B	13.9%	\$4.27B	59,765	544,153
Utah	\$358.51M	\$2.55B	14.1%	\$1.43B	34,059	279,812
% Cohort Mean	70.1%	69.0%	-	33.7%	57.3%	49.7%

Sources: Council for Aid to Education (CAE) Voluntary Support of Education (VSE) Survey.

Notes: Institutional Expenditure includes all expenditure for instruction, research, public service, academic support, student services, institutional support, scholarships and fellowships, and operation and maintenance of physical plant; it excludes auxiliary enterprises, hospital services, and independent operations.

Total Private Support (cash) by Source (Mean, FY21-FY23)

	Alumni		Non-Alumni Individuals		Foundations		Corporations		Other Organizations		Total
	\$	%	\$	%	\$	%	\$	%	\$	%	
Berkeley	\$119.26M	16.0%	\$81.73M	10.9%	\$352.82M	47.3%	\$88.63M	11.9%	\$104.08M	13.9%	\$746.51M
Florida	\$83.55M	16.4%	\$76.28M	15.0%	\$70.81M	13.9%	\$105.17M	20.7%	\$173.28M	34.0%	\$509.09M
Indiana	\$81.20M	17.1%	\$29.33M	6.2%	\$89.60M	18.9%	\$94.91M	20.0%	\$178.76M	37.7%	\$473.82M
Minnesota	\$119.42M	26.5%	\$40.52M	9.0%	\$111.83M	24.9%	\$82.67M	18.4%	\$95.48M	21.2%	\$449.92M
Nebraska	\$53.34M	18.2%	\$34.02M	11.6%	\$116.49M	39.7%	\$39.38M	13.4%	\$50.36M	17.2%	\$293.59M
Ohio State	\$65.04M	15.9%	\$39.36M	9.6%	\$122.30M	29.8%	\$123.70M	30.2%	\$59.57M	14.5%	\$409.96M
UCLA	\$78.03M	11.0%	\$97.91M	13.8%	\$315.02M	44.3%	\$56.83M	8.0%	\$163.37M	23.0%	\$711.16M
Washington	\$105.40M	16.2%	\$87.59M	13.4%	\$242.15M	37.1%	\$74.94M	11.5%	\$141.78M	21.8%	\$651.86M
Wisconsin	\$86.80M	24.3%	\$67.52M	18.9%	\$101.10M	28.2%	\$56.50M	15.8%	\$45.99M	12.8%	\$357.90M
Cohort Mean	\$88.00M	17.9%	\$61.58M	12.0%	\$169.12M	31.6%	\$80.30M	16.6%	\$112.52M	21.8%	\$511.53M
Cohort Median	\$83.55M	16.4%	\$67.52M	11.6%	\$116.49M	29.8%	\$82.67M	15.8%	\$104.08M	21.2%	\$473.82M
Utah	\$33.44M	9.3%	\$29.63M	8.3%	\$121.14M	33.8%	\$73.14M	20.4%	\$101.16M	28.2%	\$358.51M
% Cohort Mean	38.0%	-	48.1%	-	71.6%	-	91.1%	-	89.9%	-	70.1%

Sources: Council for Aid to Education (CAE) Voluntary Support of Education (VSE) Survey.

Total Private Support (cash) by Designation (Mean, FY21-FY23)

	Current Operations (Unrestricted)		Current Operations (Restricted)		Property/Buildings/Equipment		Endowment (Unrestricted)		Endowment (Restricted)		Loan Funds		Deferred Gifts		Total
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	
Berkeley	\$7.17M	1.0%	\$562.05M	75.3%	\$24.97M	3.3%	\$0.88M	0.1%	\$147.18M	19.7%	\$0.00M	0.0%	\$4.26M	0.6%	\$746.51M
Florida	\$0.67M	0.1%	\$219.87M	43.2%	\$220.84M	43.4%	\$0.00M	0.0%	\$62.97M	12.4%	\$0.00M	0.0%	\$4.74M	0.9%	\$509.09M
Indiana	\$6.96M	1.5%	\$383.54M	80.9%	\$15.34M	3.2%	\$0.01M	0.0%	\$65.51M	13.8%	\$0.00M	0.0%	\$2.46M	0.5%	\$473.82M
Minnesota	\$20.22M	4.5%	\$253.89M	56.4%	\$38.08M	8.5%	\$1.01M	0.2%	\$119.67M	26.6%	\$0.00M	0.0%	\$17.04M	3.8%	\$449.92M
Nebraska	\$0.79M	0.3%	\$116.74M	39.8%	\$105.89M	36.1%	\$0.82M	0.3%	\$67.26M	22.9%	\$0.00M	0.0%	\$2.10M	0.7%	\$293.59M
Ohio State	\$6.03M	1.5%	\$292.44M	71.3%	\$40.91M	10.0%	\$0.00M	0.0%	\$68.51M	16.7%	\$0.00M	0.0%	\$2.07M	0.5%	\$409.96M
UCLA	\$2.98M	0.4%	\$454.47M	63.9%	\$5.96M	0.8%	\$2.90M	0.4%	\$235.53M	33.1%	\$0.28M	0.0%	\$9.04M	1.3%	\$711.16M
Washington	\$1.48M	0.2%	\$515.23M	79.0%	\$35.19M	5.4%	\$0.10M	0.0%	\$96.73M	14.8%	\$0.00M	0.0%	\$3.13M	0.5%	\$651.86M
Wisconsin	\$26.59M	7.4%	\$200.74M	56.1%	\$3.34M	0.9%	\$2.45M	0.7%	\$122.59M	34.3%	\$0.00M	0.0%	\$2.20M	0.6%	\$357.90M
Cohort Mean	\$8.10M	1.9%	\$333.22M	62.9%	\$54.50M	12.4%	\$0.91M	0.2%	\$109.55M	21.6%	\$0.03M	0.0%	\$5.23M	1.0%	\$511.53M
Cohort Median	\$6.03M	1.0%	\$292.44M	63.9%	\$35.19M	5.4%	\$0.82M	0.1%	\$96.73M	19.7%	\$0.00M	0.0%	\$3.13M	0.6%	\$473.82M
Utah	\$0.39M	0.1%	\$256.88M	71.7%	\$52.75M	14.7%	\$0.05M	0.0%	\$47.73M	13.3%	\$0.00M	0.0%	\$0.70M	0.2%	\$358.51M
% Cohort Mean	4.8%	-	77.1%	-	96.8%	-	5.9%	-	43.6%	-	0.0%	-	13.4%	-	70.1%

Sources: Council for Aid to Education (CAE) Voluntary Support of Education (VSE) Survey.

Private Research Grants as a % of Total Fundraising Progress (Mean, FY21-FY23)

	Private Research Grants	Private Research Grants % Total Fundraising Progress (Excluding Bequest Intentions)
Cohort Mean	\$106.42M	19.2%
Cohort Median	\$93.08M	18.3%
Utah	\$59.78M	14.6%
% Cohort Mean	56.2%	-

Source: Self-Reported to Huron | GG+A Global Philanthropy

Notes: Per Council for Advancement and Support of Education (CASE) management and reporting standards/guidelines, Private Research Grants are defined as contributions received by an institution for either unrestricted or restricted use in the furtherance (of research) at the institution that typically comes from a corporation, foundation, or other organization, rather than an individual. An institution may determine that what a donor calls a grant is, for internal recordkeeping, a gift.

Utah – Future State: A One U Advancement Model

Incorporates the salaries and support of the full team of constituent-based staff who predominantly focus on advancement into **one** University Advancement operation.

Key highlights:

- Comprehensive affiliation of up to 115 UHealth & other decentralized staff w/ 119 centrally organized University Advancement staff
- \$17.4 Million in annual expenditures to be provided by areas but administered by University Advancement *and* deans, directors, and others
- Staff remain physically located within their areas, reporting jointly to combo of dean/director *and* University Advancement (*as HR home*)
- Annual goal setting, performance planning/review, etc. done collaboratively with deans/directors and U Advancement
- Commencing migration to this model July 1, 2024

Clarifications, Questions, and Observations