Unit Presentation Requirements

The following items are required materials for the unit presentations. The units presented to the committee and questions were encouraged. The units provided additional or supplemental information as deemed appropriate.

- General Information to “Tell Your Story”
  - How unit aligns to University goals
- Organizational Chart and Position / Staffing Information
- Opportunities and Strengths
- What is going well? What requires improvement?
- Key Performance Indicators, Benchmarks, and Surveys
- Five Year Financial Pro-forma
- Reserves and Balances

Goals and Initiatives

At the core of the University of Texas at San Antonio (UTSA), the Advancement and Alumni Engagement (A&AE) team plays a pivotal role in forging strong partnerships with various university divisions. Their mission is centered on fundraising, nurturing positive relationships, and sharing the inspiring story of UTSA, all while fostering opportunities for donor, alumni, and stakeholder engagement.

A&AE brings immense value to the university. The key goals and initiatives are aligned with the university's mission and strategic destinations, as demonstrated in their ongoing Be Bold Campaign. The campaign focuses on three core areas: Student Success, which aims to create scholarship, experiential, and life-changing education opportunities; Research Excellence, which aspires to attract and retain world-class faculty, endow fellowship opportunities, and maintain UTSA's status as a Tier One research university; and Strategic Growth, which seeks to enhance instruction and cultivate a thriving community environment.

The unit's recent milestones include surges in endowments, constituent records, and total gifts. Their well-articulated goals and initiatives are backed by a well-organized, metrics-driven operation. Utilizing a case load model, they maintain a standard staff-to-donor ratio, ensuring personalized engagement while reducing burnout among team members.

Thanks to their diligent long-term planning, the AAE unit is well-prepared to navigate current and future campaigns, staffing needs, and projected expenses, ultimately contributing to UTSA's continued success.
**Organization**

In his presentation, Mr. Miller-Lugo provided a comprehensive overview of the A&AE unit, highlighting its organization and the various roles within it. He emphasized the importance of the chief of staff position, who acts as a liaison with executive offices, as well as the data analytics staff members. Additionally, he pointed out that the unit has a small development and advancement communications staff, distinct from the university's marketing and communications staff. Mr. Miller-Lugo also mentioned that all unit-based advancement staff report back to central university advancement to ensure a coordinated effort in gift solicitation.

The organization chart showcased the different groups that make up the unit, including the number of positions and any vacancies within the sub-units. While the roles of each unit were not explicitly discussed, one can infer their functions from the detailed descriptions. The unit is almost fully staffed, but there is a need to examine the structure of the alumni association to provide more personalized services for the alumni base.

The financial information presented offered valuable insights into benchmarking against peer institutions, historical data, and future projections of gift solicitation and endowment growth. It revealed that one full-time employee (FTE) raises $500K on average, while the cost is $0.25 per dollar raised. This information is useful for understanding staffing levels and resource allocation. Reserves are employed for various operational needs, such as staff retention, consulting, or budget shortfalls. However, more financial resources are required to cultivate long-term donor relations across the state, enabling staff to travel outside San Antonio more frequently to engage with donors who possess higher giving capacities.

**Operations**

A&AE plays a crucial role in supporting the university's strategic plan by aligning their divisional and campaign goals with every strategic destination. Leadership within the office demonstrates a strong commitment to utilizing the strategic plan when formulating fundraising strategies. By working closely with academics and auxiliaries, they successfully determine campaign destinations that align with the university's broader vision.

A clear strategy is in place to ensure efficiency in cultivating and retaining relationships with alumni and donors. This is further emphasized by the inclusive approach to alumni engagement communication, which encompasses all alumni regardless of their membership status in the Alumni Association.

A&AE presented a well-structured organizational chart that highlights the need for expansion positions and the urgency to fill several open positions. Despite facing staffing and funding shortages, the office has managed to excel in their endeavors, showcasing their resilience and adaptability.

In summary, A&AE is deeply committed to supporting the university's strategic plan by fostering strong relationships with alumni and donors and aligning their goals with the institution's strategic destinations. Through collaborative efforts with various academic and auxiliary departments, they craft effective fundraising strategies that resonate with the university's overarching vision. Their dedication to maintaining robust connections with alumni, coupled
with their ability to thrive amid staffing and funding challenges, makes this unit an indispensable part of the university's ongoing success.

**Finance**
The A&AE presenters deserve commendation for their exceptional, informative, and efficient presentation. Their approach should be shared with other unit leads as an exemplary model. The financial sub-committee found the report transparent and easy to understand, reflecting the presenters' ability to communicate complex information effectively.

The team's well-articulated and reasonable request for additional investiture to hire more staff garnered the support of the sub-committee, which believes that the unit should receive the requested funding. Although there was a minor concern regarding the diminishing reserves for the unit, the team provided a rationale for additional support. Consequently, the sub-committee recommends addressing this request as well.

While not specifically directed at the presenting body, the group suggested that university leadership consider reinvesting a small percentage of the gifts received back into the unit organizing the fundraising (A&AE). This would ensure the sustainability and growth of the unit, allowing it to further contribute to the university's success.

Lastly, the comparative assessment of Key Performance Indicators (KPIs) against peer-universities at different levels was outstanding. This analysis demonstrates the A&AE unit's commitment to benchmarking their progress and striving for continuous improvement.

**Assessment**
AAE delivered a clearly articulated, metric-focused presentation that provided the committee with a comprehensive understanding of the A&AE division's complexity and breadth without overwhelming them with excessive detail. The committee commends A&AE for their efficient yet thorough presentation.

Further, the committee applauds A&AE for their effective use of data informatics to analyze fundraising efforts and the average development officer's portfolio and activities, both of which have seen exponential growth since the current campaign's launch.

The KPIs shared by A&AE offered insightful comparisons to peer institutions in Texas, among Hispanic Serving Universities, and nationally. A&AE regularly benchmarks their fundraising performance against peer/aspirant institutions, and their resource planning aligns well with their mission and goals. The amount they aim to raise for additional personnel demonstrates their deep insight and connection to their objectives.

It was noted in A&AE's presentation that they are understaffed based on national data. With 89 full-time employees (FTE), they should ideally have 100 FTE. The standard is $0.25 per dollar raised, while UTSA currently stands at $0.14. The data provided reveals that A&AE is significantly underfunded compared to their peer and aspirant institutions and struggling due to UTSA's rapid growth. The committee firmly believes that A&AE requires additional personnel and financial resources to maximize their fundraising and outreach efforts.
There were very few weaknesses in A&AE's presentation. It was noted that the University's strategies to align with the Alumni Association or gather direct feedback from alumni on their perceptions and experiences with the University could be improved.

The committee was presented with compelling evidence that A&AE's core values are clearly stated and that their mission aligns with the University's objectives for student success, strategic growth, and innovative excellence. A&AE demonstrated their commitment to building and enhancing relationships with alumni and potential donors, as well as managing large campaigns to generate funding for the university.
OUR MISSION

• Supports UTSA through successful **fundraising and alumni engagement**, while partnering with other university divisions to strengthen the university’s reputation among key stakeholder groups.

• Builds and maintains **positive relationships** with individual donors, corporations, foundations, civic and non-profit organizations, various institutions and alumni to create philanthropic and engagement opportunities.

• Committed to telling the UTSA story while creating opportunities for donors, alumni and other supporters to be part of the university’s **bold journey** toward its strategic destinations.
OUR PRIORITIES

VPAAE
Be Bold
Campaign

Student Success
UTSA remains focused on creating opportunities for scholarships, experiential learning, and life-changing education.

Research Excellence
UTSA strives to attract and retain world-class faculty, endow fellowship opportunities, and remain a Tier One research university.

Strategic Growth
UTSA will realize its full potential by enhancing its infrastructure and creating an environment for our community to thrive in.
OUR ORGANIZATION

Karl Miller-Lugo
Vice President for Advancement & Alumni Engagement

Cheri Wiese
Chief of Staff

Gigi Hobgood
Administrative Services Officer I

Joy Magatagan
Senior Office Assistant

David Onion
Senior Associate Vice President for Development
- College/unit Fundraising
- Annual Giving
- Development Communications
- Gift Planning

33 Positions
3 Vacancies

Russell Wagner
Assistant Vice President for Alumni Engagement & Executive Director of the UTSA Alumni Association
- Alumni Engagement Programs & Events
- Alumni Association Board Management & Finance
- AA Membership
- Sponsorships
- AA Scholarships & Endowments

10 Positions

Rebecca Anderson
Associate Vice President for Operations & Advancement Services
- Finance & Operations
- Talent Management
- Data Management & Strategic Analytics
- Prospect Management & Research
- Endowment Compliance & Gift Administration

28.5 Positions
1 Vacancy

Shawn Farrell
Assistant Vice President for Corporate & Foundation Engagement
- Corporate Engagement
- Foundation Relations
- Strategic Partnerships
- Liaison to Office of Research, Economic Development, and Knowledge Enterprise

5 Positions
1 Vacancy

Cece Griffin
Assistant Vice President for Leadership Strategy
- Campaign Leadership Council
- Development Board
- Donor Stewardship & Events
- Donor Reporting – Scholarships/Endowments

85.5 Positions
5 Vacancies
HISTORICAL AND FUTURE FUNDRAISING PRODUCTIVITY

"We Are UTSA" Inaugural Capital Campaign

Silent Phase FY17-FY22

Public Phase FY23-27

$26M Average

$48M Average

$107
INAUGURAL CAMPAIGN & CURRENT CAMPAIGN COMPARISON

INAGURAL CAMPAIGN

- $328 Million Raised to Date
- 66% Progress to Goal of $500M

- 122,269 Gifts
- 40,988 Donors
- $271M Endowment*

CURRENT CAMPAIGN

- $99.7 Million Raised in Silent Phase
- 57% Progress to Goal of $175M

- 39,635 Gifts
- 14,656 Donors
- $89.5M Endowment Value*
ENDOWMENT AMOUNT & VALUE GROWTH

97% Increase in Total Endowments

<table>
<thead>
<tr>
<th>Academic Purpose Description</th>
<th>Number of Endowments</th>
<th>Book Value</th>
<th>Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Chair</td>
<td>8</td>
<td>$15,594,322</td>
<td>$22,195,854</td>
</tr>
<tr>
<td>Distinguished Chair</td>
<td>13</td>
<td>$11,614,317</td>
<td>$21,119,641</td>
</tr>
<tr>
<td>Chair</td>
<td>18</td>
<td>$14,120,278</td>
<td>$19,886,423</td>
</tr>
<tr>
<td>Distinguished Professorship</td>
<td>16</td>
<td>$6,975,598</td>
<td>$10,565,178</td>
</tr>
<tr>
<td>Professorship</td>
<td>26</td>
<td>$5,844,770</td>
<td>$8,816,276</td>
</tr>
<tr>
<td>Faculty Fellowship</td>
<td>6</td>
<td>$867,271</td>
<td>$897,054</td>
</tr>
<tr>
<td>Scholarship</td>
<td>351</td>
<td>$65,260,542</td>
<td>$91,744,471</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>114</td>
<td>$76,453,539</td>
<td>$81,295,101</td>
</tr>
<tr>
<td>Graduate Fellowship</td>
<td>19</td>
<td>$11,507,428</td>
<td>$14,584,082</td>
</tr>
<tr>
<td>Totals</td>
<td>571</td>
<td>$208,238,065</td>
<td>$271,104,080</td>
</tr>
</tbody>
</table>

"We Are UTSA" Inaugural Capital Campaign
"Be Bold" Capital Campaign

Endowment Book Value
Endowment Market Value
CONSTITUENT RECORD GROWTH

238K Constituent Records Currently Maintained

Data Maintained per Record
- Primary Bio info
- Contact info & Addresses
- Salutations
- Relationships/Connections/Affiliations
- Employment Information
- Campaigns, Appeals and Solicitations
- Historical Notes
- Contact Actions
- Media Mentions
- Gift Records
- Special Groups
- Contact reports
- Honor/Memorial preferences
- Volunteerism
- Prospect Capacity and Ratings
- Membership status
- Special Event invites, purchases, RSVPs and participations
- Online activity
- Social Media Engagement
Over 16 Million Emails Projected for FY23

Types of Broadcast Emails Sent
- Segmented Fundraising Appeals
- Giving Day Campaign Solicitations
- Event Invitations
  - Football Tailgate
  - Gala
  - Diploma Dash
  - VIP Events
  - Ribbon Cuttings
  - State of the University
  - Professional Development Seminars
  - Networking Opportunities
- Membership Campaigns
  - New Membership
  - Renewals
  - Rejoins
- College Newsletters
- Urgent News
- Career Center Project Offerings
- Special Announcements
476K Gift Records Currently Maintained

Types of Gifts Maintained
- Pledges
- Pledge Payments
- Cash
- Credit Card
- Crypto Currency
- Stock
- Property
- In-Kind Goods and Services
- Planned Gifts
- Donor Advised Funds
- Revocable Living Trusts
- IRA Gifts
- Retained Life Estates
- Matching Gifts
- Charitable Living Trusts
- Memorial Gifts
- Recurring Gifts
- Membership Dues
- Football Season Ticket Packages
- Event Registrations
- Merchandise Sales
- Payroll Deductions
### GIFT PROCESSING

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th># of Gift*</th>
<th>Average # of Full Time</th>
<th>Time Available to Process Each Gift (in minutes)</th>
<th>Volume of Gifts Handled Per Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY19</td>
<td>35,123</td>
<td>3</td>
<td>3.4</td>
<td>11,708</td>
</tr>
<tr>
<td>FY20</td>
<td>21,520</td>
<td>2.5</td>
<td>5.6</td>
<td>8,608</td>
</tr>
<tr>
<td>FY21</td>
<td>20,639</td>
<td>2.5</td>
<td>5.8</td>
<td>8,256</td>
</tr>
<tr>
<td>FY22</td>
<td>31,204</td>
<td>2.5</td>
<td>3.8</td>
<td>12,482</td>
</tr>
</tbody>
</table>

**Average Time Per Gift Needed (in minutes)**: 4.66

**Average Volume of Gifts Handled Per Staff Member Annually**: 10,263

Gift Processing = Constituent updates, data entry, research, deposits and reporting

*Gift = Cash, Pay-Cash, Pledges, Gift-in-Kind, Stock/Property and Planned Gift

**Does not include Alumni memberships, events and reconciliation.
NEW PORTFOLIO ASSIGNMENTS

412%
Growth Since Campaign Launch

102
Average Development Officer Portfolio Size

337%
Annual Increase in Bio Research Projects (Bio Briefs)

3,131
Currently Assigned Prospects

6,485
Currently Assigned Prospects

9,616
Currently Assigned Prospects
CAMPAIGN DONOR PYRAMID

2%
Major Giving Level
740 Donors
$25k+

13%
Mid Giving Level
4,519 Donors
$1k-$24,999

85%
Annual Giving Level
30,244 Donors
< $1k

<table>
<thead>
<tr>
<th>&gt;=</th>
<th>&lt;=</th>
<th>Donor Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>$25,000,000</td>
<td>$24,999,999</td>
<td>6</td>
</tr>
<tr>
<td>$10,000,000</td>
<td>$9,999,999</td>
<td>4</td>
</tr>
<tr>
<td>$5,000,000</td>
<td>$4,999,999</td>
<td>8</td>
</tr>
<tr>
<td>$1,000,000</td>
<td>$999,999</td>
<td>45</td>
</tr>
<tr>
<td>$250,000</td>
<td>$999,999</td>
<td>105</td>
</tr>
<tr>
<td>$100,000</td>
<td>$249,999</td>
<td>128</td>
</tr>
<tr>
<td>$50,000</td>
<td>$99,999</td>
<td>197</td>
</tr>
<tr>
<td>$25,000</td>
<td>$49,999</td>
<td>246</td>
</tr>
<tr>
<td>$10,000</td>
<td>$24,999</td>
<td>597</td>
</tr>
<tr>
<td>$5,000</td>
<td>$9,999</td>
<td>660</td>
</tr>
<tr>
<td>$2,500</td>
<td>$4,999</td>
<td>1,066</td>
</tr>
<tr>
<td>$1,000</td>
<td>$2,499</td>
<td>2,196</td>
</tr>
<tr>
<td>$500</td>
<td>$999</td>
<td>2,111</td>
</tr>
<tr>
<td>$100</td>
<td>$499</td>
<td>8,446</td>
</tr>
<tr>
<td>$100</td>
<td>$100</td>
<td>19,687</td>
</tr>
</tbody>
</table>
CAMPAIGN DONORS AND ALUMNI BY AGE

- **8 Years**
  - Younger than the Average We Are UTSA Donor

- **19,242**
  - 1st Time Donors

- **58%**
  - Donor Diversity

- **42**
  - Average Age

- **41**
  - Average Age

- **49**
  - Average Age
KPI PEER BENCHMARKING – OVERALL GIVING VSE GRAND TOTALS - FY22
KPI PEER BENCHMARKING – ALUMNI PARTICIPATION - FY21

Peer Models of Excellence

University of Central Florida
Florida International University
University of Maryland-Baltimore County
Arizona State University
George Mason University
University of California-Santa Cruz
University of California-Irvine
University of Texas at San Antonio
University of California-Riverside
Georgia State University
Portland State University

University of Texas at Austin
Texas Tech University
University of Arizona
University of Central Florida
Florida International University
University of Houston
Arizona State University
University of California-Santa Cruz
University of Texas at El Paso
University of Nevada-Las Vegas
University of California-Irvine
University of Texas at San Antonio
University of North Texas
University of New Mexico
University of California-Santa Barbara
University of Illinois at Chicago
University of California-Riverside
University of Texas at Arlington

University of Texas-Rio Grande Valley
### KPI Peer Benchmarking – AEM - UT System - FY22

<table>
<thead>
<tr>
<th>Category</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer</td>
<td>0.0%</td>
</tr>
<tr>
<td>Experiential</td>
<td>5.0%</td>
</tr>
<tr>
<td>Communication</td>
<td>15.0%</td>
</tr>
<tr>
<td>Philanthropic</td>
<td>10.0%</td>
</tr>
<tr>
<td>Any Mode</td>
<td>20.0%</td>
</tr>
</tbody>
</table>

#### UTSA Rank
- **2nd UTSA Rank**
- **5 out of 12 Reported**
- **1st UT**
- **2nd UTSA**
- **Average**
- **3rd UTA**
- **4th UTEP**
- **5th UT Health Houston**
KPI PEER BENCHMARKING – AEM – HSRU PEERS - FY22

2022

- Volunteer: 5th UTSA Rank
- Experiential: 4th UTSA Rank
- Communication: 2nd UTSA Rank
- Philanthropic: 5th UTSA Rank
- Any Mode: 4th UTSA Rank

11 out of 17 Reported
Focused on major gift volume, not just mega-gifts

Built a broad base of leadership annual donors ($1K-$24.9K gifts), creating a pipeline of future major gift supporters

Prioritized investing in staff for development roles, including major gifts, planned giving, and corporate/foundation relations

Invested in strategic operational support, especially in advancement services

Advancement leaders must constantly find new ways to grow fundraising revenues and ROI.

Using proprietary ROI benchmarking data from over 150 institutions in the U.S. and Canada, EAB analyzed the investments, staffing and fundraising strategies most closely tied to top performing advancement institutions.

Their research found that the institutions with the highest ROI performed the following:
BUDGET PLANNING PRIORITIES & FRAMEWORK

Staying True to our Mission

- Ensure budget priorities support the success of UTSA’s $.5 billion comprehensive campaign which supports all three destinations

Essential to Our Core Services

- Recruit and retain high quality staff through strategic talent management and workforce planning
- Maintain a robust operations enterprise to support all aspects of Advancement and Alumni Engagement to ensure the continued innovation, growth and success of our organization.

Continuous Improvement and cost containment

- Regularly explore new models and technology in service delivery
- Regularly review best practices, internal controls, policies and procedures to ensure efficiencies
## BE BOLD CAMPAIGN STAFF GROWTH

<table>
<thead>
<tr>
<th>BE BOLD CAMPAIGN</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL STAFF</td>
<td>79</td>
<td>76</td>
<td>75</td>
<td>81</td>
<td>85.5</td>
</tr>
</tbody>
</table>

Standard Average - 1 FTE needed per $500K raised = 100 FTE’s to raise $50M annually

We are UTSA Campaign 89 FTE’s
BE BOLD CAMPAIGN BUDGET GROWTH

38% INCREASE

Standard Average - It costs .25 cents per dollar raised = $12.5M budget to raise $50M annually
Through our internal strategic budget review, forecasting and planning process, reserves are allocated to fund:

- Campaign Support
- Database Software/Technology
- Staff Retention Strategies
- Professional Development
- Fund Departmental One-time Requests for New Programming/Strategic Initiatives
- New Employee Start Up Costs
- Outsourcing Services
- Consultants
- Fund Budget Shortfalls as needed on a Case-by-Case Basis

### Reserve Summary

<table>
<thead>
<tr>
<th>Fiscal year</th>
<th>Starting Balance*</th>
<th>Utilization</th>
<th>Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>$1,415,473</td>
<td>$569,360</td>
<td>$846,113</td>
</tr>
<tr>
<td>2020</td>
<td>$947,764</td>
<td>$709,490</td>
<td>$238,274</td>
</tr>
<tr>
<td>2021</td>
<td>$387,684</td>
<td>$0</td>
<td>$387,684</td>
</tr>
<tr>
<td>2022</td>
<td>$558,103</td>
<td>$295,024</td>
<td>$263,079</td>
</tr>
<tr>
<td>2023</td>
<td>$273,079</td>
<td>$187,649</td>
<td>$85,430</td>
</tr>
</tbody>
</table>

*Includes department balance forwards over $5k per internal lapse policy
FY 23-28 STRATEGIC PRIORITIES BASED ON CAMPAIGN FEASIBILITY STUDY RECOMMENDATIONS

- FINALIZING PLACEMENT OF CDOS IN ALL COLLEGES
- RESOURCES NECESSARY TO CAPTURE FUNDRAISING POTENTIAL
- ADEQUATE ADVANCEMENT SERVICES AND SUPPORT FUNCTIONS
- CONTINUOUS TRAINING AND PROFESSIONAL DEVELOPMENT SUPPORT AND RESOURCES
FY 23-28 STRATEGIC PRIORITIES BASED ON CAMPAIGN FEASIBILITY STUDY RECOMMENDATIONS

Enhancing our Ability to Capture Regional Potential
Austin, Dallas, Houston, RGV, South Texas, Colorado, California, Florida, Virginia

Resources to Cultivate Relationships with ~5,000 constituents with $1M+ capacity

Resources for Discovery on ~6,250 constituents with connection and capacity over $25K
FY 23-28 STRATEGIC PRIORITIES BASED ON CAMPAIGN FEASIBILITY STUDY RECOMMENDATIONS

IMPLEMENTING RECOMMENDATIONS OF THE ALUMNI ASSESSMENT

TRANSITION OF ALUMNI ASSOCIATION FROM DUES TO FREE MEMBERSHIP MODEL

RESOURCES TO PROVIDE AFFINITY-BASED, PERSONALIZED ALUMNI RELATIONS ENGAGEMENT FOR COLLEGES, SCHOOLS, AND UNITS
| Summary | 5 Year Financial Proforma
As of February 28th (End Quarter) |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FY 2021 Actuals</td>
</tr>
<tr>
<td><strong>ASSUMPTIONS</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>RESOURCES</strong></td>
<td></td>
</tr>
<tr>
<td>UTSA Reimbursements to Other University</td>
<td></td>
</tr>
<tr>
<td>Student Fees &amp; Royalties</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>FINANCIALS</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Ratio: Net Income to Debt Service</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Reserves as a Percentage of Expense &amp; Operating Transfers</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Lapsed Amount Added to / Removed from Reserve Funds</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total Year End Balance (Deficit) (O+P)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total Transfers to Cover Shortfall</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transfers In - From HEERF</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transfers To (From) Dept, EGV001</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transfers To (From) Business Affairs UNW001 INT003</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Operating Transfers - To (From) Other Units</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total Expenses Before Transfers (F+G+H+I)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transfers Out - Debt Service</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total Direct Expenses - Personnel</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Other Revenue - State Allocations (E&amp;G)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Student Fee and Other Revenue Sources</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5 Year Financial Proforma</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2021</strong></td>
<td>$5,175,580</td>
</tr>
<tr>
<td><strong>FY 2022</strong></td>
<td>$5,649,098</td>
</tr>
<tr>
<td><strong>FY 2023</strong></td>
<td>$7,411,613</td>
</tr>
<tr>
<td><strong>FY 2024</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2025</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2026</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2027</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2028</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2029</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2030</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Projection</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2021</strong></td>
<td>$4,147,125</td>
</tr>
<tr>
<td><strong>FY 2022</strong></td>
<td>$3,435,817</td>
</tr>
<tr>
<td><strong>FY 2024</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2025</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2026</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2027</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2028</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2029</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2030</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Projection</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2021</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2022</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2023</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2024</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2025</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2026</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2027</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2028</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2029</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FY 2030</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Projection</strong></td>
<td></td>
</tr>
</tbody>
</table>
## Operational Review Packet

**Name of Unit:** Advancement and Alumni Engagement  
**College / Division:**  
**Contact Name:** Rebecca Anderson  
**Phone/Email:** Rebecca.Anderson@utsa.edu

### Type of Unit:
- Academic Support Unit [ ]
- Administrative Support Unit [X]
- Auxiliary Unit [ ]

### REQUIRED DOCUMENTS:

**FIRST SUBMITTAL -**
- **General Information to "Tell Your Story"** [X]
  - Explain "who you are", "what you do", "how you do it", and "how it aligns to the destination & strategic initiatives."
- **Organizational Chart and Position Data** [X]
  - Provide snapshot of functional organization chart with FTE information, identify potential or planned staffing or organization changes

**SECOND SUBMITTAL -**
- **Challenges / Opportunities** [X]
  - Explain critical issues and identify potential opportunities and efficiencies; discuss benefits to students and campus
- **Key Performance Indicators / Benchmarks / Comparisons** [X]
  - Provide operational and efficiency metrics along with benchmarks or comparisons; Explain service delivery model framework, including service expectations and aspirations
- **Budget / Actual Financial Data** [X]
  - 5-Year Proforma; Provide actuals for prior 2 years, current year projection, and 2 additional future year projections [Note: Template will be provided]
- **Explanation of Reserves** [X]
  - Provide details of current balances and practice of adding to reserves each year; Provide 3 years of prior growth and current projection.

### Supplemental Information (Optional):

- **Customer Surveys**
  - Summary of current year results, along with changes over time
- **External Review Data**
  - Summary of results from an external source, such as related to accreditation/assessment
- **Trending Data**
  - Trend data showing how an operation has changed over time, explaining conclusions

### Describe Any Additional Information Provided (Optional):

### Routing and Approvals:

- **Unit Director / AVP Signature:** Rebecca Anderson  
  **Printed Name:** Rebecca Anderson  
  **Date:** 3/10/2023
- **Dean / VP Approval Signature:**  
  **Printed Name:**  
  **Date:**

> Include this cover sheet with the packet submitted to Operational Review Governance Committee