WELCOME!
2020 UC ANR Strategic Plan Input Session:

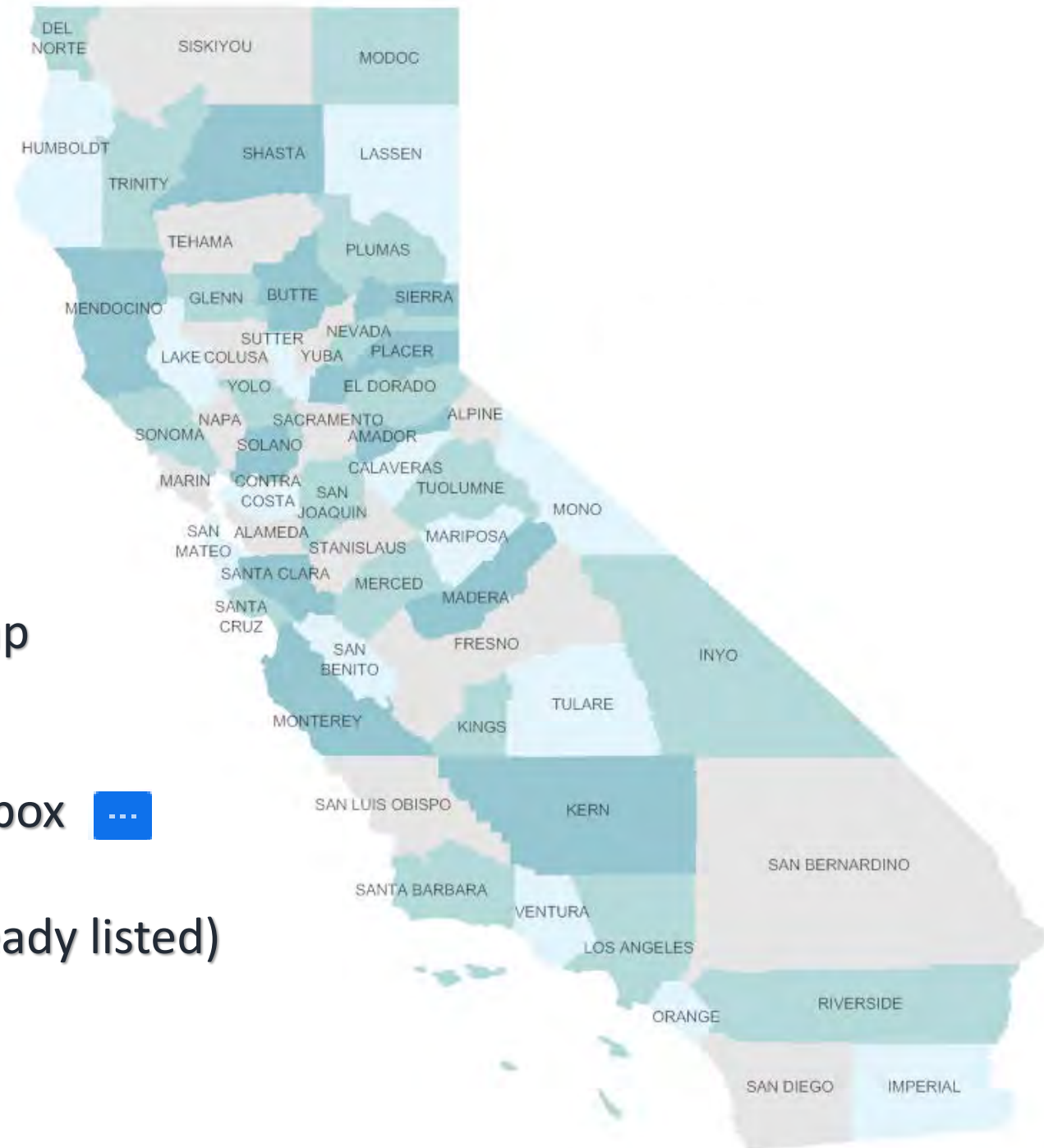While we wait for everyone to join…

1. **Show us your location!**
   - Under View Options, click "Annotate"
   - Select "Stamp" ❤ and add it to the map

2. **Check Your Zoom Name**
   - On your square-right corner-click blue box
   - Select "Rename"
   - Enter full first and last name (if not already listed)

UNIVERSITY OF CALIFORNIA
Agriculture and Natural Resources

Agenda

TIME	TOPIC
10:00 – 10:10	Agenda & Intro 10 min
10:10 – 10:20	Strategic Plan Overview 10 min
10:20 – 10:55	Increasing Program Resources 35 min ▪ Challenges ▪ 2016-2020 Accomplishments ▪ 2020-2025 Proposed Actions ▪ Clarifying Q&A (10 min)
10:55 – 11:00	Break 5 min
11:00 – 11:35	Breakout Discussion 35 min ▪ Anything missing? What other ideas do you have? ▪ How can we collectively contribute to shared success?
11:35 – 11:55	Summary Comments / Q&A 20 min
11:55 – 12:00	Close 5 min

Today's Desired Outcomes

1. Shared understanding of UC ANR's current challenges and proposed actions to address these challenges

2. Gain input on ways to strengthen/improve UC ANR to inform UC ANR's 2020-2025 strategic plan goals

Increasing Employee Engagement

Areas of Opportunity from ANR@Work Survey

➢   I have a voice to provide my ideas and suggestions on how to improve UC ANR

➢   I feel senior leaders have adequately communicated long-range goals and strategic direction

➢   I feel valued as a member of the UC ANR community

Strategic Plan Stakeholder Engagement

2020-2025 Plan Refresh Engagement
January Retreat with 29 Systemwide Stakeholders + Goal Owners
Stakeholder **Group Input Sessions** **May – August** • Governing Council 5/12, 6/17, 8/5 (Goal 1 especially) • VP Council (includes Statewide Program and Institute Directors) 6/29 • Program Council 7/8 • PAC 8/30 • DEI Alliance • Academic Assembly Council Executive Committee
7/16 - **UC ANR Town Hall** – Overview Strat Plan & Opportunities for Input

4 Input Sessions for all UC ANR Employees (2 hrs each)
    8/4 (10-12) - Increasing Program Resources (Goals 9, 10, 11, 12)
    8/11 (1-3) - Strengthening Partnerships (Goals 1, 3, 4)
    8/18 (10-12) - Fostering a Positive Work Environment (Goals 6, 7, 8)
    8/25 (1-3) - Expanding Virtual Reach (Goals 2 and 5)

Goal Owners Seek Input from Staff/Colleagues during Goal Development
Draft Plan to be Circulated for Feedback in **Late Sept** • CDs, REC Directors, SWP/I Leaders, and Administrative Directors (engage their own teams and submit one response per location) • Governing Council • PAC
Post-Completion Communication/Engagement   **TBD**

UC ANR Strategic Plan Overview

Kathy Eftekhari, Chief of Staff

Plan Components & Hierarchy

COMPONENT	DEFINITION
MISSION **VALUES** **VISION**	Our Purpose: Cause – Action – Impact Guiding principles that guide our actions Picture of our "preferred future"
STRATEGIC OBJECTIVES **(Level 1)**	Broad-based, long-term (3-5 yrs. out) aims that move the business unit towards actualizing its vision
DIVISION GOALS **(Level 2)**	Specific, quantifiable, realistic targets that move the business unit towards accomplishment of a strategic objective over a specified period of time (SMART - specific, measurable, achievable, realistic, time-bound)
KEY STRATEGIES **(Level 3)**	Key activities/steps required to achieve a specific goal (SMART and assigned to a business unit and person)

UC ANR Mission and Vision

UC ANR Mission

Engage UC with the people of California to achieve innovation in fundamental and applied research and education that supports

- sustainable, safe, and nutritious food production and delivery
- economic success in a global economy
- a sustainable, healthy, and productive environment
- science literacy and youth development programs

UC ANR 2025 Strategic Vision (April 2009)

UC ANR envisions a thriving California in 2025 where healthy people and communities, healthy food systems, and healthy environments are strengthened by a close partnership between the University of California and its research and extension programs and the people of the state.

The University remains connected and committed to the people of California, who enjoy a high quality of life, a healthy environment, and economic success in a global economy.

UC ANR "Big Audacious Goal" - *Draft*

UC ANR will be recognized by EVERY Californian for having made a positive difference in their lives.

Vivid Description:

Our commitment to building an inclusive and equitable society will contribute to a stronger California; our people will mirror the diverse populations we serve. We will be proud, inspired, and motivated, knowing that our work has tangible local and global impact. We will develop a youth and adult population of science-minded critical thinkers with 21st century skills who are leaders in their communities. We will be a key player in California's workforce development and economic prosperity. We will fearlessly catalyze both rural and urban partners to make California the world's leader in agricultural production, food safety, security and distribution, and in natural resource management. Through engagement with our communities, we will strengthen California's preparedness and resilience to disease, climate change, fires, and drought. Others around the world will emulate the UC ANR model and implement its practical and affordable solutions.

UC ANR Core Values

ACCOUNTABILITY
We are responsive to the public and our stakeholders' needs, follow through on our commitments, and take ownership for our decisions and actions.

EXCELLENCE
We adhere to the highest standards of professionalism, quality, and expertise. We strive to be leaders in our respective disciplines and to foster a system that delivers superior outcomes.

INTEGRITY
We set high ethical standards and lead by example. We act in a credible and trustworthy manner. We treat all people with respect, professionalism, and fairness.

MISSION DRIVEN
We are dedicated to and align our work with the University's commitment to education, research, and public service.

INNOVATION
By establishing an environment which supports creative and diverse thinking, we consistently evaluate perspectives, re-define problems, and seek opportunities to identify, test, and implement new solutions that produce desired outcomes. We accept risk taking as an opportunity to learn.

COLLABORATION
We believe collective insight and action produces greater results than that of any individual or organization. We facilitate the exchange of information, expertise, and skills to optimize resources and generate the highest quality outcomes. We foster teamwork and, where appropriate, systemness.

DIVERSITY & INCLUSION
We embrace diversity, equity, and inclusion in all forms. We strive for a community that fosters an open, inclusive, and productive environment where we respect the potential of all individuals to make a positive contribution.

COMMUNITY
We make a difference through local, participatory engagement.

These core values are the principles that guide our actions

UC ANR *Draft* Goal Portfolio

UC ANR Strategic Objectives

The following five strategic objectives are broad-based, long-term aims that will move UC ANR towards actualizing its vision. All UC ANR goals support one of these objectives.

Executing the Mission:

Research and Extension	Advance and encourage forward-thinking, science-based solutions through discovery and engagement with Californians to address local issues with global impact

In Support of the Mission:

People	Attract, develop and retain diverse, highly productive, talented, and motivated people who exemplify our core values and thrive in a culture of equity and inclusion, service, innovation, and change
Financial Stability	Ensure financial strength of the University through sustainable and innovative financial models with efficient and effective financial management practices
Operational Excellence	Optimize delivery of programs and services through systemwide implementation of best practices that promote efficiency, effectiveness, health, safety, confidence, and quality
Policy & Advocacy	Advance UC's mission by marshalling the institution's expertise and external partners to effectively advance public policy issues and communicate the value of UC to our stakeholders, California, and the world

UC ANR *Draft* Division Goal Snapshot – *2020-2025*

Strategic Objective	Goal #	Owner	Goal Topic
Research and Extension	1	Powers	Strengthen Research and Extension Partnerships
	2	Bell	Increase UC ANR's Virtual Reach
	3	Humiston	Build Sustainable Economies for Working Landscapes
	4	Youtsey	Scale-up the Innovation and Entrepreneurship Program
	5	Forbes/Bell	Modernize Digital Information Delivery System
People	6	Fox	Improve Diversity, Equity, and Inclusion
	7	Brown	Recruit, Develop and Retain People
	8	Gable/Miner	Support Volunteerism
Financial Stability	9	Tran	Generate Revenue and Optimize Resource Deployment
	10	Krkich	Expand and Diversify Fund Development
Operational Excellence	11	Tran	Improve Efficiency and Strengthen Infrastructure
Policy & Advocacy	12	Forbes/Megaro	Strengthen Communication and Advocacy

Focus: Increasing Program Resources

Presenters:

- **Tu Tran**, Associate Vice President – Business Operations
- **Jennifer Bunge**, Director, Resource Planning and Management
- **Lorna Krkich**, Executive Director, Development Services
- **Linda Forbes**, Director, Strategic Communications
- **Anne Megaro**, Director, Government and Community Relations
- **Bart Sapeta**, Director, Facilities Planning and Management

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Roadmap for Increasing Program Resources

- Revenue/Savings
  - Increase program revenue and leverage admin and system efficiencies

- Fundraising
  - Expand capacity and increase/diversify fundraising

- Operational Efficiency and Infrastructure
  - Modernize business systems to improve efficiency and invest in upgrading facilities infrastructure

- Advocacy and Communication
  - Raise awareness of UC ANR and its impact on Californians through measurable communications and advocacy strategies

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2016-2020 Accomplishments

New Revenue & Savings

Revenue (across target categories) has increased by $11.2M since FY 2016

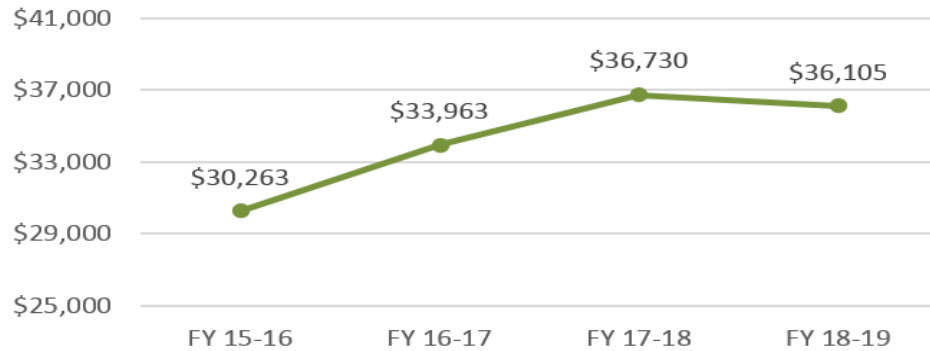$2M in efficiencies by the reorganization of 5 units
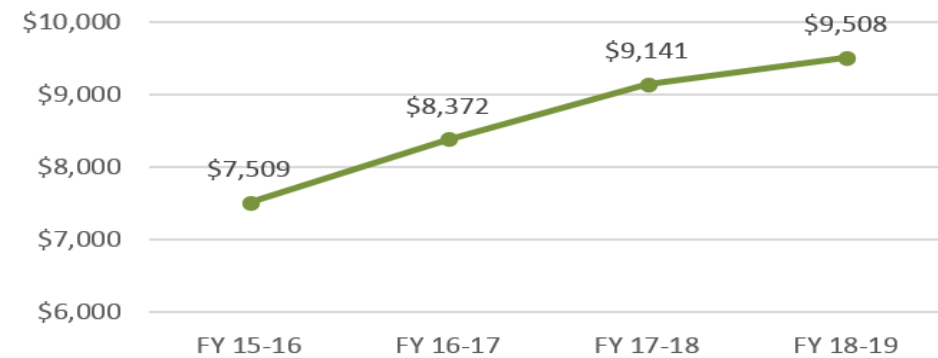
$3.2M in non-traditionally funded positions (28 positions)

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Increasing Key Revenue Categories Help Overall Budget

Revenue (across target categories) has increased by $11.2M since FY 2016

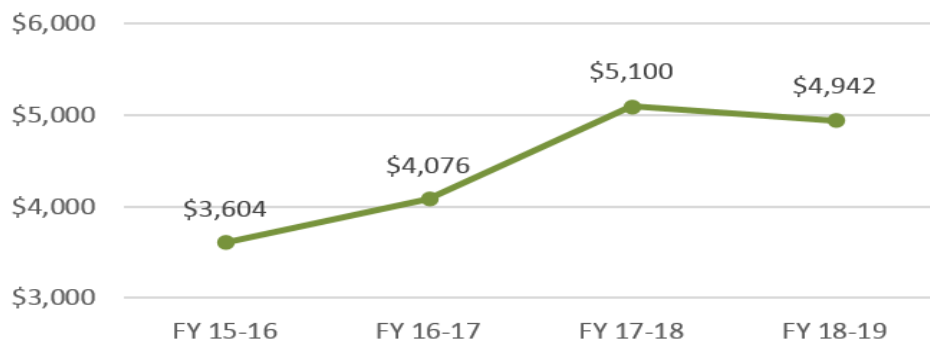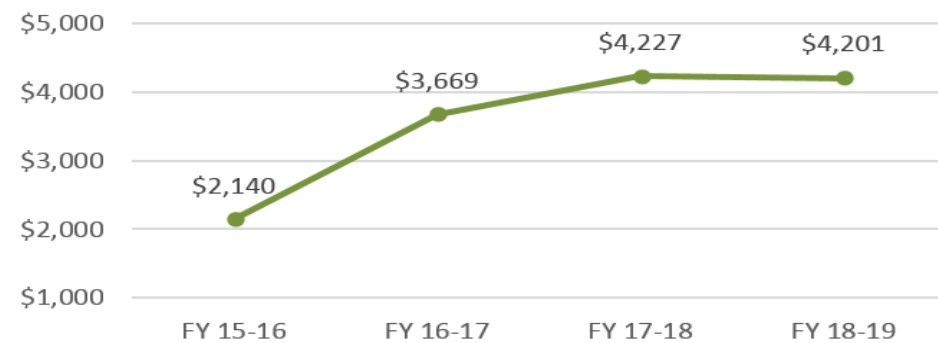**19% Growth in Contracts and Grants**

FY 15-16	FY 16-17	FY 17-18	FY 18-19
$30,263	$33,963	$36,730	$36,105

27% Growth in Endowment Income

FY 15-16	FY 16-17	FY 17-18	FY 18-19
$7,509	$8,372	$9,141	$9,508

27% Growth in Recharge

FY 15-16	FY 16-17	FY 17-18	FY 18-19
$3,604	$4,076	$5,100	$4,942

49% Growth in Indirect Cost Recovery

FY 15-16	FY 16-17	FY 17-18	FY 18-19
$2,140	$3,669	$4,227	$4,201

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18

Working to Develop New Funding Sources

Non-traditionally Funded Positions 2017-19		
Position	**Funder**	**Salary Savings**
10 Academics (Advisors & Specialists)	CA Table Grapes Commission (2), USDA NRCS (2), UC Merced (1), UC Santa Cruz (1), Santa Clara County (1), San Mateo County (1), Imperial County (1) CA Citrus Research Board (1)	$775K per year for 5 years*
14 Programmatic Staff Positions	CA Department of Food & Agriculture	$2M per year for at least 3 years
4 Staff Research Associates	CA Walnut Board, Almond Board of CA and CA Pistachio Research Board jointly	$425K per year for 3 years
28 Positions Total		**$3.2M+ per year**

*Citrus Research Board is $75K per year for ten years

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2016-2020 Accomplishments

Fundraising

- $6M in Presidential Matching Endowments

- $650K from one donor to initiate Climate Stewards program

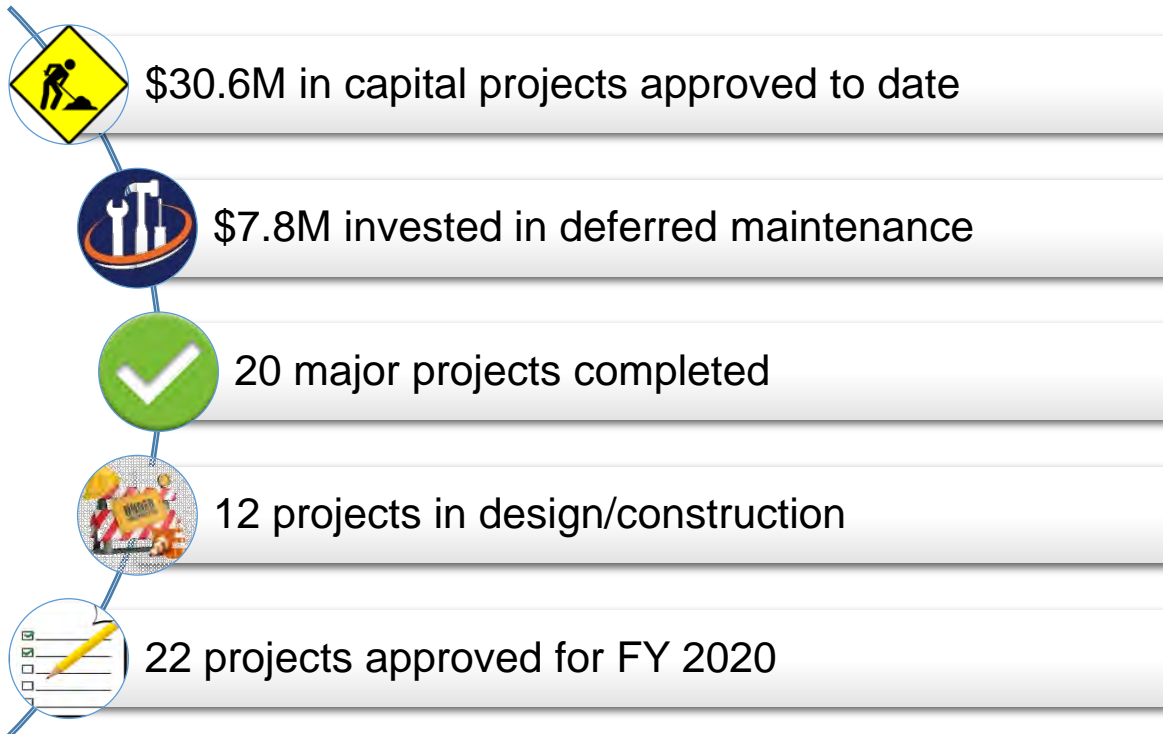- $203K & 550 new donors in first two years of UC ANR's exclusive giving day

- 8% annual increase in giving FY19 and 20 compared to 1.5% and 4.2% nationwide
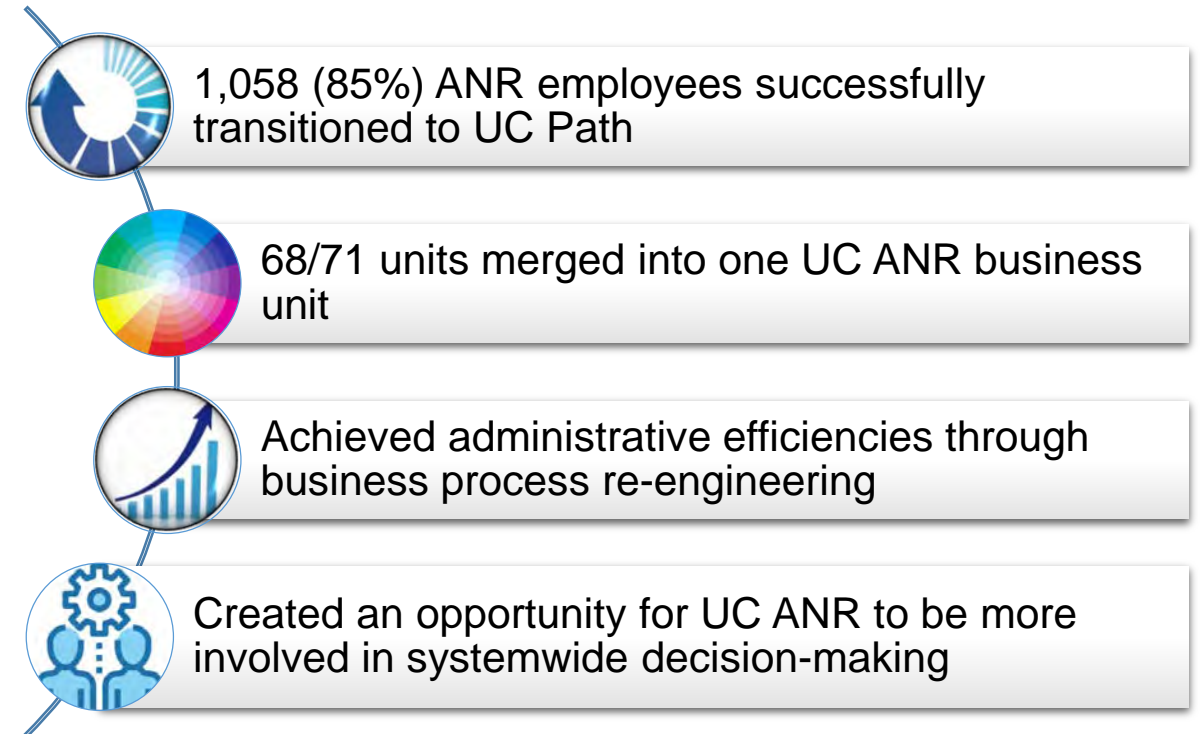
- 27% increase since FY16 in number of endowments (56 to 71)

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2016-2020 Accomplishments

Facility Improvements

- $30.6M in capital projects approved to date
- $7.8M invested in deferred maintenance
- 20 major projects completed
- 12 projects in design/construction
- 22 projects approved for FY 2020

New Business Systems

- 1,058 (85%) ANR employees successfully transitioned to UC Path
- 68/71 units merged into one UC ANR business unit
- Achieved administrative efficiencies through business process re-engineering
- Created an opportunity for UC ANR to be more involved in systemwide decision-making

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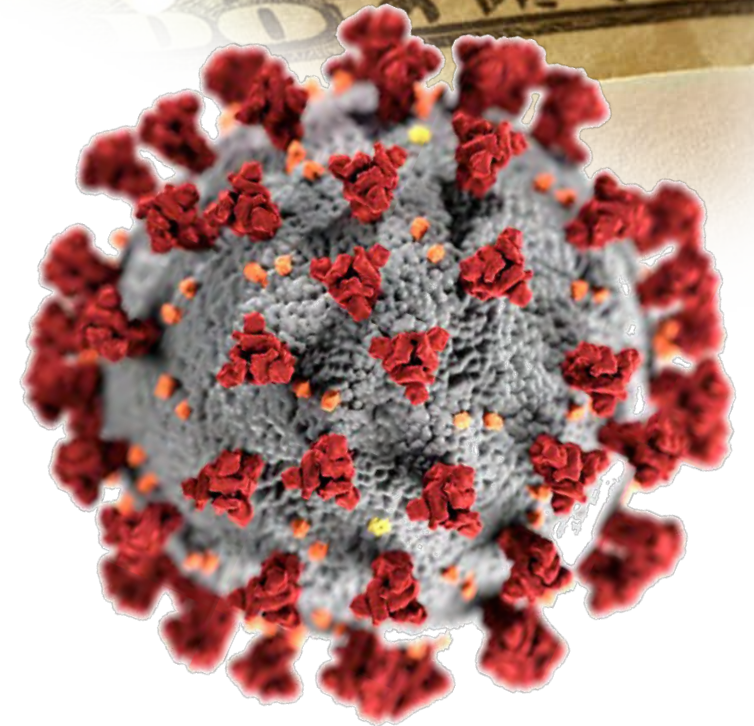
2016-2020 Accomplishments

Advocacy and Communication

- Conducted two successful UC Regents/state legislator tours

- Held first annual UC ANR Day at the Capitol

- Increased government communications training: 88% of County Directors; 79% UC Master Gardener Coordinators

- Project Board launched to collect impact stories of UC ANR efforts

- Strategic Communications & Publishing - combined strategic plan completed

- Media pickup (July 2019 – July 2020): 1,107 clips and 1.75B impressions; 20% growth in social media followers

- Developed communications toolkit with social media and branding guidance

Challenges – Revenue/Savings

- State and federal funding has not kept pace with mandated cost increases for the past 20 years

- 12.7% reduction to FY20-21 budget due to COVID-19

- FY21-22 budget could face further reductions

- Less state revenue and spending, expected recession due to COVID-19

- Multiple competing priorities and limited staff/academics

- Continued revenue growth dependent on academics

UCCE Academics in 1990
202 Specialists, 326 Advisors

UCCE in 2019
123 Specialists
164 Advisors
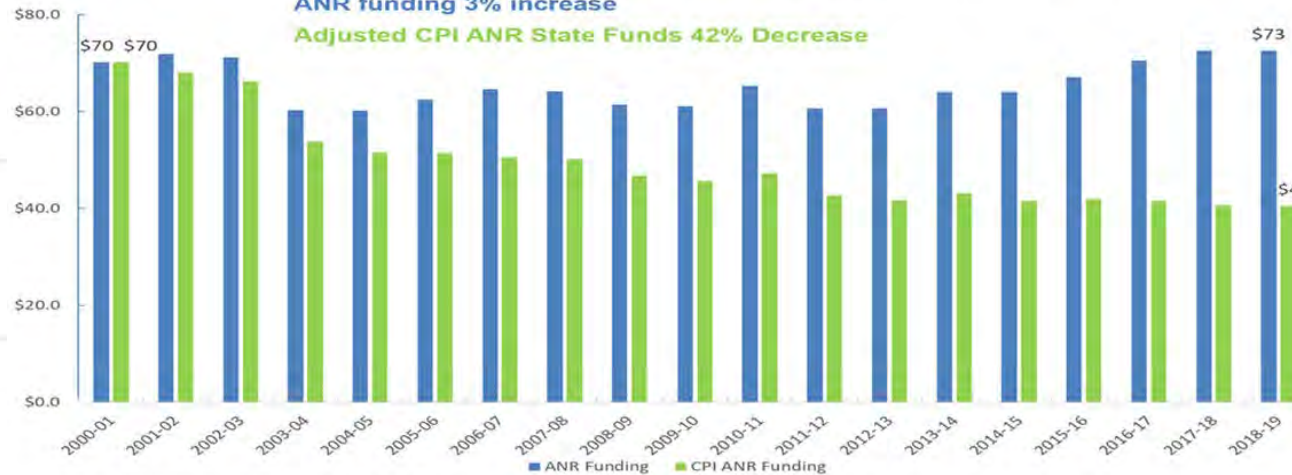
Number of UCCE Academics

The 1914 Smith-Lever Act creates Cooperative Extension

UC ANR State Funds
Unadjusted vs Adjusted for Inflation
(in millions)

Cumulative Increase % Change FY 2000 - 2019:
ANR funding 3% increase
Adjusted CPI ANR State Funds 42% Decrease

$70 $70

$73

$41

■ ANR Funding   ■ CPI ANR Funding

Inflation rate uses the California Price Index Source: https://www.dir.ca.gov/oprl/CAPriceIndex.htm

Academic counts are rounded

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Challenges – Fundraising

- Culture of philanthropy
- Grow prospect pool
- Limited history of fundraising and few individual donors
- ANR infrastructure: website, marketing

MIND SHIFT → SKILL SHIFT → CULTURE SHIFT

Challenges – Facilities and Business Systems

- UC ANR's infrastructure is inadequate for modern research and public outreach

- Most of the facilities are over 50 years old

- Lack of funding over many decades contributed to deterioration of facilities and infrastructure

- Seismic deficiencies

- Outdated and inadequate electrical service and distribution systems

- Presence of hazardous materials that prevents renovation, proper usage and maintenance

- Inadequate accessibility conditions

- Increased accountability and compliance

- Dependencies on UCOP and campuses

- Additional system implementation requirements by UCOP

Challenges – Advocacy and Communication

- Public awareness of UC ANR's impact is poor

- Inconsistent/confusing branding

- Presence in every county – over 290 supervisors and up to 58 local budgets

- Strategic Communications budget and resource constraints impede effectiveness

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Goal 9: Generate Revenue and Optimize Resource Deployment (Tran)

Draft Goal
Develop new sources of revenue and increase non-state and federal revenue by 40% by July 2025, optimize fund deployment to reduce reliance on state and federal funds by 10%, and increase utilization of restricted funds by 35% by July 2025.
Proposed Key Strategies
A. Identify opportunities to increase external funding by 2% annually through recharge services by July 2025 (e.g., potential increased fee income and cost recovery from Research and Extension Centers, the Integrated Pest Management program, and other UC ANR support operations).
B. Continue new funding models that incorporate shared funding of positions with industry and other partners and leverage partnerships in research and extension, leading to 3 funded positions by July 2021.
C. Work with REC System to enhance utilization of capital assets (e.g., land leases, etc.) by December 2021.

Goal 10: Expand and Diversify Fund Development (Krkich)

Draft Goal
Raise $30M ($20M Program/$10M Capital) through diversification and expansion of our development capacity by June 2025.
Proposed Key Strategies
A. Identify and qualify donor prospects for proposed campaigns (ongoing).
B. Roll out planned giving materials and website, beginning with 4-H in FY21.
C. Engage volunteers in Giving Days training to increase reach and revenue.
D. Increase donor stewardship activities.

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Goal 11: Improve Efficiency and Strengthen Infrastructure (Tran)

Draft Goal
Drive and achieve efficiencies within UC ANR by reducing administrative costs, modernizing business systems (e.g., UCPath), and recapitalizing UC ANR infrastructure by June 2025.

Proposed Key Strategies
A. Align the REC system Strategic Framework with the goals of the Facilities Planning and Management (FPM) unit to identify and prioritize capital investments by September 2021.
B. Identify and begin implementation of modernized, efficient administrative services across UC ANR that will result in a reduction in permanent funding allocated toward administrative programmatic support staff by July 2021.
C. Complete consolidation of UC ANR employee groups to UC ANR business unit in UCPath by December 2021.
D. Consolidate UC ANR financial information in the re-design and modernization of UC's Financial Consolidation Cloud System (FCCS) by December 2021.

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Goal 12: Strengthen Advocacy & Communication (Megaro/Forbes)

Draft Goal
Raise the visibility of UC ANR's capabilities, accomplishments, key programs, research, and people through implementation of measurable communications and advocacy strategies by June 2025.
Proposed Key Strategies
A. Increase awareness and support for UC ANR by strengthening relationships and effectively communicating with community leaders and government officials throughout California by July 2021 and ongoing, achieved through UC ANR employee trainings and government official engagement at events and site visits.
B. Improve/expand UC ANR outreach to the CA Latino community by increasing Spanish print, digital and radio media coverage of UC ANR content; growing Spanish-language YouTube, social media and blog followers; increasing viewership of Spanish web content; increasing NOS presence in community events as budget allows; supporting HR in communicating job opportunities to the Latino community; and increasing collaboration between NOS and other UC ANR stakeholders by 2025.
C. Complete and begin executing a five-year comprehensive Strategic Communications plan in partnership with Publications by June 2020.

Tweets   Tweets & replies   Media   Likes

Debby Stegura @DebbyStegura · 2d
Blown away by @ucanr tour of @UCCESonoma work—Beretta dairy, @UCMasterGarden, @Stuhlmullerwine, @California4H. Saw #kincaidfire reach, how to prepare better for future fires. @ucanr work benefits all of CA. Thank you!

1   2   11

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Return to the Roadmap

These goals are directly aimed at creating and/or optimizing resources to support the UC ANR mission.

- Revenue/Savings
- Fundraising
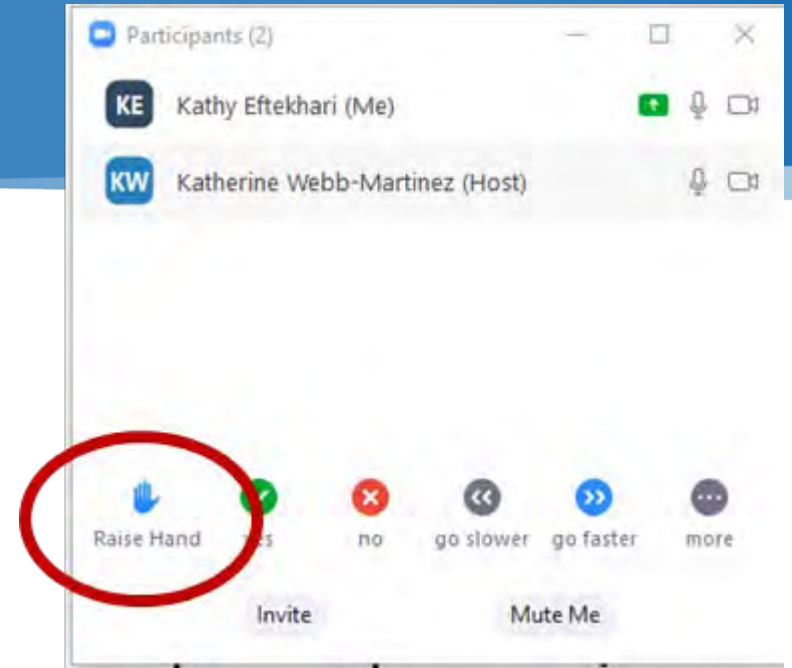- Operational Efficiency and Infrastructure
- Communication and Advocacy

→ What thoughts do you have about efforts to increase program resources?

→ What can we do to address our challenges?

→ How can we improve our key strategies?

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Clarifying Q&A

Any <u>clarifying</u> questions?

- Please "raise your hand";
  Katherine will call on you.

Note: You will have the opportunity to provide input during today's breakout sessions.

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BREAK!

Breakout Discussion

Goal Breakout Group Instructions

WHAT YOU THINK ABOUT IS WHAT YOU BRING ABOUT.
-SANDRA YANCEY – EWOMENNEYWORK

10 rows for each question

1. You will be assigned to a breakout group

2. Open "Chat", now and click on survey link
   https://www.surveymonkey.com/r/ANRRESOURCES
   ▪ This PPT sent in advance; also in chat; use as reference during discussion

3. Choose a recorder

4. Recorder (only) – open survey link, share screen and capture group's input in the survey (submit only one survey per group)

   ▪ Anything missing? What other ideas do you have for increasing UC ANR's program resources?

   ▪ What actions could those of you here today take to contribute to our shared success in strengthening program resources?

   ▪ Other things to consider….

36

Additional Zoom Information

➢ You will have 30 min in your break-out room

- ▪ You will automatically re-join the main room when the time is up

- ▪ 10 and 5 minute warnings will be given

- ▪ If you have a question, click the "Ask for Help" button and one of us will join your group
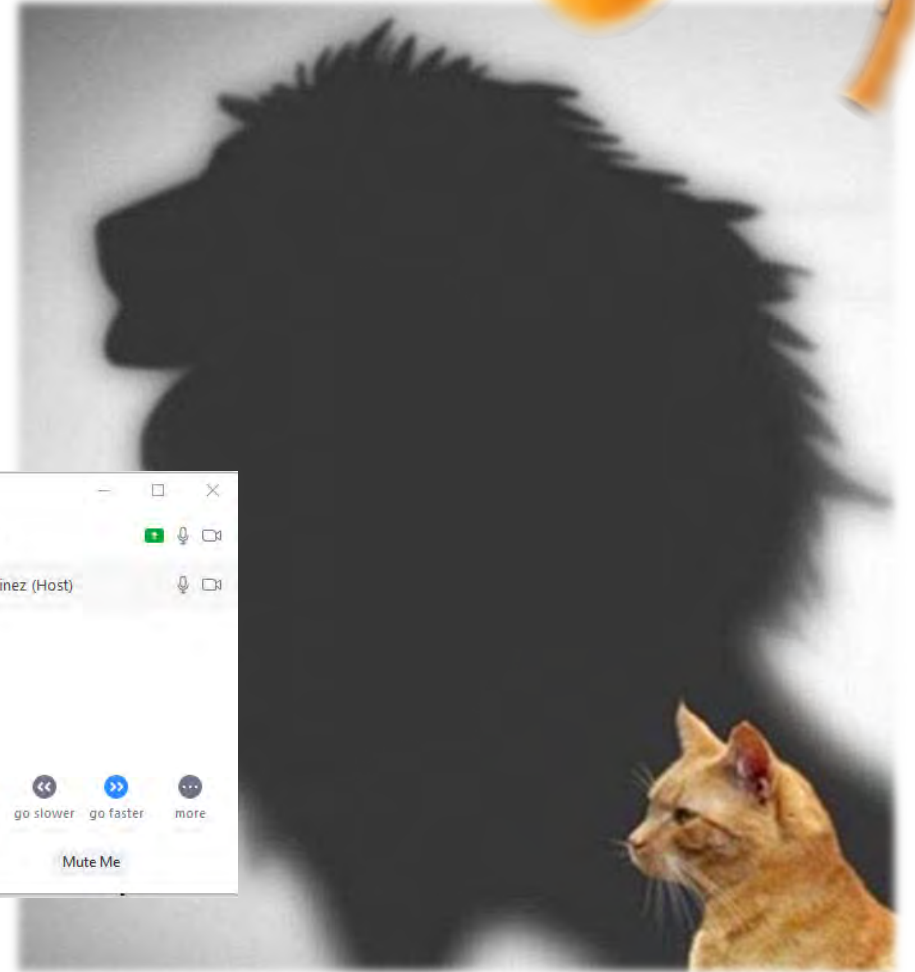
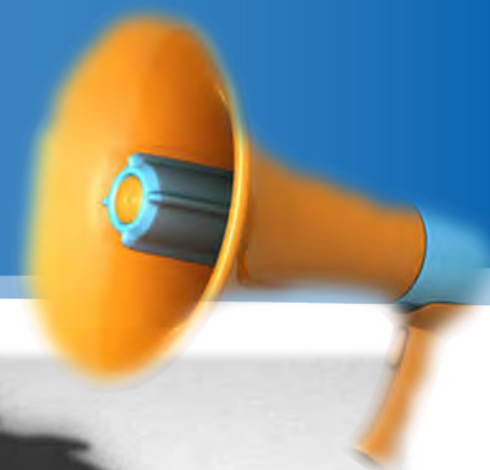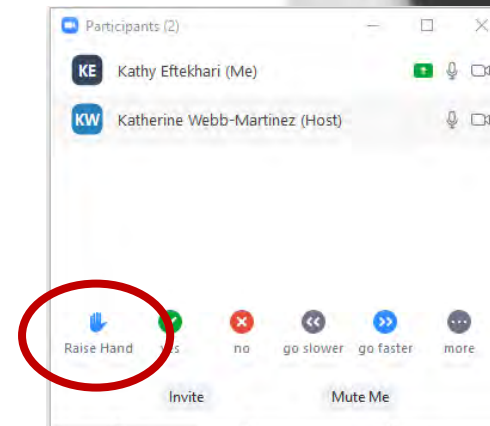➢ Hit "Done" before exiting the survey!!!!

Summary Comments/Questions

Goal Owners & Participants

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Discussion Report-out

➢ Each reporter please ensure you have clicked "Done" to save your survey

➢ Comments/Questions (20 min)
- If you have an idea, question or reflection from your breakout discussion that you would like to share, please raise your hand and Katherine will call on you.

➢ Aggregated survey comments will be shared via ANR Update

➢ Goal owners will consider all survey comments as they revise/develop the 2020-2025 goals.

Describe ANR's Future

➢ Write <u>one</u> word in the *Chat* that most excites you about UC ANR's future.

➢ We'll create a Word Cloud after all of the Input Sessions and post this in a future ANR Update

Growth

Thank You & Next Steps

- Thank you for your participation and input!

- Today's input will inform the 2020 UC ANR Strategic Plan revision.

- If you have any questions or further input regarding the UC ANR Strategic Plan, please feel free to contact
  - Kathy (Kathy.Eftekhari@ucop.edu) or
  - Katherine (Katherine.webb-Martinez@ucop.edu)