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# University of California Office of the President

UC External Relations and Communications (UC ER&C)  
2019-2024 STRATEGIC PLAN

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# Strategic Plan Purpose

This strategic plan was developed to guide UC's External Relations & Communications Division (UC ER&C) expertise, efforts and resources on actions which best serve the University of California while aligning and integrating the division's collective efforts. UC ER&C's work centers on advocating, promoting and amplifying the university's priorities. In short, the division manages the organization's image, reputation and presence with key internal and external stakeholders.

The strategic plan establishes a multiyear framework which allows UC ER&C to prioritize resources to most effectively support the university's mission. The plan provides specific goals to lead and support systemwide collaboration; elevate UC's brand and reputation; grow and activate UC advocates; cultivate and engage key legislators and influencers; advance UC priorities at the state and federal level; and attract, retain and develop the diverse, creative and inspired talent needed to achieve all aspects of the UC ER&C mission.

UC ER&C is the seventh division of the UC Office of the President to embark on a standardized strategic planning process. This UC ER&C plan follows the format and approach of strategic plans completed for the Chief Financial Officer, Chief Operating Officer, Agriculture and Natural Resources, Academic Affairs, UC Health and UC Legal divisions. Division strategic plans serve as input into the UCOP annual budgeting process.

In addition, UC ER&C was the first division to incorporate into its strategic plan the outcomes of the UCOP Strategic Framework being finalized on a parallel timeline. Going forward, UCOP divisions will adopt and adapt the various components of the Framework, including the UCOP Mission, Vision, Values and Strategic Objectives.

# Introduction & Background

This strategic plan was developed in collaboration with the leadership team and staff of the University of California External Relations and Communications Division (UC ER&C) and in consultation with stakeholders at UCOP and campuses/locations.

In May 2018, the UC External Relations and Communications Division consolidated several UCOP externally-facing functions into a single division with the goal of aligning and integrating efforts to promote, protect, advocate and amplify the University of California's image, reputation and presence with key internal and external stakeholders.

The united UC ER&C Division now focuses on sustained efforts to expand, manage, cultivate and advance positive and ongoing stakeholder relationships through the following functions:

- Executive Communications
- Federal Governmental Relations
- Institutional Advancement and Constituent Relations
- Institutional Communications
- Legislative Analysis
- Marketing Communications
- Media Relations
- State Governmental Relations
- UC Health Communications

# 2019 UC ER&C Strategic Planning Team

The UC ER&C Strategic Planning Team met eight times between February 2019 and November 2019.

NAME	TITLE / UC ER&C DEPARTMENT
<b>Claire Holmes</b>	<b>Senior Vice President, External Relations &amp; Communications</b>
Vanessa Correa	Chief Brand Officer & Director, Marketing Communications
Michael Crawford	Director, UC Health Communications
Claire Doan	Executive Director, Strategic Communications and Media Relations & Press Secretary
Kieran Flaherty	Associate Vice President, State Governmental Relations
Yem Ling Fong	Director, Business Operations
Chris Harrington	Associate Vice President, Federal Governmental Relations
Bob Hartnagel	Chief of Staff, Governmental Relations
Heather Kopeck	Director, Development Policy and Advancement Relations, Institutional Advancement
Carolyn McMillan	Editorial Director, Marketing Communications
Shelly Meron	Director, Executive Communications and Engagement
Geoff O'Neill	Associate Vice President, Institutional Advancement
Candace Sue	Associate Vice President, Communications, Marketing & Media Relations
Frank Thomson	Director, Legislative Analysis
Sybil Wartenberg	Director, Institutional Communications

*Facilitator: Deanna Geddie, Senior Program Manager, UCOP Strategy & Program Management Office*

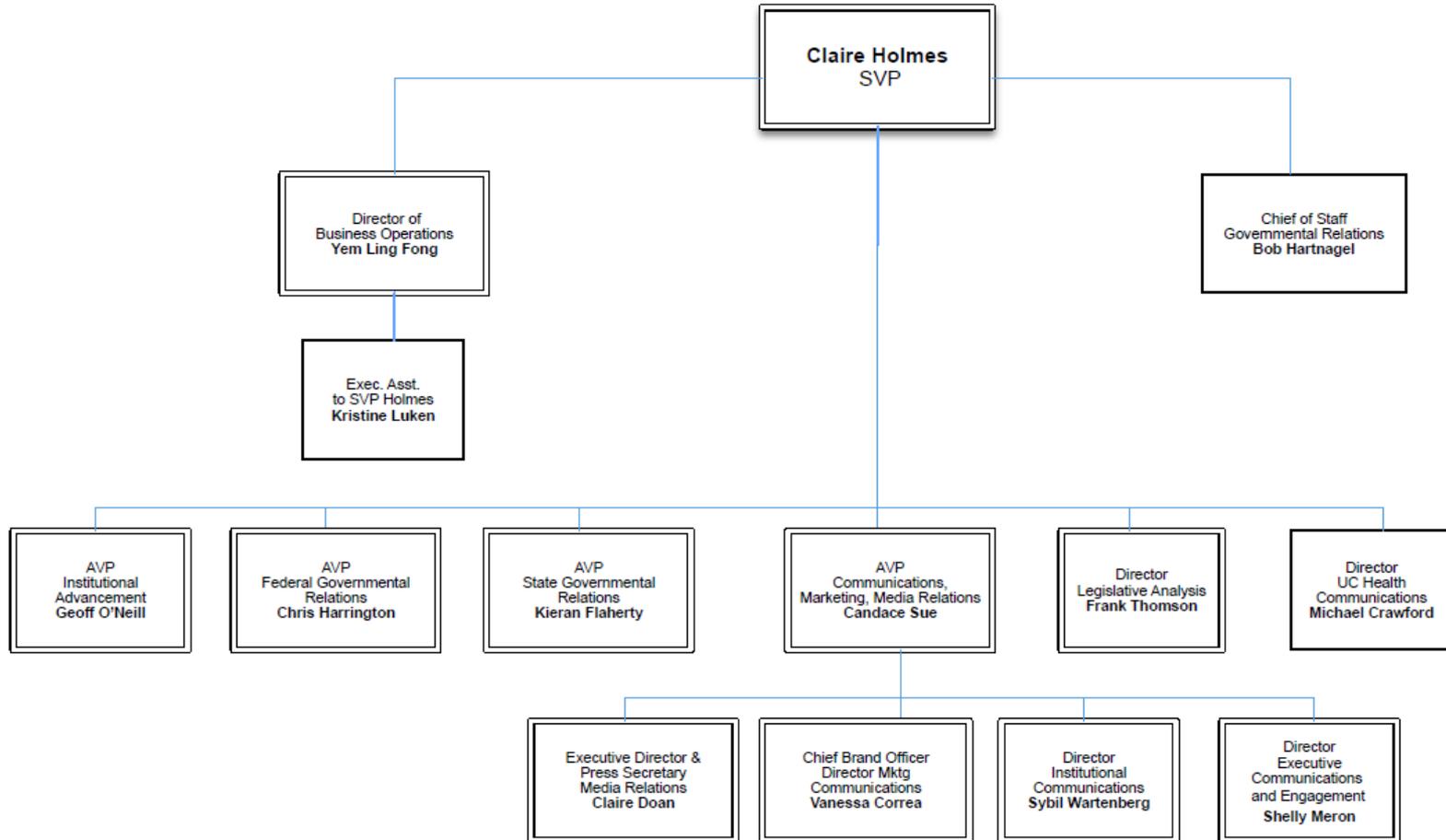
# UC ER&C Organization Structure



Office  
of the  
President

## External Relations and Communications

September 2019



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# UC ER&C Strategic Planning Decision Drivers & Opportunities

# UC's Market Position

The University of California is widely recognized as the most prestigious public higher education system in the world. It is known for its depth, breadth and excellence in teaching, research and public service. UC's recent market research highlighted the following:

- UC is highly regarded and appreciated.
- UC is not top-of-mind for most voters; cost of living/housing is No. 1.
- Voters are stressed and not sure if California is moving in the right or wrong direction.
- Many feel UC has abandoned California, though UC's historic contributions are noted and acknowledged.
- Facts and data do not shift the narrative.

In recent years, higher education has faced growing negative public perceptions stemming from increased costs, student debt, and more recently, a nationwide college admissions scandal.

Some state leaders hold views that the university is out-of-sync with key populations and is overly insulated and too costly. Calls for legislative scrutiny and oversight of UC resulted in five recent audits by the state and/or federal government (Title IX), eroding trust and credibility in the minds of many key stakeholders. As a result, UC has been put in a defensive position to recover trust and repair relationships. With a new governor in place, the organization has begun to find new support. However, many state legislators still hold strong negative views about the university, particularly in the area of labor relations.

External scrutiny and negative media coverage, combined with ongoing budget challenges, have impacted employee morale in some locations.

In Washington, D.C., UC is favorably viewed and has strong relations with key federal agencies and the California delegation, which is heavily Democratic. However, increased focus on the federal deficit as well as a divided government have placed enormous pressure on domestic spending, including in areas that directly impact UC's priorities, particularly as work in D.C. is largely advanced by a political party.

# External Relations Industry Trends

In addition to the position of higher education and UC in the California market, the UC ER&C strategic planning team also examined industry trends. The following trends will drive, impact and alter UC ER&C's work over the next five to seven years. (*Highlights from Institute on PR study in 2018, Association of Accredited Public Policy Advocates study 2018.*)

- Studies predict that in five years, the average consumer will not be able to distinguish between news stories written by journalists (earned media) and promotional content purchased by an organization (paid media). In fact, many predict the average person will not even care if they can tell the difference between the two.
- Owned (information we publish) and paid media budgets (advertising) will continue to grow, which has the potential to create more fake news and purposeful distortion of the truth.
- In 2018, 92 percent of public relations executives cited “fake news” as the most challenging threat to their organization, followed by the purposeful distortion of the truth (91 percent).
- Defense of malicious behavior and lack of corporate transparency (81 percent) are also high on the list of potential issues confronting organizations.
- Brands are increasingly using digital political advocacy services, mobile usage, and data-driven targeted campaigns and artificial intelligence (AI) to reach audiences/influencers and for reputation management — including online news, social media mentions, consumer review webpages, search engine optimization and marketing.
- The media are trying to find a viable business model and higher education coverage has been reduced or eliminated in favor of reporting on other topics. Coverage of positive contributions from higher education in general is sublimated by perceived scandals. And all organizations are now speaking to a highly skeptical public audience.
- According to the 2019 Edelman Trust Barometer, 75 percent of employees trust “my employer” as a source of information above “Government, NGOs, Business and Media.”
- Company values matter — in Met Life's Role of the Company survey, employees — especially millennials — are willing to make trade-offs in salary and other benefits to work for an employer who aligns with their values.

# External Relations Industry Trends

- As universities become more diverse, they need to develop new and varied strategies to engage more effectively with these populations throughout the lifecycle of the relationship — from pre-application to alumni status.
- “Venture philanthropy” has permeated every level of giving; while this mindset may result in larger gifts, institutions need to have effective policies in place to be assured that they are exercising appropriate control over all gifts.
- Even public institutions that are committed to transparency and accountability can be inundated with public records act requests and need to have processes in place to ensure responses are coordinated and context is provided when it may be beneficial.

# Opportunity for UC and UC ER&C

Our charge and opportunity is to ensure that the university is seen as a source of pride and individual promise in California. The strategy to accomplish this must drive an emotional connection by emphasizing how UC enables people to achieve their individual goals and provides benefit to all, regardless of an individual's connection to the university. At a time when the value of a college degree is increasingly being questioned, and the impact and relevance of scientific and medical research is frequently met with skepticism, these efforts are even more challenging.

UC ER&C will strengthen efforts to:

- Cultivate positive working relationships with key leaders in Sacramento and Washington, D.C., to advance UC's interests and protect and increase funding to support research and other UC priorities;
- Work with partners in state and federal governmental relations at campuses/locations and in other areas to unite us in our pursuits;
- Expand advocacy work through targeted, sophisticated and integrated efforts with media, institutional, digital and executive communications;
- Lay the foundation for a 'best place to work story' for current and potential UC employees;
- Cultivate goodwill and pride among employees;
- Engage the business community and other key influencers, and foster stronger partnerships and affiliations with alumni and industry;
- Develop a UC Health brand and communicate the benefits and contributions of UC Health to individuals and to the advancement of science and technology; and
- Work closely and in partnership with campuses, labs, medical centers and ANR to convene and serve as a central point for coordination and integration of work that benefits the UC system. We will amplify the broadest organizational efforts to engage with a wide variety of university stakeholders including donors, alumni, community leaders, students, parents, retirees and others.

The UC ER&C strategic plan outlines the areas of focus and key tactics to address barriers, leverage opportunities and drive the national and state conversations on higher education and the role of our adjunct health system. This will require sustained investment in a multiyear effort that extends to diverse audiences to enable connection and inclusion in our university.

# Areas of Unmet Communications Needs Identified in the Strategic Planning Process

The strategic planning process identified three areas of focus which are critical to the ability of the UC ER&C Division to deliver services to UCOP and UC systemwide.

- 1. UCOP-specific communications:** Through stakeholder input, it was identified that expectations for what UC ER&C should deliver and what the division is delivering may be misaligned. Many in the UC Office of the President are unable to obtain basic communications or design services and are often turned away because the UC ER&C Division is focused on broader organizational goals and lacks bandwidth to provide that level of service and guidance. This results in outsourcing low-level work or forgoing information flow to UCOP staff, which in turn has contributed to climate issues. This strategic plan includes renewed attention to resources dedicated to support UCOP HR and other functions in the UC Office of the President to ensure UC ER&C systemwide efforts are appropriately resourced to provide UCOP partners with strategic, on-brand communications support. This activity is underway and being addressed in partnership with HR.
- 2. Enhanced marketing communications and advocacy:** If UC pursues a statewide campaign, the level of investment in marketing communications and advocacy will need to increase and be sustained over multiple years. This investment would not be in FTEs but in dollars for outreach campaigns and paid media to increase visibility of UC, its goals, achievements and initiatives, and to continue attracting those who will advocate on issues of relevance to the university.
- 3. UC Health communications:** For the last two years, UC ER&C has been investing in UC Health's brand development and reputation management with a senior FTE and consulting services which have enabled the launch of a strategic communications program and brand platform. There is tremendous opportunity in this area to highlight the contributions of UC Health and amplify the message. Further investment is needed to develop a digital presence and the materials to support the growth of clear, coherent systemwide messaging, including opportunities to showcase the importance of UC Health to local communities, the state and beyond.

# Responding to Stakeholder Input

## **Early Input — February 2019**

- UC ER&C staff participated in an exercise to identify behaviors across the division which served as input for establishing the division's core values. Staff were also engaged to identify the division's internal strengths and weaknesses as well as external opportunities and threats. See next slide on the outcomes of this SWOT analysis.
- Approximately 170 identified UC ER&C stakeholders were asked for early input into the UC ER&C strategic planning process. Through an email link to an online survey, stakeholders were asked two key questions: (1) What are your priorities over the next three to five years?; and (2) How can UC ER&C partner with you to achieve those priorities? Only 21 stakeholders responded to the survey (12 percent response rate).

## **Review of Draft Plan — October 2019**

- UC ER&C staff participated in manager-led team meetings to review and provide feedback on the draft UC ER&C Mission, Vision, Values and Goal Statements.
- Strategic planning team members reached out to key stakeholders at UCOP and campuses/locations to share the draft strategic plan components, and met in 1:1 meetings to solicit input. Of the 28 stakeholders approached, feedback was received from 19 (68 percent response rate).
- President Napolitano was presented with an early draft of the plan's components and offered direct feedback to UC ER&C leadership.
- Input from staff, stakeholders and President Napolitano resulted in the renaming and reframing of the division goals, and refinements to the values and vision.

# Reflecting UC ER&C SWOT Analysis

To ensure the plan's responsiveness to current organization and environmental conditions, the following considerations were outlined through a division-wide SWOT analysis. Feedback is ordered from most to fewest responses.

## **Strengths**

- Creative, knowledgeable and talented staff
- Highly productive, hardworking and nimble team
- Collaborative and integrated
- Committed, accountable and mission-driven
- Strategic and credible staff
- Connected with community and constituents
- Strong leadership/new structure
- Positive work environment
- Innovative
- Diverse staff

## **Opportunities**

- New government partnerships
- Alumni and stakeholder engagement
- UC campus/location relationships
- Current events/hot topics
- Public perceptions
- UC employees
- Regent relationships
- Presidential initiatives/directives
- UCOP divisions
- Multiyear budget framework
- Staff recruitment
- Community collaboration

## **Weaknesses**

- Connection and communication with division
- Staffing/resources
- Negative work environment and behaviors
- Connection and communication outside division
- Clear processes and strategy
- Reactionary/responsive
- Role clarity
- Complex decision-making/slow to move
- Diversity and inclusion
- Impact from reorganization
- Measurement of success

## **Threats**

- Political
- Reputation/public perception
- Collaboration/communication
- Funding/budgets
- Economy
- UC leadership
- Culture
- Lack of broader strategy
- UC bureaucracy/pace
- Physical space

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UC ER&C

Mission, Vision and Values

# UC ER&C Division Mission

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*Our Mission:*

We **engage the UC community and the public** to **build support and advance the mission** of **the university**.

**Our Cause**

**Who? What? Where?**

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**Our Actions**

**What we do**

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**Our Impact**

**Changes for the better**

# UC ER&C Division Vision

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## *Our Vision:*

External Relations & Communications will drive state and national conversations on higher education, research and health care, such that advocates are inspired and catalyzed to take action to support the University of California.

## *❖ Vivid Description:*

The University of California will be recognized as a trusted partner and the crown jewel of the state that contributes to the social and economic vitality of California and the nation. UC ER&C will inspire an expansive base of advocates to take action, support and advance the university. Our mission-driven work will protect and increase state and federal investments and private support. UC ER&C will impact public opinion through innovative approaches and strategic partnerships that build sustained value for higher education and public universities. UC ER&C will enhance pride among employees and be recognized as an inclusive employer of choice, successfully attracting top diverse talent from public and private competitors.

# UC ER&C Division Core Values



UC ER&C adopts the UCOP Core Values \*plus two additional division-specific 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.

## 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.

## 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.

## 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.

## 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.

## MISSION DRIVEN

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

## \*CREATIVE

We are curious and creative, and strive for excellence through innovative and agile approaches to our work.

## 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.

## \*STRATEGIC

We are tuned into the challenges we face and the opportunities we foresee. We approach issues with both short- and long-term perspectives, and sequence action steps in a purposeful way.

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# UC ER&C Strategic Objectives & Goal Summaries

# UC ER&C Strategic Objectives

UC ER&C adopts the UCOP Strategic Objectives with the exception of Financial Stability.

## Operational Excellence

Optimize delivery of programs and services through systemwide implementation of best practices that promote efficiency, effectiveness, health, safety, confidence, and quality.

## Executing the Mission

Enhance UC's ability to create and disseminate innovative research, scholarship, and opportunity through teaching, public service, and engagement for the benefit of California, the nation, and the world.

## Policy & Advocacy

Advance UC's mission by marshalling the institution's expertise external partners to effectively advance public policy issues and communicate the value of UC to our stakeholders, California, and the world.

## 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.

# UC ER&C Goal Snapshot

Strategic Objective	Goal #	Goal Owner	Goal Short Title	Priority
Operational Excellence	1	Holmes	Launch UC ER&C Strategic Agenda	●
Executing the Mission	2	Correa	Elevate UC's Boldly Californian Brand	■
	3	Doan	Uphold UC's Reputation	■
Policy & Advocacy	4	Turner	Grow and Activate UC Advocates	●
	5	Flaherty / Harrington	Cultivate and Engage Key Legislators and Influencers	●
	6	Flaherty / Harrington	Advance UC Priorities at the State and Federal Level	●
People	7	Kopeck	Attract, Retain and Develop Diverse Talent	■

Priority Key: ● : High Impact and/or High Urgency ■ : High/Moderate Impact and Moderate Urgency ◆ : High/Moderate Impact and Less Urgency

# UC ER&C Goal Summaries

Goal #	Goal Title	Goal Statement
1	Launch UC ER&C Strategic Agenda	Launch the UC ER&C strategic plan in 2020 to leverage division resources, collaborate across UCOP and throughout the university, and advance UC's mission and priorities, including support for the 2020 transition of the UC President.
2	Elevate UC's Boldly Californian Brand	Promote public perception and position the university as a trusted partner for Californians through a credible narrative showcasing UC's contributions to the state and nation; engendering a sense of community, pride and connection to UC; and positioning UC as an employer of choice with a campaign starting in 2020.
3	Uphold UC's Reputation	Implement a plan by 2021 to better coordinate and respond to public opinion, uphold public trust, position UC as a thought leader and positively influence the university's reputation.
4	Grow and Activate UC Advocates	Grow a broad base of UC supporters who are willing to take action in support of the university's fiscal, policy and organizational goals at both the state and federal level by 2024.
5	Cultivate and Engage Key Legislators and Influencers	Cultivate strong partnerships with key legislators and influencers to lay the foundation for increasing state and federal UC support by the end of calendar year 2024.
6	Advance UC Priorities at the State and Federal Level	Advance UC's mission by activating internal and external partners and leadership to effectively advocate on the university's higher education, research, health care, operational and fiscal policies and priorities between now and 2024.
7	Attract, Retain and Develop Diverse Talent	Improve our ability to attract, retain and develop a diverse workforce with the contemporary skills needed to achieve all aspects of the UC ER&C mission, vision and goals starting in early 2020.

Operational Excellence

Lead: UC ER&C Immediate Office

Priority: ●

**Goal: Launch the UC ER&C strategic plan in 2020 to leverage division resources, collaborate across UCOP and throughout the university, and advance UC’s mission and priorities, including support for the 2020 transition of the UC President.**

**Opportunity:** With a flat budget, limited resources and increased demand for UC ER&C involvement in UC priorities, UC ER&C will better serve the university by identifying and aligning division activities with priorities of our partners across UCOP and the UC system. UC ER&C will pursue and leverage the value of a systemwide approach to programs/projects. In the communications area, UCOP staff often possess few options to provide requested services for small and large projects which may or may not be part of the broadest strategic objectives, but which require a range of communications planning, design and writing skillsets that the division is not staffed to provide.

**Proposed Solution:** Conduct meetings and develop a systematic process to collect UCOP division, campus, medical center and lab colleagues’ priorities to assess and develop strategies for prioritizing our efforts and to determine projects and programs which we are capable of delivering and that enhance and support university priorities.

Serve as a convener, assessor and a central point for coordination and engagement, and identify ways to integrate work which benefits the system and the campuses and locations. Provide this system service to campuses/locations in such areas as state and federal government relations; assisting in increasing private, voluntary support of the university; increasing alumni career services; supporting employee communications (including labor relations, benefits and systemwide internal resources); communicating the UC system message (building public awareness of UC’s value through initiatives and campaigns, interacting with journalists and media outlets and coordinate responses on news coverage); and providing a systemwide analysis function for legislative and policy issues.

UC ER&C will assess the division’s current set of work against the UCOP Strategic Framework, establish priorities, identify opportunities for self-service, training, tools, templates or consulting assignments for tasks that do not directly align to the UCOP priorities, and develop plans to support strategic goals. UC ER&C will communicate the division’s expertise, products and services across UCOP and with campuses and locations, and establish formal structures for internal partnerships to ensure UC ER&C is a thought partner on systemwide initiatives. We will develop a sustainable support structure to address and support UCOP’s needs for communications services in a cost-effective manner and clearly communicate the availability of these services and how to access them.

**Benefits:**

1. UC ER&C staff time and effort will be focused on the most impactful projects and that contribute to the overall priorities of UC ER&C, UCOP and UC.
2. UC ER&C strategic agenda will be clear across the division, UCOP and with UC colleagues, allowing the divisions’ projects to be forward-thinking.
3. More effective communications, advocacy and government relations strategies and planning.
4. Clarify and distinguish purpose, roles and responsibilities of units within UC ER&C.
5. Address internal communications service needs of UCOP.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
1	<b>Launch the UC ER&amp;C strategic plan in 2020 to leverage division resources, collaborate across UCOP and throughout the university, and advance UC’s mission and priorities, including support for the 2020 transition of the UC President.</b>					
1a	Department heads provide a comprehensive description and review strengths and capabilities, priorities and gaps. Identify UCOP communications needs through stakeholder discussions and surveys; determine capacity and capability requirements. January 2020.					
1b	Department heads submit priorities, scope of work/list of projects based on stakeholder feedback. March 2020.					
1c	Secure plan approval and resource commitments, socialize with stakeholders. Explain and activate roadshow.					
1d	Implement plan, including hiring or vendor acquisition.					
1e	Outline expectations, communicate priorities, measure progress and continually improve					
1f	Develop UCOP/new President introduction plan for system.					

**Goal: Launch the UC ER&C strategic agenda in 2020 to leverage division resources, collaborate across UCOP and throughout the university, and advance UC's mission and priorities, including support for the 2020 transition of the UC President.**

**Assumptions:**

1. More robust engagement is achieved within existing budgets. No new UC ER&C positions will be allocated.
2. Consultation services are expected and consulting dollars are an option.
3. Priorities will be identified and trade-offs will be made about where to apply resources.
4. Campuses and locations support and partner with the division (i.e., through providing feedback and surfacing issues, sharing best practices).
5. UCOP communications support unit will only support UCOP divisions. Services limited to communications planning, design, writing, printing and production.

**Metrics and Targets:**

1. Increased number of staff working on multiyear goals; 75 percent of strategic actions (sub actions to each goal) completed on time and on budget.
2. Increased campus collaboration on projects or initiatives by 10 percent per year over established baseline over the next three years.
3. Ability to take on large-scale projects that are more impactful and align with UC priorities.
4. Increased relationships across UCOP and UC system bringing UC ER&C to the table as a thought partner; increase number of employees who say they understand the purpose of the UC ER&C division as a thought partner.
5. Increase campus satisfaction with division/departments.
6. UCOP staff satisfaction level with services provided by UCOP communications support unit.

## Executing the Mission

Lead: Marketing Communications

Priority: ■

**Goal:** Promote public perception and position the university as a trusted partner for Californians through a credible narrative showcasing UC's progressive and forward-thinking contributions to the state and nation; engendering a sense of community, pride and connection to UC; and positioning UC as an employer of choice with a campaign starting in 2020.

**Opportunity:** The university has a compelling story to share through its Boldly Californian brand about UC's role in providing educational opportunity for a diverse California student body, economic development for the state and its people, lifesaving medical care, and being a creative catalyst for the cultural and technological advances that have made the state known around the world as a driver of innovation. Telling that story builds positive feelings for UC.

**Proposed Solution:** We will create an authentic, unified and sustained narrative based on "Boldly Californian" that foregrounds UC's progressive values and actions on behalf of the people of the state, ignite interest and excitement in our future and how we contribute to real world solutions, and influence the public's affinity for the university. This narrative can take the form of a highly-visible brand campaign, informed by our market research, that intersects with campus-based events and messaging, the President's activities, and UC-wide storytelling and constituent engagement. The current UC Health brand development and outreach effort will ladder up to the overarching UC story, expanding positive feelings among patients and prospective patients. We will roll out an on-the-ground long-term affinity-building strategy aimed at students that will bear fruit down the line, both in terms of applications and prospective advocates.

**Benefits:**

1. Improve public perceptions of UC and its core values based on benchmarks from market research.
2. Ability to deploy a large and engaged advocate base.
3. Increased affinity for UC and a willingness to advocate on its behalf among core stakeholders, including students, patients and employees.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
2	<b>Promote public perception and position the university as a trusted partner for Californians through a credible narrative showcasing UC's leadership and the contributions to the future of the state and nation; engendering a sense of community, pride and connection to UC; and positioning UC as an employer of choice with a campaign starting in 2020.</b>					
2a	Develop a strategy and roadmap for a sustained multiyear brand campaign.					
2b	Consult and engage with key internal partners (campuses, locations, UCOP leadership).					
2c	Deploy campaign and integrated events and activities.					
2d	In partnership with UCOP Academic Affairs, develop a welcoming, inclusive experience for prospective UC students and their families starting with UC's early outreach efforts in middle school and extending all the way through application and admission.					
2e	Develop a UC Health digital portal that showcases UC's medical centers as the hospitals of choice for Californians.					
2f	In partnership with UCOP Human Resources, develop a welcoming, inclusive experience for employees and prospective employees that highlights why UC is an employer of choice — this includes generous benefits, a values-driven culture that is stronger because of its diversity, and a genuine concern for employee health and well-being.					
2g	Refresh the University of California's externally facing website to better reflect the Boldly California brand and narrative.					

**Goal: Promote public perception and position the university as a trusted partner for Californians through a credible narrative showcasing UC's contributions to the state and nation; engendering a sense of community, pride and connection to UC; and positioning UC as an employer of choice with a campaign starting in 2020.**

**Assumptions:**

1. UC will fund a multiyear, integrated campaign (\$3M or more).
2. Campuses/locations will support the messaging across their platforms and audiences.
3. Regents and other UCOP leadership will prioritize campaign thematic in their messaging.
4. Medical Centers will align around a unified digital strategy.

**Metrics and Targets:**

1. Improved public perception using comparative data on new market research v. 2018 market research.
2. Increased UCAN signups and other advocacy activity among our key target audiences (Latinx, Urban Voters, College Ed. Voters, Millennials).
3. Increased digital impressions (views/actions/engagements/followers).
4. Increased traffic to University of California website and decreased bounce rate compared to 2019 metrics.

Executing the Mission

Lead: Media Relations

Priority: ■

**Goal: Implement a plan by 2021 to better coordinate and respond to public opinion, uphold public trust, position UC as a thought leader and ignite excitement about our future while positively influencing the university's reputation.**

**Opportunity:** We need to better understand perceptions about the university, track the evolution of important issues in a more organized fashion and develop plans that incorporate these perceptions and issues to more effectively shape public opinion.

**Proposed Solution:** Create, improve and implement tools, structure and mechanisms for coordination and impact within and beyond the division to more effectively uphold the public trust, position UC as a thought leader in state, federal and global spheres, and positively influence the university's reputation by responding to issues and crises, understanding and measuring perceptions about UC, and shaping university priorities through the UC ER&C lens.

**Benefits:**

1. Maximize the positive impact on UC's reputation through the individual and collective work of UC ER&C and in partnership with campuses and other UC entities.
2. Gain tangible insight into perceptions about the university.
3. Identify and leverage opportunities to advance UC's priorities and reputation.
4. Respond quickly, effectively and transparently to unfavorable developments and crises. Better define and track metrics of our communications.
5. Use information about public opinion and metrics on our efforts to assess and guide our plans of our communications efforts.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
3	<b>Implement a plan by 2021 to better coordinate and respond to public opinion, uphold public trust, position UC as a thought leader and positively influence the university's reputation in partnership with campuses and other UC entities.</b>					
3a	Establish a baseline and metrics by which to understand and measure perceptions of UC.					
3b	Establish a baseline and metrics to assess internal and external communications efforts.					
3c	Develop a plan to inform UC ER&C's work through information on perceptions of UC and use OP communications metrics.					
3d	Assess whether the plan has led to a change in perception of UC by opinion leaders, informed public and voters.					

**Goal: Implement a plan by 2021 to better coordinate and respond to public opinion, uphold public trust, position UC as a thought leader and positively influence the university's reputation in partnership with campuses and other UC entities.**

**Assumptions:**

1. We can monitor and plan for certain issues and crises, while others can be managed effectively in real time.
2. We have the ability to significantly impact the reputation of the university.
3. Our efforts significantly impact the university.

**Metrics and Targets:**

1. Market research and surveys as warranted.
2. Established metrics (i.e., press release views, social media reach, number of positive/negative articles for particular issue).
3. Feedback from internal and external stakeholders.
4. Our own assessment of influence with respect to a particular project or issue.

# UC ER&C GOAL # 4

## Grow and Activate UC Advocates

Policy & Advocacy

Lead: Marketing Communications

Priority: ●

**Goal:** Grow a broad base of UC supporters who are willing to take action in support of the university’s fiscal, policy and organizational goals at both the state and federal level by 2024.

**Opportunity:** Higher education generally, and UC specifically, have not harnessed the power of our supporters in a visible, influential or large-scale way. Our 2 million diverse alumni combined with urban, college-educated, millennial and Latinx voters form a strong, pro-higher education base that UC should cultivate as advocates who are willing to speak out about UC’s critical importance to the state and the nation. Faculty, staff, administrators and retirees are another large untapped population that could help advance UC’s priorities and goals at the state and federal level, as are students, families and patients. With this strong foundation, we will be set to grow beyond these audiences in 2024.

**Proposed Solution:** UC ER&C, in partnership with campuses and other UC entities, will develop audience-specific programs, events and outreach activities that build affinity for UC’s work, value and mission, and activate these key audiences to support UC in a meaningful, effective and concrete way.

**Benefits:**

1. Build stronger affinity for UC by cultivating and growing targeted audiences to champion the value of higher education and UC’s contributions to the state.
2. Deeper understanding of UC’s contributions and value.
3. Increased connection between UC and its key constituents.
4. Make UC an influencer on the public stage via its closest allies.
5. Develop an informed and engaged public that takes action to support and advance UC’s priorities.
6. Showcase UC’s diverse leadership around high visibility issues.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
4	<b>Grow a broad base of UC supporters who are willing to take action in support of the university’s fiscal, policy and organizational goals at both the state and federal level by 2024.</b>					
4a	Grow our activatable UCAN advocates list through paid outreach, leveraging cross-channel and cross-program awareness-building, and develop metrics on key campaigns to grow and activate potential advocates during high-visibility issues.					
4b	Develop overarching alumni cultivation strategy, including targeted paid outreach and our nascent alumni career network outreach to include ongoing relationship-building and activation on behalf of UC for Sacramento and D.C. events.					
4c	Develop GOTV and other voter engagement tactics and project plan by December 2019 for the state budget and presidential election, which will serve as foundations for ongoing civic engagement efforts.					
4d	Develop campus alignment regarding advocacy strategies and tactics — specifically among marketing, social, development, alumni and government relations colleagues.					
4e	Develop strategic plan for outreach and cultivation for UC faculty, staff, administrators and retirees.					
4f	Develop engagement plan, in collaboration with UC medical centers, for patient-centric outreach.					
4g	Continue to build and grow UC ambassador program, as well as improve relationships with student government.					

**Goal:** Grow a broad base of UC supporters who are willing to take action in support of the university's fiscal, policy and organizational goals at both the state and federal level by 2024 in partnership with campuses and other UC entities.

**Assumptions:**

1. Clear agreement about advocacy messaging and tactics internally at UCOP and across the system.
2. Clear divisional priorities that allow us to focus on highest value work for maximum impact. (i.e., Goal 1)
3. Campuses/locations and medical centers support our advocacy infrastructure efforts and activate their audiences on UC's behalf.
4. Governmental Relations is an active participant in strategic planning on federal and state issues.
5. UC leadership actively supports governmental relations and advocacy in advancing UC's priorities.
6. Ongoing funding for grassroots advocates.

**Metrics and Targets:**

1. UCAN growth 50 percent year over year (YOY) from 2018 through 2023-24.
2. Growth of Alumni Career Network by 50 percent YOY from 2018 through 2023-24.
3. Number of signups for UC's GOTV app in March & Nov. 2020.
4. Established targets for UCAN growth and engagement among specific constituencies (students and families, faculty, staff, alumni, retirees etc.).

# UC ER&C GOAL # 5

## Cultivate and Engage Key Legislators and Influencers

Policy & Advocacy

Lead: Governmental Relations

Priority: ●

**Goal: Cultivate strong partnerships with key legislators and influencers to lay the foundation for increasing state and federal UC support by the end of calendar year 2024 in partnership with campuses and other UC entities.**

**Opportunity:**

UC continues to experience funding and reputational challenges and frequent criticism from legislators and policymakers, yet has the opportunity to cultivate supporters that could help make UC’s case to these legislators. It is imperative for UC to strengthen its relationships, credibility and perceived trustworthiness to bolster support from government leaders.

**Proposed Solution:**

UC ER&C will reach out to and engage internal stakeholders on the Board of Regents, UCOP, the campuses, academic medical centers, UC ANR and the labs to achieve alignment on UC ER&C objectives. UC ER&C will prioritize and direct resources toward advocating to the most influential state and federal policy makers, including elected officials, business leaders, donors, alumni and public audiences, and redirect resources away from strategies and activities that do not move us toward our goals.

**Benefits:**

1. Agreement from valued internal partners will provide UC ER&C with positions and messages that engage stakeholders in support of UC.
2. Narrowing our focus on our most influential external supporters will enhance opportunities for increased resources for UC, including state and federal fiscal and policy support.
3. Internal stakeholders such as patients, students, staff and faculty will be more inclined to advocate for UC on policy and budget issues.
4. This will lay the groundwork for a broad base of support that puts UC ER&C in the position of driving state and national conversations on key government relations issues facing UC.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
5	<b>Cultivate strong partnerships with key legislators and influencers to lay the foundation for increasing state and federal UC support by the end of calendar year 2024 in partnership with campuses and other UC entities.</b>					
5a	Develop an overview of challenges and issues that our external partners can help solve, and seek their agreement with our efforts.					
5b	Identify the top 10-20 leaders in Sacramento and Washington, D.C., who impact state and federal resources for UC. Develop targeted plans to cultivate them and align on objectives.					
5c	Develop and deploy a business community engagement plan, including convening a grass tops “kitchen cabinet” comprised of pro-UC business leaders and other highly connected UC allies to help influence state and federal policy on UC’s behalf, with first grass tops planning meetings starting in November 2019.					
5d	Update and activate SGR’s Regents Engagement Plan.					
5e	Develop and activate a donor and alumni engagement plan in concert with Institutional Advancement & Alumni Relations, utilizing relationship management tools.					
5f	Develop and activate a proactive media plan to positively influence key audiences and stakeholders.					

**Goal: Cultivate strong partnerships with key legislators and influencers to lay the foundation for increasing state and federal UC support by the end of calendar year 2024 in partnership with campuses and other UC entities.**

**Assumptions:**

1. UC leadership recognizes the critical and valuable role that state and federal investments have in achieving UC's mission.
2. UCOP leaders bring UC ER&C in as strategic partners to move UC in a direction that is viewed favorably by UC ER&C stakeholders.
3. Regents, UCOP and campus leadership support UC ER&C's focus on key stakeholders and targeted policy makers, donors and public audiences, and enable us to shed certain functions that are ancillary to our core purpose.
4. External conditions — economy, scandal, natural disaster — must not eclipse the ability of the state and federal government, donor community or advocates to provide and express support for UC.

**Metrics and Targets:**

1. Positive changes in the way UC addresses major challenges to receiving support, both internal and external (labor, view of UCOP, media coverage, collaborative partnerships at UCOP.)
2. Increased membership, audiences and participation in UCAN advocacy on behalf of higher education, research and health care.
3. Favorable actions by our donors, alumni and public audiences toward achieving our key operational, legislative and fiscal priorities.
4. Support from state and federal policy makers for our operational, legislative and fiscal priorities.
5. Fewer concerns based on misunderstandings or that are unjustifiably raised by outside stakeholders about UC: our value, mission, policies, funding model, labor and compensation practices, diversity, internal organization, admissions, graduation rates, autonomy and role in California.

# UC ER&C GOAL # 6

## Advance UC Priorities at the State and Federal Level

Policy & Advocacy

Lead: Governmental Relations

Priority: ●

**Goal: Advance UC’s mission by activating internal and external partners and leadership to effectively advocate on the university’s higher education, research, health care, operational and fiscal policies and priorities between now and 2024 in partnership with campuses and other UC entities.**

**Opportunity:**

Federal, state, private, institutional and public support is critical to UC achieving its mission. The university’s multiyear framework calls for producing 200,000 more UC degrees by 2030, eliminating graduation gaps and investing in the next generation of faculty and research. Increased support and investment across targeted audiences is needed for the university to fulfill its mission and achieve the vision and priorities of the multiyear framework.

**Proposed Solution:**

Building on the work across UC ER&C goals related to elevating UC’s Boldly Californian brand, growing and activating UC advocates, and cultivating and engaging key legislators and influencers, UC ER&C will develop plans and strategies, including activation of key audiences, to protect and advance UC’s federal and state policies and priorities.

**Benefits:**

1. Increased financial and policy support at the state and federal levels.
2. Increased engagement and activation among targeted audiences, including advocates, policy makers, the business community and the public.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
6	<b>Advance UC’s mission by activating internal and external partners and leadership to effectively advocate on the university’s higher education, research, health care, operational and fiscal policies and priorities between now and 2024 in partnership with campuses and other UC entities.</b>					
6a	Based on the outreach and support garnered through progress in UC ER&C goals related to elevating UC’s Boldly Californian brand, growing and activating UC advocates, and cultivating and engaging key legislators and influencers, activate key leadership and engage external (including UC’s Advocacy Network and media, etc.) and internal constituencies to advance and protect UC’s priorities.					
6b	Annually evaluate plan and current political environment and policy, and calibrate plan and strategies as needed.					

**Goal: Advance UC's mission by activating internal and external partners and leadership to effectively advocate on the university's higher education, research, health care, operational and fiscal policies and priorities between now and 2024 in partnership with campuses and other UC entities.**

**Assumptions:**

1. State and federal support is available for UC's education, research, health care and operational enterprise to function and thrive.
2. UC is brought in as a partner to solve state and federal challenges.
3. External and internal budgetary and political conditions have a profound effect on the federal and state policy and fiscal landscape.
4. University leadership actively supports governmental relations and advocacy in advancing UC's priorities.

**Metrics and Targets:**

1. Increased support from state and federal policymakers for sustained and robust funding.
2. Favorable actions in support of UC priorities.
3. Reduced number of bills introduced (or advanced) or policymaker/agency actions that are onerous and not aligned with UC's priorities.
4. Overall increase in positive communications and support from state and federal policymakers as evidenced by words and actions.

# UC ER&C GOAL # 7

## Attract, Retain and Develop Diverse Talent

People

Lead: UC ER&C Immediate Office

Priority: ■

**Goal:** Improve our ability to attract, retain and develop a diverse workforce with the contemporary skills needed to achieve all aspects of the UC ER&C mission, vision and goals starting in early 2020.

**Opportunity:** In light of rapid changes in how people consume information, the strategies and tactics used by HR and UC ER&C need to evolve in order for the division to attract and retain and develop diverse, creative and inspired employees. This includes tapping into an applicant's sense of mission, having clear and division-specific practices for onboarding and making new employees feel welcome, conducting regular assessments about job satisfaction, and supporting professional development efforts that spark insights and enhance individual and departmental skillsets.

**Proposed Solution:** In order to support the mission of UC ER&C, the division needs to attract, retain and develop diverse talent with contemporary skills in state and federal government relations, legislative analysis, constituent engagement, internal, labor, external, executive and health communications, and marketing communications. This goal will be executed through four strategies:

1. Promote open positions in channels followed by talent who have the necessary skills but are not actively job hunting;
2. Strengthen and formalize on-boarding processes to better orient employees to their areas;
3. Establish a cross-department workgroup to conduct benchmark and tracking surveys about job satisfaction and solicit employee feedback; and
4. Connect significant work activities to the mission-driven mindset of employees so that they see they are having a meaningful impact and are recognized.

**Benefits:**

1. By tailoring the channel to the position type, a deeper pool of qualified applicants will be reached.
2. By emphasizing the motivational elements in job postings, UC ER&C is more likely to attract change-agents with a passion to try new things and make a difference.
3. By implementing post-hire onboarding practices, offering cross-training opportunities, providing funds for professional development and conducting benchmark and tracking surveys, UC ER&C will be aware of morale challenges earlier and be better positioned to resolve issues. In some cases, we may be able to preempt issues through some of these strategies.

#	Goal/Key Strategies & Timeline	19-20	20-21	21-22	22-23	23-24
7	<b>Improve our ability to attract, retain and develop a diverse workforce with the contemporary skills needed to achieve all aspects of the UC ER&amp;C mission, vision and goals starting in early 2020.</b>					
7a	Develop a roster of “position types” within UC ER&C and solicit input about communication channels so positions can be listed in those outlets as they become available.					
7b	Establish a divisional workgroup to “own” certain activities in 2020, such as implementing structured onboarding processes, creating cross-training opportunities and providing support for professional development opportunities.					
7c	Develop a survey tool to be deployed 2x annually to establish a benchmark and monitor trends in job satisfaction.					

**Goal: Improve our ability to attract, retain and develop a diverse workforce with the contemporary skills needed to achieve all aspects of the UC ER&C mission, vision and goals starting in early 2020.**

**Assumptions:**

1. A roster of current and projected position types can be developed in a way that aligns with communication channels available.
2. UCOP HR is open to partnering with UC ER&C on aspects of the role that can be elevated, so as to appeal to applicants who are motivated by the university's mission. Although the foundational elements of a position description may not change, how the position is described externally would be subject to tweaking.
3. SVP of UC ER&C and UCOP leadership are willing to consider feedback and ideas from workgroup.
4. Division employees are willing to put in the time and effort to identify issues and work with other UCOP partners to formulate solutions.
5. UCOP department heads are willing to consider "exchange programs" to allow employees from other departments to learn new skills.
6. UCOP HR is open to exploring minor changes to HR practices as well as potentially complex policy changes.

**Metrics and Targets:**

1. Completion of a roster of job types, with corresponding professional associations, job boards, newsletters, online groups that are used by people in that field.
2. Increased employee diversity within the division.
3. New and improved skills among division employees.
4. Heightened sense of job satisfaction among division employees.

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# UC ER&C Strategic Plan Communication & Monitoring Plans

# Communication Plan

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Communication of the UC ER&C Strategic Plan is closely linked to delivery of Goal 1's "roadshow" and will be aligned strategically. Additional communication plans include:

## *UC ER&C Staff Communication*

- UC ER&C leadership will share and discuss the final strategic plan with their staff during the week of January 13, 2020.
- UC ER&C leadership will provide an overview at the all-hands staff meeting on January 28, 2020.

## *UCOP Stakeholder Communication*

- UC ER&C leadership will update UCOP division leadership on December 13, 2019.
- UC ER&C leadership may provide overviews to UCOP division chiefs of staff and leadership in advance of the "roadshows" to be scheduled later in 2020. Goal 1 implementation will include planning for these stakeholders.

## *Campus/Location Stakeholder Communication*

- UC ER&C will provide an overview to campus MarComm and Media staff and AVC leadership in April 2020.
- UC ER&C will provide in-person overviews to campus Vice Chancellors and Government Relations Directors in the first quarter of 2020.

# Monitoring Plan

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Progress on the goals within the UC ER&C Strategic Plan will be reviewed as follows:

## *Internal Review*

Progress will be reviewed at the standing ER&C Division Leadership meetings, starting in February 2020.

- A Smartsheet with goals and key strategies will be created prior to the first reporting period, and include automated reporting reminders and links for Goal Owners.
- Every 6 weeks, Goal Owners will report progress on key strategies using the Smartsheet tool. Goal updates will include current status, obstacles, top accomplishments, and planned key deliverables for the next reporting period.
- Goal updates will be discussed at the next scheduled ER&C Division Leadership meeting, held every 3 weeks.

## *Annual Review*

The UC ER&C Strategic Planning Team will convene annually to review progress and refresh the plan. Progress updates will be provided annually to the President.

## *5-Year Renewal*

The UC ER&C Strategic Planning Team will convene before the end of year 5 of the plan to review progress and renew the plan for the next 5-year period. The renewed strategic plan will be communicated in the same manner as the original plan.

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# Appendix A: UCOP Strategic Framework

# UCOP Mission

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**Through leadership, service, and programs, we optimize the power of the University system to deliver world-class education, research, public service and health care to Californians, the nation, and the world.**

**Our Cause**  
**Who? What? Where?**

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**Our Actions**  
**What we do**

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**Our Impact**  
**Changes for the better**

# UCOP Vision

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## *Vision*

UCOP will sustain and strengthen the University of California's position as the pre-eminent university system in the world.

### ❖ *Vivid Description*

By 2030, 200,000 additional students will receive UC degrees with 90% graduating within 4 years. We will eliminate equity gaps in degree attainment and achieve a student body that reflects the diversity of California. We will continue to advance innovative student financial support to maximize affordability. We will create a strategy for providing lifelong learning opportunities for UC students and other Californians. Expanded community engagement and research activities will ensure that UC delivers knowledge and solutions to the entire state. By 2030, UC will make significant investments to have safe, state-of-the-art buildings and infrastructure that support education, health care, research, and student activities. More than 60% of our students, both graduate and undergraduate, will be housed on UC campuses. In order to support this growth, we will further diversify our revenue streams through innovative investment models, unrestricted philanthropy, clinical revenue, technology commercialization, and programs that leverage our size and scale. We will have a strong and wide base of support and be esteemed and considered indispensable by the state legislature, alumni, faculty, students, industry leaders, and the public. UCOP will continue to recruit and retain top talent as a mission-driven organization of agile, risk-taking, and strategic professionals who care deeply about people, our planet, and our shared future. We will be a diverse, collaborative community of individuals dedicated to sustaining UC as the best university system in the world.

# UCOP Core Values

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## 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.

## 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.

## 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.

## MISSION DRIVEN

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

## 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.



# UCOP Strategic Objectives

The following five strategic objectives are broad-based, long-term aims that will move UCOP towards actualizing its vision. These core objectives are included, as applicable, in each division's strategic plan.

<b>People</b>	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
<b>Financial Stability</b>	Ensure financial strength of the University through sustainable and innovative financial models with efficient and effective financial management practices
<b>Operational Excellence</b>	Optimize delivery of programs and services through systemwide implementation of best practices that promote efficiency, effectiveness, health, safety, confidence, and quality
<b>Policy &amp; Advocacy</b>	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
<b>Executing the Mission</b>	Enhance UC's ability to create and disseminate innovative research, scholarship, and opportunity through teaching, public service, and engagement for the benefit of California, the nation, and the world

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# Appendix B: Goal Summary Components

# Goal Summary Component Definitions

Each goal within the strategic plan has a corresponding two-page summary that outlines the following:

COMPONENT	DEFINITION
<b>Goal Statement</b>	Specific, quantifiable, realistic targets that will move the division toward accomplishing a strategic objective over a specified period of time
<b>Opportunity</b>	Describes the purpose/motivation behind achieving the goal
<b>Proposed Solution</b>	Defines scope and objectives
<b>Benefits</b>	Outlines the benefits that will be derived from achieving this goal
<b>Key Strategies</b>	Key activities/steps required to achieve the goal
<b>Assumptions</b>	Defines processes/events that must happen/“go right” (usually outside the department’s direct control) in order for this goal to be successfully achieved
<b>Metrics and Targets</b>	Outlines how success will be measured with associated desired targets
<b>Lead Department/Owner</b>	Lists department and person(s) who will be accountable for progress on this goal
<b>Priority</b>	<p>Color-coded ratings are assigned to each goal to illustrate relative impact and urgency. These ratings may also carry implications regarding precedence for short-term resource allocation.</p> <ul style="list-style-type: none"> <li>● : High impact and/or high urgency</li> <li>■ : High/moderate impact and moderate urgency</li> <li>◆ : High/moderate impact and less urgency</li> </ul>