The input below came from meetings with Andrew Comrie and Tom Miller and the feedback from heads and directors at the Retreat. It is organized in three themes—development, sustainability, and diversity. At the end of the document is one business item for us to consider and some suggestions for additional topics.

As you read please jot down ideas for sessions and activities that we might hold. Please bring these ideas to the meeting on Monday.

### Donor Development

- Building a donor pipeline
- Communicating with, cultivating, and stewarding donors
- Working with your development team
- How to tell your story
- Making an ask
- Integrating department and college development priorities

Vicki Fleischer at UAF is dynamic and supportive and has been doing a lot in terms of development training sessions but most of the focus is on deans and directors. It would be great to tailor a program for heads (and faculty) with her help. It might be good to have case studies to present and discuss (Patrick Lyons offered to talk about the Arizona State Museum's development efforts and what has been working for his unit).

“Development Workshop for Department Heads and their College/Unit’s Development Officer”
Friday, October 14, 12-2 pm (confirm with Vicki)
Doug Stewart

From Vicki Fleischer: Doug will briefly review the key messages from the prior trainings and then build upon those in this session. That way folks who are new Department Heads and/or did not attend the training last semester could attend and get up to speed from Doug’s brief review. And, those who did participate in the February and/or March sessions would not feel this was a repeat of those sessions. We are thinking of this as a Development for Department Heads 2.0. Further, as we did in the prior sessions, we’re recommend inviting development officers to join department heads at this training sessions, so they can take what is learned and put it into action after the training.

Meet with John-Paul Roczniak + Vicki Fleischer + Clint McCall to organize activity.
http://www.uafoundation.org/about/contact/directory.shtml
How does donor development work? The basics.
Roll of the back office. Supports finding and contacting potential donors and tracking them. Support the Development officers in units. Give heads an idea of what the back office team does. Talk to Jenny Flynn and Emily Walsh.

Structure and plan of attack.
Roles of department heads and directors and College donor officers.

Consider a breakout session with the donor officers and department heads from the same college.

Input from Heads at Retreat:

- "The Ask" (book to read)
- Working the development team. Role of dept chair
- Bring in dept chair deans who have success stories
- Better process for dealing with small donors (what is being done to streamline). What is the relationship between college development officers and the foundation. Bring someone from the foundation to talk about their partnership model. Repeat the making the ask workshop they did recently at the foundation and gift center. Hear from successful department heads (re: donor cultivation and fundraising).
- Who has ownership of development? Center or dean? Can development be more collaborative across campus
- Building a donor pipeline. Integrating development and college development priorities. Creating positioning statements.
- What are our resources to do this?
- There are competing pressures for getting access to our donors.
- How will a $3 billion UA fund campaign affect colleges and units.
- (how can units influence the flow of funds from any general campaign)?
- Creating a development plan? Resources, templates of good plans, etc.
- We'd like to have professional training on donor development.
- We'd also like to hear from successful dept. heads on this issue.
- Discussion of how to balance college, unit, and foundation needs, yet still be proactive.
- Better communication between development officer and head.
- Developing a fundraising infrastructure at the university, college, and unit levels.
- How much time should department heads and faculty spend on fundraising"
Sustainability: Positioning UA for a strong future

- Budgeting
- Developing a long-term salary plan
- Hiring and recruitment
- Retention

The thought here is that it would be good for the central administration, deans, and heads to all be thinking long-term, to do better planning. The problem is, of course, that we are all busy dealing with the latest urgent issues ("whack-a-mole"). The key is tying the importance of long-term planning to those urgent issues, like hiring, salaries, retention, and budgets. We want all UA leaders to budget long-term for salary increases, especially when hiring. We envision a conversation between the Provost, deans, and heads. The heads would be represented by a long-term unit leader who has modeled sustainability in terms of balancing investments, hiring, and raises. This leader could address challenges and make suggestions for other heads, the Provost, and the deans.

Fundamentals are providing students with a quality education and creating new knowledge. Everything we do goes to support these two primary activities. Never Settle plan contains these elements.

Budget planning.
RCM + 1 year.
Macro version working because revenue is rising.

Invite heads to serve on a panel that are from across the spectrum. Given them leadership challenges or case studies and ask them for their perspective and input. Include budgets, donor development, personnel issues. What additional information would you like to know?

Frame activities over the course of the academic year to shape expectations.
What are some smart ways to behave as a department? Consider inviting Lisa Rulney from Engr.
Find heads that are institutionally aware. Ask the Deans at the Dean’s council.

How are taxes determined and set? Invite Jim Florian and Andrew Comrie. Set for September or October timeframe.

Administrative bloat. Invite Lynn Nadel.
Input from Heads at Retreat:

- Sustainability
- Workshop on RCM
  - drill down to colleges and departments
  - compare notes and best practices
  - focus on incentives impact

- Who and how to set a development plan for salary. Alison V or model to support hires and retention
- New buildings/space
- Workshop on strategies for junior faculty retention (e.g. Mentorship, 30/60/90 day onboarding, etc.). Strategies for intervention when there is a risk of a faculty departure. Strategies for salary increase/discussion instead of counter offers (acknowledge value of faculty members throughout the year).
- Ebb and flow of enrollment impacts budgets, thus, need a cushion of about 10-20% to allow for this.
- This applies to retention packages too.
- All of the above. How to deal with conflict between long term hiring plan and merit increases. Examine trade-offs and synergies between the four suggestions listed. Examine these topics relative to the UA strategic plan.
- Tying salary adjustments to Consumer Price Index? A university expectation?
- Shared laboratory space, shared equipment
- University page to connect resources and needs like a Craig's list for UA folks
- There's tension between supporting the existing faculty and recruiting new. How can we do a better job of supporting our existing faculty? Should this be a university expectation/function?"
- We endorse Diane Austin's suggestion of getting dept. Heads input before rolling out policies.
- Keeping heads involved in an ongoing fashion is VIP so that sometimes we collaborate rather than just hear mandates.
- Early guidance for the next two years in terms of the mandated raises.
- Will UA vitae continue to be the method of faculty APR?
- Input to prioritization and plans for building renovations, how can we do this in most efficient and coordinated fashion?"
- Improving the climate across campus and within departments
- Child care
Diversity and Inclusion

- The benefits of diversity
- The changing demography of Arizona and UA
- Creating an environment that supports student, faculty, and staff retention

Diversity and Inclusion

- Best practices in hiring and retaining diverse faculty
- Interact with diversity officers from practice/industry/employers

Where we are in terms of demography: UA’s incoming freshman class will be 40% minority and Arizona will be a "minority-majority" state in six or seven years. We have disproportionately low retention of African-American and Native American students. How do we address this? Undergraduates are part of the pipeline that leads to grad students and faculty members. If we don't do well with undergrads, it affects grads and faculty in terms of recruitment and retention. We are not doing well now in terms of retaining minority faculty.

Lynn Nadel—faculty listening tours and Diversity Task Force.
Rebecca Tsosie.
Jesus Trevino.
Tom Miller. Laura Hunter.
Helena Rodriguez.

Input from Heads at Retreat:

- Why inclusionary excellence pays off Or Mircroaggression, emotional intelligence, unconscious bias
- How to/best practices
- Guidance
- Continue the conversation with Jesus. Graduate student recruitment from underrepresented groups, especially in STEM. Support a diverse population of graduate students (e.g. funding, sustainable funding throughout their time here - esp for social sciences, support system is critical).
- The benefits of diversity. Tips on how to defuse a volatile situation. Increasing faculty awareness of strategies for being more inclusive in the classroom. Raining on communicating the importance of diversity to your staff.
- We support these efforts and look forward to more information about them.
- Invite diversity task force to speak to heads
- Diversity should be part of orientation
Business

The UA Diversity Task Force crafted statements on mature content, pronoun and name use, and inclusion to include in syllabi. Lynn Nadel asked if we could gather feedback from heads on how many syllabi include this language. Thoughts?

Other topics and suggestions

HeadsUp should focus on productively and non-combatively engaging the "levers of power" at UA. It would be good to meet with CFO Goldman, for example, for an open but non-adversarial discussion of RCM.

Jon Chorover suggested a session on conflict resolution. He contacted Caitlan Hendrickson who is the Ombuds Program Director, who suggested that she and Chris Segrin (Co-Chair of Ombuds Program Committee and Dept. Head of Communication) run an activity.

Ombuds program combine with management tips— Allison Vaillancourt would do a great job—and include experienced heads. Learn from one another. Karen Seat in Classics is a good person to invite.

RCM is an opportunity to regroup as a department and make a plan.
  o What’s our role in the department?
  o What do we value as a department?
  o Roles can shift over the years and that’s ok as long as everyone contributes and respects the contributions of others.
  o Have a positive discussion about what you want to accomplish as a department.
  o Not big brother watching over.
  o What can Department heads use to motivate their units? What data should be shared and which not? Could be a panel where questions are sent ahead of time so that panelists can give some thought to the question.
  o Department as a team. College as a team. University as a team. What departments have this vision? Ask the Deans.
  o How do we get faculty to work together and make decisions that are in the best interests of the team? How do we do this on a college level? Department A gets 2 faculty hires this year and Department B gets 0. Does Department B complain or respond by supporting A knowing that they will get their hires when they make a strong argument.
  o How do we build capacity in the units to weather the ups and downs that will invariably come?