



UCLA ADVOCACY PROGRAM: *A PLAN FOR ACTION*

Advocacy Program Mid-Year Update Report

In the summer of 2004, Government & Community Relations (G&CR) began to think about Advocacy issues and approaches in new and different ways. The goal was to build a more successful and impactful program. Over the course of several months, G&CR broadened the internal discussions regarding elevating Advocacy from a G&CR priority to an External Affairs (EA) priority. Critical feedback and involvement by Development, Alumni Relations, Communications, FIM and the UCLA Foundation contributed to the development of the *UCLA Advocacy Program: A Plan for Action* in November 2004. The overall goal of the UCLA Advocacy Program is to:

Implement an effective advocacy program to build support for UCLA.

The UCLA Advocacy Plan is a working document that while reinforcing the successful elements of the existing campus advocacy efforts also seeks to move UCLA advocacy in new directions to address new challenges. The rationale for re-thinking the UCLA Advocacy Program was necessitated by the ever-changing political environment that UCLA must operate within, particularly in Sacramento. The reality of term limits have not only had a dramatic impact on the state legislature, but has also brought change to local Los Angeles politics at the Mayoral and City Council level. While term limits has less impact at the federal level, it is still a factor, as former members of the legislature tend to move on to Congress.

In November 2006, 22 of the 35 legislative seats assigned to UCLA G&CR, and potentially several more seats depending on retirements or resignations to run for other legislative offices, will be on the ballot. The magnitude of this unprecedented turnover is solely due to term limits. The need of the University to sustain and increase state and federal support in a constrained budget climate makes building and cultivating positive, supportive relationships with elected officials at all levels of government even more important. Advocacy provides a strategy to nurture those important relationships by ensuring that the right advocate is delivering the right message to the right elected official about the University. To do so effectively, requires broad interdepartmental collaboration by each of the units in External Affairs.

The *Advocacy Program Mid-Year Update Report* has been developed to assess progress toward the goal and objectives set forth in the UCLA Advocacy Plan from January – June 2005. The report assesses successes, tasks completed and tasks yet to be done. It also describes the priorities for the next six months that will need to be completed to reach the overall program goal and objectives.

The objectives and action steps for implementation of the UCLA Advocacy Plan are as follows:

OBJECTIVE # 1 – INCREASE “A” AND “A+” LEVEL CONTACTS FOR ASSIGNED FEDERAL, STATE, AND LOCAL ELECTED OFFICIALS

The defining characteristic of an “A” level contact is the quality of the relationship with the elected official. The relationship must be personal, the volunteer must be credible to the elected official and most importantly, the volunteer must have access to the member.

Action Step 1: G&CR Advocacy staff will work with Development Research and UCLA Foundation staff members to determine which major campus donors are also major political donors or those donors whose personal interests coincide with elected officials.

Completion Date: *COMPLETED*

Responsibility: G&CR Advocacy Program Staff

G&CR Advocacy staff have identified and cross-referenced the Top 100 UCLA Donors for political contribution information. There were 40 donors prioritized and a discussion took place between Vice Chancellor Michael Eicher and Assistant Vice Chancellor Parker and Associate Vice Chancellor Turteltaub. GCR managers were given an overview of PMATS and will be trained on preparing PMATS contact reports. Outreach and cultivation of new potential “A” level contacts will begin shortly thereafter. Criteria for contact and contact protocols have been established between Development and GCR.

Action Step 2: Upon identification of high potential “A” level contacts, G&CR managers, in conjunction with Development and UCLA Foundation staff members, will design a cultivation strategy to engage the new advocates.

Completion Date: *JANUARY 2005/ONGOING*

Responsibility: G&CR Managers

The topic for the February 28, 2005, EA Senior Staff Meeting was the UCLA Advocacy Program Plan. The Vice Chancellor-External Affairs and each of the EA-AVCs introduced sections of the UCLA Advocacy Plan. G&CR Managers facilitated discussion with EA Senior staff on Advocacy issues. Participants were divided into four workgroups, with each workgroup assigned to a specific goal of the Advocacy Program. The workgroup teams were comprised of members from each EA unit.

The workgroup discussions focused on the four objectives of the UCLA Advocacy Plan:

- Increasing A and A+ contacts
- Increasing grassroots advocates
- More effective communication with volunteer advocates
- Ongoing training for volunteer advocates

Out of the initial discussions, there have been follow-up meetings with the workgroups. Their ongoing work will refine components of the overall plan. Each of the G&CR

Managers is responsible for leading these ongoing discussions with their EA colleagues. An ancillary benefit of the EA Senior Staff workgroups has been to make Advocacy a more visible issue within EA, so that it is not simply a G&CR responsibility. The interdepartmental approach leverages the collective strengths of EA. The interdepartmental collaborations between the EA units have been strengthened significantly.

In relation to Action Step #2, the focus of the workgroup discussion on developing more “A” level contacts reinforced the need for G&CR to work more closely with Development. The tentative plan calls for the following:

- A. Share details of Donor/Elected contact with development via information systems
- B. Systematically look at volunteer boards in Professional Schools
- C. Compare top political donors from campaign lists to UCLA donor lists
- D. Schedule meetings between G&CR and Development on a quarterly basis to discuss the cultivation of donors for political advocacy
- E. Provide Development with a list of political and subject matter priorities in order to cultivate faculty “A” contacts
- F. Work with Corporate Foundation and Research Relations to identify corporate leaders among vendors, recruiters, and contractors

The workgroup has held one follow-up meeting, with another meeting scheduled for September 2005. Additionally, Associate Vice Chancellor Turtleaub has met with the G&CR managers to discuss donor contact issues. In May 2005, Development staff provided a PMATS demonstration to the G&CR managers.

Action Step 3: A member of the G&CR management team will initiate the contact with the new “A” level advocates, including faculty members, for engagement with a specific elected official(s) or a specific issue(s).

Completion Date: *JANUARY 2005 FOR INITIAL CONTACT / ONGOING FOR ENGAGEMENT*

Responsibility: G&CR Managers

Several of the G&CR Managers have initiated their work with potential “A” level contacts through telephone calls, lunch meetings, and other personal contacts, however, there is still much to be done in this area. Some of the accomplishments thus far are:

- Inclusion of “A” contacts in UCLA delegations for advocacy days in Sacramento and Washington, D.C. in May 2005
- Invitation to “A” contacts to attend the July 2005 reception with Mayor Antonio Villaraigosa
- Invitation to participate as delegates for UCLA Day with Local Government.

- Engagement with the new mayor by suggesting personnel from the campus for the transition team.
- Contact with Bill Rosendahl, newly elected member of the Los Angeles City Council, who is a client of one of our “A” contacts.
- Connect with a potential “A” contact with an “A+” contact for more exposure and mentoring

Action Step 4: In conjunction with both the Vice Chancellor-External Affairs and the Associate Vice Chancellor-Development, the Assistant Vice Chancellor-G&CR will develop a cultivation strategy to engage selective Competitiveness Council members in advocacy activities.

Completion Date: *COMPLETED*

Responsibility: AVC-G&CR

Ongoing discussions are being held with the Vice Chancellor-External Affairs and the Associate Vice Chancellor-Development regarding cultivation strategies for members of the Chancellor’s Competitiveness Council. Discussions focused on individual approaches to engage each member in future Advocacy efforts. In January and February 2005, the AVC-G&CR met with several members of the Competitiveness Council regarding their potential participation in the Corporate Advocacy Day. Those members that were not available for the 2005 Corporate Advocacy Day due to scheduling conflicts, committed to participating in other high-level advocacy activities.

Action Step 5: The Assistant Vice Chancellor-G&CR will initiate the contact with the Competitiveness Council member(s) for engagement with a specific elected official(s) or a specific issue.

Completion Date: *COMPLETED*

Responsibility: AVC-G&CR

On April 12, 2005, the second annual Corporate Advocacy Day was held in Sacramento. Three members of the Competitiveness Council, Dr. Henry Samueli, Mr. Richard Ziman, and Mr. Richard Bergman participated in the Corporate Advocacy Day. Additionally, several other members of the Council indicated a willingness to participate, but had scheduling conflicts with the April 12th date. At the May Competitiveness Council meeting, the Corporate Advocacy Day was debriefed and a summary report was distributed. As follow-up, G&CR will look for other Advocacy opportunities that offer appropriate high-level engagement for other council members.

Action Step 6: The Assistant Vice Chancellor-G&CR will initiate discussions with Development senior staff to identify potential advocates from members of the Professional Schools Advisory Boards/Boards of Visitors.

Completion Date: *NOT COMPLETED*

Responsibility: AVC-G&CR

This Action Step will require further work and is not completed at this point in time.

A preliminary discussion has been held with the Associate Vice Chancellor-Development and other senior Development staff to identify potential advocates from the Professional Schools Advisory Boards/Boards of Visitors. G&CR Advocacy Program staff have been provided with lists of members of the Advisory Boards/Boards of Visitors by Development staff. Currently, an analysis is being done to determine which board members are already political donors at the local, state, or federal level. Additionally, G&CR staff also will examine if there are causes or issues that Board members financially support that may be high priorities for certain elected officials. Once a shorter list of prospects has been identified, the AVC-G&CR will meet again with Development Senior Staff to determine the most appropriate strategy for engagement. For FY05-06, there will be a number of advocacy-related activities to provide opportunities for participation and involvement. In addition to the UCLA/UC Days in Los Angeles, Sacramento, and Washington, high-level advocates will be asked to participate in other activities such as Corporate Advocacy Day, individual or small group meetings with their political contacts, or to potentially co-host an advocacy event.

OBJECTIVE # 2 -- INCREASE THE NUMBER OF GRASSROOTS VOLUNTEERS IN RELATION TO POLITICAL AND GEOGRAPHIC DIVERSITY

In the current environment of term limits, there is an ongoing need to recruit new volunteers that not only reflect ethnic and gender diversity but also political and geographic diversity as well.

Action Step 7: Continue the Regional Advocacy efforts by G&CR staff to build greater visibility for the campus and to recruit new advocates from throughout the greater Los Angeles region.

Completion Date: *ONGOING*

Responsibility: G&CR Advocacy Program Staff and G&CR Assistant Directors

There is ongoing activity in the nine designated regions in Los Angeles County staffed by the G&CR Assistant Directors. Materials have been sent to Bruin Caucus members and other key volunteers within their respective regions. Candidate Forums for local and state offices in Council District 14 and potentially in Assembly District 53 will take place in the coming months and will be the focus in regional planning.

G&CR Assistant Directors are engaging in personal contacts with volunteers from each of their regions. As G&CR staff receive notices or invitations, volunteers in the regions have been contacted regarding events that are sponsored by or for their elected officials. Several UCLA volunteers are now serving on district committees regarding education and health issues. Additionally, volunteers continue to join G&CR staff selected community events and dinners.

The EA Senior Staff workgroup that focused on increasing the number of grassroots advocates has proposed a number of ideas for implementation. They include the following activities:

- A. Building a broad-based education campaign that targets the campus on why advocacy is important.
- B. Placing "blurbs" on various website homepages with the capability of a "click here" button to invite viewers to get involved.
- C. Reviewing the Alumni Association's strategic plan which has an objective to increase the number of advocates.
- D. Considering non-alumni, non-donors such as:
 - a) UCLA in LA Grant Recipients,
 - b) friendly neighbors,
 - c) non-alumni staff,
- E. Messages to the different groups/audiences need to be targeted. The messages should not be one size fits all.
- F. An intermediary tool for volunteer matching is the "Volunteer Skills and Interests Assessment."
- G. Utilize vehicles to drive people to the websites are:
 - a) Alumni Association has a monthly email to approximately 120,000 that is both regionally targeted and segmented to a young alumni group.
 - b) Development will be sending a postcard out in January announcing the end of the campaign and that a "short tagline" message could be included.

Action Step 8: Continue partnerships with Alumni Relations and the Center for Community Partnerships to recruit new alumni advocates and community-based organization leaders as advocates on behalf of the University.

Completion Date: *ONGOING*

Responsibility: G&CR Advocacy Program Staff /AVC-G&CR

With the elimination of the Alumni Association's Government Relations Alumni Advocacy Committee (GRAAC), monthly meetings will be held between Association and GCR Advocacy Program Staff. The elimination of GRAAC does not mean an elimination of alumni involvement as volunteer advocates. A new committee structure will be established to continue the cultivation and development of key volunteers for GCR. Recruitment for the committee will be based on active participation in Advocacy events throughout the year. Based on the Regional Advocacy model currently in place, G&CR Assistant Directors will have an opportunity to invite a maximum of two regional volunteers for participation on the committee, ideally, one volunteer would be a veteran and the second a volunteer who is relatively new and interested in learning how to be a key advocate. An additional five to seven volunteers will be invited based on their long-standing advocacy commitment, through past service on GRAAC or within the Alumni Association. Using this criterion, there could potentially be 23 to 25 members of the new Advocacy Committee. There will be a two-year term limit with a "participation review" at the end of the first year.

Service on the committee will include:

- Commitment to participate in one of the three "UCLA Days".
- Becoming active volunteers with local legislative officeholders and giving consideration to becoming a political donor.
- Recruiting volunteers from their region to join Bruin Caucus.

- Serving as a “host” for GCR events and activities as well as developing a “volunteer-led” event or program with minimal assistance from GCR.
- Participating in Advocacy Workshops and Delegate Training programs.

Committee members will be kept informed via electronic communication. In addition, there will be two calendared meetings per year with additional times scheduled if necessary. Bi-monthly thirty-minute conference call appointments will be scheduled with agendas sent in advance.

The new “Bruin Caucus Orientation” program has been very successful. Sessions were held on December 10, 2004 and April 30, 2005. Attendance averaged approximately 50 participants, primarily composed of new volunteers who had no prior advocacy involvement. The sessions also contained “veteran” volunteers who served as small group facilitators. The next orientation will be held in September 2005.

The advent of the GetActive campaign in Spring 2004 facilitated the recruitment of a substantial number of new alumni volunteers for the UC budget advocacy efforts. The merger of alumni who signed up for the GetActive campaign with the existing Bruin Caucus database has increased the number of volunteers in the Bruin Caucus database from 700 to more than 2,500 participants. Since January 2005, there have been six communications sent to GetActive members regarding budget updates and legislative mobilizations.

Action Step 9: G&CR Advocacy Program and Alumni Relations staff will collaborate on developing a plan to increase alumni participation in the GetActive campaign.

Completion Date: *INITIAL PHASE COMPLETED/ONGOING*

Responsibility: G&CR Advocacy Program Staff

Volunteers who have signed up for the GetActive campaign have been identified in Advance and invited to participate in the “Bruin Caucus Orientation” program. The GetActive group has been folded into the existing “Bruin Caucus” volunteer group. Volunteers are being invited to all GCR and Regional Advocacy events. During the upcoming months, G&CR will distribute a Bruin Caucus newsletter to keep volunteers more informed on governmental relations issues.

Action Step 10: G&CR Advocacy Program, Student Affairs and Alumni Relations staff will collaborate on developing a plan to recruit UCLA faculty, staff, student and other key volunteers to participate in the GetActive campaign.

Completion Date: *NOT COMPLETED*

Responsibility: G&CR Advocacy Program Staff

G&CR Advocacy staff have met with Alumni Relations staff and Student Affairs. A formal proposal is being put together for Tom Lifka, Assistant Vice Chancellor, Student Academic Services, to review with regard to the use of student data. A GetActive! message was sent out from Dr. Kathleen Komar, the outgoing Chair of the Academic Senate to faculty for advocacy involvement. There were four faculty respondents that signed up to be included in

the database. In the Fall 2005 Quarter, a second letter will go out to faculty from the incoming Senate Chair.

Action Step 11: Establish an External Affairs work team composed of representation from G&CR, Alumni Relations, and University Communications to develop a plan on increasing the use and impact of the GetActive tool.

Completion Date: *NOT COMPLETED*

Responsibility: G&CR Advocacy Program Staff

The Alumni Association has already begun to develop regional strategies over the last few months and in Fall 2005 will convene quarterly meetings between the Alumni Association, G&CR and Development to communicate and identify needs, as well as share information (such as contacts) across units.

There is now a GetActive Team in place and a quarterly Bruin Caucus Newsletter will soon be released utilizing the GetActive software. G&CR staff have been working with University Communications staff to develop the Bruin Caucus newsletter.

OBJECTIVE # 3 -- DEVELOP COMMUNICATION VEHICLES TO EDUCATE AND MOTIVATE VOLUNTEERS

Information is the lifeblood of a successful advocacy program. Ongoing communication with advocates will not only enable them to articulate UCLA messages more effectively, but will sustain the volunteer cultivation.

Action Step 12: G&CR Advocacy Program staff will consult with University Communications on ideas to revive and disseminate the Bruin Caucus newsletter to volunteers.

Completion Date: *NOT COMPLETED*

Responsibility: G&CR Advocacy Program Staff

The Bruin Caucus Newsletter will be released following the launch of the new GCR web site. The newsletter will be designed to “push” volunteers to the GCR site as well as other campus groups involved in GetActive. The tentative outline for the newsletter will include a volunteer spotlight, calendar of events, “hot” news, and unit updates.

Action Step 13: G&CR Advocacy Program staff will consult with Alumni Relations and University Communications on incorporating advocacy updates in Alumni Association and Communications publications.

Completion Date: *NOT COMPLETED*

Responsibility: G&CR Advocacy Program Staff

During the past year, there has been ongoing communication and discussion about placing GCR and Advocacy news updates in EA publications and communication vehicles. A number of items have been placed regarding legislative issues, G&CR events, and the state budget.

The EA Senior Staff Communications Workgroup has not reconvened since their initial meeting. The next meeting will include the new *UCLA Magazine* editor and the new director of Institutional Communications. The group discussion will focus on how to more effectively communicate advocacy messages.

Action Step 14: G&CR Advocacy Program staff will consult with Alumni Relations staff to increase the number of accurate e-mail addresses for alumni advocates in the Get Active and Bruin Caucus databases.

Completion Date: INITIAL PHASE COMPLETED/ONGOING

Responsibility: G&CR Advocacy Program Staff

The initial step has been completed. All GetActive and Bruin Caucus volunteers are now in one group in Advance. Updates on e-mail, address and other alumni information is maintained by Advance. “Bounce-back” e-mails are to be removed periodically.

Action Step 15: G&CR Advocacy Program staff will coordinate the production and dissemination of an electronic Advocacy Newsletter.

Completion Date: NOT COMPLETED

Responsibility: *G&CR Advocacy Program Staff*

The Advocacy newsletter team is in place and coordinating the release of the newsletter after the launch of the redesigned GCR Web Site. The elements of the initial edition of the Bruin Caucus Newsletter are described in Action Step 12.

OBJECTIVE # 4 -- PROVIDE PERIODIC, TARGETED TRAINING TO VOLUNTEERS

In addition to increasing the level of communication with advocates, there is a need to provide additional training for volunteers to ensure that they have the appropriate skill set to deliver UCLA messages to elected officials.

Action Step 16: G&CR managers in conjunction with colleagues from Alumni Relations, University Communications, and the Government Relations Alumni Advocacy Committee (GRAAC) committee will review and recommend modifications to the overall advocacy training efforts.

Completion Date: NOT COMPLETED

Responsibility: G&CR Managers

This action step is not yet completed. There is no longer a formal GRAAC committee. The G&CR Manager’s along with other EA colleagues have not yet met to review the volunteer training efforts currently underway. During the Fall Quarter the EA Senior Staff Workgroup on Volunteer Training and Recruitment will begin their assessment of current training efforts.

Action Step 17: G&CR Advocacy Program staff will develop quarterly training programs targeted for Bruin Caucus and GetActive participants.

Completion Date: *QUARTERLY/ONGOING*

Responsibility: G&CR Advocacy Program Staff

From the February 2005 EA Senior Staff Meeting, G&CR managers Kim Savage and Manny Baldenegro will be scheduling a follow-up meeting with the EA workgroup to continue the brainstorming discussion on volunteer training and recruitment. The initial workgroup discussion focused on the following items:

1. Web-Based Presentations:
 - a. On-line discussion forum
 - b. On-line follow-up (prompts and reminders)
 - c. Web Newsletter

2. Recruitment Opportunities:
 - a. Annual Fund - Regional Organizations
 - b. Bruin Parents - Parents Weekend (2,500 people)
 - c. Young Alumni - 33k invitations. (1,900 people)
 - d. Board of Directors and Campaign Cabinet

The EA workgroup proposed a shift in focus from “Who Can Be an Advocate to “You are an Advocate”.

The third Bruin Caucus Orientation scheduled for September 2005 will focus on UCLA community programs within the nine Regional Advocacy areas. The orientations have proven successful and have been well-attended.

G&CR Calendar Update

There are set events and milestones that are a part of the annual G&CR advocacy calendar. These events include the participation of the Chancellor, the Deans, members of the campus leadership, the faculty, donors, alumni, students, industry partners and other key volunteers. The *italicized* events while not UC or UCLA-sponsored are important milestones in the annual advocacy calendar.

January 2005

- Chancellor Carnesale Sacramento Trip
- *Release of Governor's FY 2005-06 State Budget*
- School of Public Affairs Day in City Hall
- UC Health Advocacy Day in Sacramento
- Advocacy Training Workshop

COMPLETED

January 25

February 4

January 21

January 29

February 2005

- UC Day In Sacramento
- Executive Vice Chancellor Neuman Sacramento Trip
- Council District #11 Candidate Forum
- *Release of the President's FY 2006 Federal Budget*

February 15

March 1

February 8

March 2005

- *Los Angeles Municipal Primary Election*
- Executive Vice Chancellor Neuman Washington, D.C. Trip *Canceled*
- *Approval of the Congressional Budget*
- Bruin Caucus Orientation Program

April 30

April 2005

- Corporate Advocacy/Industry Leader Sacramento Trip
- Chancellor Carnesale Washington, D.C. Trip
- *Humanities on the Hill Day in Washington, D.C.*
- *Congressional Appropriations Process*

April 12

April 19 – 20

May 2005

- UCLA Day in Washington, D.C.
- *Release of May Revision of the Governor's FY 2005-06 State Budget*
- *National Science Foundation (NSF) Day in Washington, D.C.*
- UC Chancellor's "Budget Blitz" in Sacramento
- UC Advocacy Day in Sacramento
- *Congressional Appropriations Process*

May 24 – 26

Canceled

May 18

June 2005

- *Los Angeles Municipal General Election*
- *Department of Defense (DOD) Day in Washington, D.C.*
- *Congressional Appropriations Process*

July 2005

- *Congressional Appropriations Process*
- *State Budget Bill signed by Governor*
- Bruin Caucus Orientation Program: *Moved to September 2005 to accommodate community partners*

August 2005

- *Congressional Appropriations Process*

September 2005

- *Congressional Appropriations Process*

October 2005

- Bruin Caucus Orientation Program

November 2005

- UCLA Day with Local Government

December 2005

- UCLA Advocacy Program Evaluation Report

ADVOCACY PRIORITIES JULY – DECEMBER 2005

G&CR staff and managers will continue to provide overall support and leadership for the UCLA Advocacy Plan. In the period July – December 2005, the priorities for the implementation of the UCLA Advocacy Plan are as follows:

- 1. Continue to identify, cultivate and engage “A” and “A+” contacts.** The ongoing need for a core of highly placed advocates cannot be overstated. Partnerships among the EA units have been extremely helpful in developing the current base of volunteers. G&CR will look to develop other venues for high-level engagement of “A” and “A+” contacts. G&CR managers will participate in PMATS training.
- 2. Disseminate the Bruin Caucus Newsletter and implement other proposed communication strategies to keep volunteers well informed on advocacy issues.** This will be a major priority for the remainder of the year. It is critical that more effective communication tools are developed and utilized with volunteers. The GetActive campaign, G&CR website, EA publications and the Bruin Caucus newsletter are all vital to this effort.
- 3. Continue to convene the EA Advocacy Workgroups.** The EA Advocacy Workgroups are important to maintaining Advocacy as an EA priority. The interdepartmental collaboration has already brought new ideas, approaches and resources to the overall advocacy efforts. The interdepartmental workgroups must

continue to stay engaged in advocacy issues. The Advocacy Plan Mid-Year Report will also be shared with these EA colleagues.