Advancement Committee Meeting

Oct 14, 2020 1:00 PM - 1:45 PM EDT

Table of Contents

I. Agenda....2
II. Minutes of the August 12, 2020 meeting....3
III. Reports....7
    A. Discussion Advancement Committee Chairman’s Report....7
IV. New Business....14
    A. INFO-1 UCF Health 2020 Digital Marketing Update....14

UNIVERSITY OF CENTRAL FLORIDA

Board of Trustees
Advancement Committee
Virtual Meeting
October 14, 2020, 1:00-1:45 p.m.

Livestream:
https://ucf.webex.com/ucf/onstage/g.php?MTID=e9fad901541ee53dbafd22e17689542d9
Conference call number: 1-408-418-9388, access code: 132 372 8242

AGENDA

1.	Call to Order	Danny Gaekwad, C*hair, Advancement Committee*
2.	Roll Call	Lauren Ferguson, *Director, Foundation Board Relations and Development*
3.	Minutes of the August 12, 2020 meeting	Chair Gaekwad
4.	Reports	
	Discussion	Advancement Committee Chairman's Report *Chair Gaekwad*
5.	New Business	
	INFO-1	UCF Health 2020 Digital Marketing Update *Patrick Burt, Associate Vice President for Communications and Marketing*
6.	Adjournment	Chair Gaekwad

UNIVERSITY OF CENTRAL FLORIDA

Board of Trustees
Advancement Committee Meeting
August 12, 2020
Virtual Meeting

MINUTES

CALL TO ORDER

Trustee Danny Gaekwad, Chair of the Advancement Committee, called the meeting to order at 1:15 p.m. and stated that the meeting was covered by the Florida Sunshine Law and the public and press were invited to attend. Trustee Joseph Conte, Trustee Sabrina La Rosa, Trustee Alex Martins, Trustee David Walsh, Trustee Joseph Harrington and Board Chair Beverly Seay attended via WebEx.

MINUTES

The minutes from the June 17, 2020 meeting were unanimously approved as written.

NEW BUSINESS

Trustee Gaekwad shared the process for the creation of the Advancement Committee's fiscal year '21 annual plan and opened the floor for additional committee member input regarding the document. No additional comments or suggestions for revision were presented by the committee members.

Trustee Gaekwad welcomed Vice President of Government & Community Relations, Janet Owen, to speak about building a coalition for legislative advocacy utilizing the Phone2Action platform. Owen shared that one of President Cartwright's goals was to elevate and promote UCF's excellence and reputation in advancement, community and government relations, and communications and marketing – a goal the Phone2Action infrastructure will assist in moving forward. Owen noted that the Phone2Action platform had recently been procured for a one-year contract through the generous donations of two UCF alumni families. It was shared that the platform would enable UCF alumni and friends to participate in advocacy by connecting them with state and federal elected representatives. Owen noted the features of the Phone2Action platform include an opportunity for UCF to strategically request that alumni and friends advocate on behalf of UCF through coordinated text messaging, emailing, calling, and letter writing activities.

Owen elaborated on the partnership between UCF Advancement's Alumni Engagement and Annual Giving team and the Government and Community Relations office in utilizing the platform for

strategic legislative advocacy. It was noted that Phone2Action would begin its rollout at UCF via the UCF Alumni Board's Advocacy Committee, which was scheduled to meet in September of 2020. During the Advocacy Committee's meeting, additional input regarding the rollout to the larger UCF alumni community would be discussed. Owen noted that she was excited to report back to the Advancement Committee on Phone2Action activities once the platform was up and running.

Trustee Gaekwad shared his approval of utilizing software, such as Phone2Action, due to its capability to quickly push out targeted and pertinent information to a large audience. Trustee Gaekwad commended Owen and Morsberger for their work related to procuring the platform. The platform being the first step toward a more robust advocacy program, was also noted by Trustee Gaekwad. Trustee Gaekwad asked Owen to confirm that Phone2Action was not currently being funded by university funds. Owen and Morsberger confirmed that private philanthropic support from two UCF donors were covering a one-year subscription to the service.

Trustee Conte asked what would be done to highlight elected representatives that are UCF alumni. Owen shared that Phone2Action allows for campaigns to be developed around individual representatives, such as a campaign to encourage notes of congratulations for specific UCF alumni representatives on milestones, such as birthdays. Trustee Conte asked who at UCF would be in control of the Phone2Action software. Owen noted that it would be shared between Alumni Engagement (UCF Advancement) and the Government and Community Relations office. It was noted that the platform would also serve as an opportunity for sharing notable information with alumni, such as university bragging points.

Trustee Martins asked for clarification regarding the duration of the paid Phone2Action contract. Owen confirmed the contract was for a duration of one-year. Trustee Martins encouraged looking for additional funding sources, philanthropic or otherwise, for continuing service past the current one-year contract. Trustee Conte asked for a Phone2Action performance update at a future meeting. Trustee Gaekwad thanked Trustee Martins and Trustee Conte for their comments and advice.

Trustee Gaekwad asked if there were any other Trustees who desired to make a comment regarding the Phone2Action platform. Trustee La Rosa inquired if students would be involved in the process. Owen confirmed that topic was in discussion, specifically former legislative scholars. Owen requested the opportunity to discuss the topic with Trustee La Rosa further in her capacity as SG President.

Trustee Gaekwad welcomed Vice President for Advancement and UCF Foundation CEO, Mike Morsberger, to present on fiscal year '20 fundraising performance and FY21 goal setting. Morsberger shared that the UCF Foundation's fiscal year 2020, which ran from July 1, 2019 - June 30, 2020, concluded with $63.7 million in attainment — 98% of the UCF Foundation's $65 million goal for the fiscal year. A discussion regarding the definition of attainment occurred. Morsberger noted that despite the challenges related to COVID-19, fiscal year 2020 was the third best fundraising year in University history, per the UCF Foundation's current gift counting guidelines.

Morsberger shared that 75% of the funds by use for FY20 fell within the category of current operations – followed by capital use (13%), Endowment (5%) and TBD (7%). Morsberger clarified that the category of TBD accounts for gifts without current designations specified by the respective donor(s).

The percentage of FY20 funds raised by priority was presented by Morsberger. It was noted that the current categories were student success, growth and opportunity, and academic excellence. Morsberger noted these categories were likely to be revised moving into the next campaign. Chair Seay inquired about the process of UCF Advancement coordinating fundraising priorities with the university. Morsberger shared that he, President Cartwright, and Interim Provost Johnson would be meeting with the Deans Council to coordinate needs and priorities. Morsberger also noted that part of the process is matching the needs and aspirations of the university with the philanthropic inclinations of donors. Trustee Gaekwad thanked Chair Seay for her comment. Trustee Conte noted that many donors feel strongly about their philanthropic priorities and may not be moved by a case for university need alone. Morsberger noted that the processes of fundraising is intuitive in many ways, and you do need to be aware of donors' priorities; however, the university's most dedicated supporters are interested in assisting with President Cartwrights goals and priorities through philanthropy. Chair Seay asked for future presentations to pinpoint gaps and funding needs.

Morsberger provided an update of FY20 funds by source, which included corporations, friends, alumni, foundations, and organizations. It was noted that corporations were the largest source of funds for FY20, accounting for 47%. Chair Seay shared the need for identifying university needs, such as a goal for the number of new endowed Chairs. President Cartwright noted upcoming staff meetings to discuss the topic. Trustee Harrington requested comparative fundraising performance metrics utilizing UCF's identified peers. Morsberger noted that data was available regarding metrics such as budget and funds raised, but most institutions were not comfortable with sharing their fundraising strategies – Morsberger noted he would reach out to industry colleagues to discuss.

Morsberger provided information on the top units that met or exceeded fundraising goals in FY20. An overview of the number of gifts processed, donors, and donor visits in FY20 was presented.

Morsberger shared that his team is hard at work wrapping up the planning process for their FY21 goals. This is a process his team completes annually with overall attainment always coming first. The UCF Foundation's four overarching goals for FY21 were:

1. Attainment
2. Efficiencies and effectiveness
3. Planning for the next campaign
4. Diversity & Inclusion

Trustee Martins inquired about when the next campaign may begin. Morsberger noted a launch in FY24 of FY25, but that planning was underway. Trustee Walsh commended Morsberger and the Advancement Team for their proposal closure rate exceeding 50%.

Trustee Gaekwad asked the members of the Advancement Committee if there were any additional items of business to bring forward. No new business was presented.

ADJOURNMENT

Trustee Gaekwad adjourned the meeting at 2:12 p.m.

Reviewed by: _____ Date: _____
Danny Gaekwad, Chair, Advancement Committee

Submitted by: _____ Date: _____
Janet Owen, Associate Corporate Secretary

UCF License Plate Update

October 2020

UCF

Millican Hall
U53
U53
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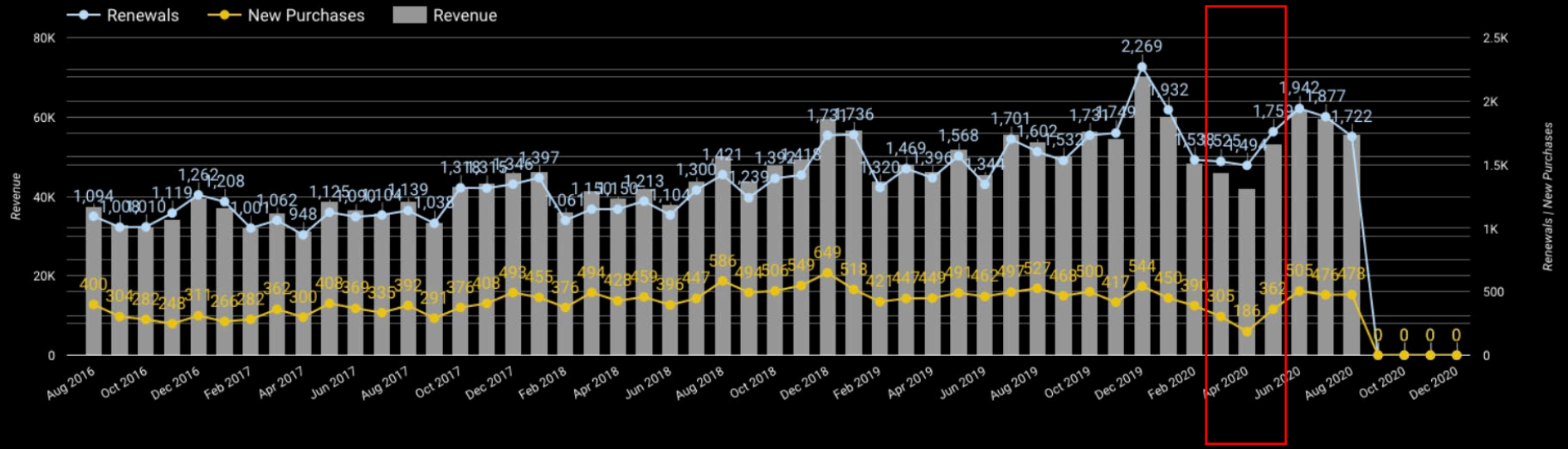
Renewals
New Purchases
Revenue
Revenue
Renewals | New Purchases
80K
60K
40K
20K
0
2.5K
2K
1.5K
1K
500
0
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Oct 2016
Dec 2016
Feb 2017
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Dec 2019
Feb 2020
Apr 2020
Jun 2020
Aug 2020
Oct 2020
Dec 2020

State University License Plates – April 2020		Active Plates
1	University of Florida	94,218
2	Florida State University	71,952
3	University of Central Florida	27,579
4	Florida A&M University	15,924
5	University of South Florida	14,936
6	Florida International University	3,213
7	Florida Atlantic University	2,533
8	Florida Gulf Coast University	1,689
9	University of North Florida	1,677
10	University of West Florida	1,349
11	New College of Florida	902

State University License Plates – October 2020		Active Plates
1	University of Florida	94,578
2	Florida State University	71,966
3	University of Central Florida	29,182
4	Florida A&M University	16,124
5	University of South Florida	15,072
6	Florida International University	3,216
7	Florida Atlantic University	2,558
8	Florida Gulf Coast University	1,688
9	University of North Florida	1,679
10	University of West Florida	1,386
11	New College of Florida	873

Patrick J. Burt
Associate Vice President
UCF Communications and Marketing

Patrick.Burt@ucf.edu

UCF

ITEM: INFO-1

UCF BOARD OF TRUSTEES
Agenda Item Summary
Advancement Committee
October 14, 2020

Title: UCF Health 2020 Digital Marketing Update

☒ **Information** ☐ **Information for upcoming action** ☐ **Action**

Meeting Date for Upcoming Action: N/A

Purpose and Issues to be Considered:
This item is presented for information purposes only and does not require Advancement Committee action. This item relates to President Cartwright's fifth goal for fiscal year 2020-2021:
Elevate and promote UCF's excellence and its national reputation through our efforts in advancement, government and community relations, and communications and marketing efforts.

Background Information:
In November of 2019, the UCF College of Medicine reached out to UCF Communications and Marketing to develop and execute a digital marketing strategy to promote UCF Health. In a collaborative effort, the team developed a two-pronged approach to market select clinic service lines and drive phone and online appointments, and increase awareness for UCF Health in the neighborhoods and communities around each clinic location. Since launching the campaign in January 2020, UCF Health has seen an increase in target performance indicators, resulting in increased community awareness and more patient appointments.

Recommended Action:
N/A

Alternatives to Decision:
N/A

Fiscal Impact and Source of Funding:
N/A

Authority for Board of Trustees Action:
N/A

Contract Reviewed/Approved by General Counsel ☐ **N/A** ☒

Committee Chair or Chair of the Board has approved adding this item to the agenda ☒

Submitted by:
Patrick Burt, Associate Vice President for Communications and Marketing

Supporting Documentation:
Attachment A – UCF Health 2020 Digital Marketing Update

Facilitators/Presenters:
Patrick Burt

UCF Health 2020 Digital Marketing

October 2020

UCF

Collaborative Effort

UCF Health and College of Medicine

- Wendy Sarubbi
- Adam Novak
- Matthew Vaccaro
- Megan Scavo
- Stacey Calhoun
- Danny Cavallo

UCF Communications and Marketing

- Joshua Bedwell
- Michelle Fuentes
- Kim Spencer
- Keri Tessitore

Background and Timeline

- UCF College of Medicine approached Communications and Marketing in November 2019 and planning started
- December 2019: Added new providers the UCF Health online appointment system (Healow)
- January 2020: Began running digital ads mid-January 2020
- February 2020: Started SEO planning and implementation
- March 2020: COVID-19 pandemic forced closure and pivot to telehealth
  - Paid advertising reduced and pivoted to promote telehealth only
  - SEO ramped up to be ready when patient demand returned
- May 2020: Digital ads began to return to planned strategy

Campaign Goals & Objectives

Core Campaign Objectives

1. Increase in core website metrics
2. Increase in telephone appointments
3. Increase in online appointments (new online system - Healow)

Campaign Focus Areas

1. Ophthalmology
2. Primary Care
3. General Awareness (Quadrangle and Lake Nona)
4. Gynecology
5. Dermatology, Rheumatology, Endocrinology (SEO focus)

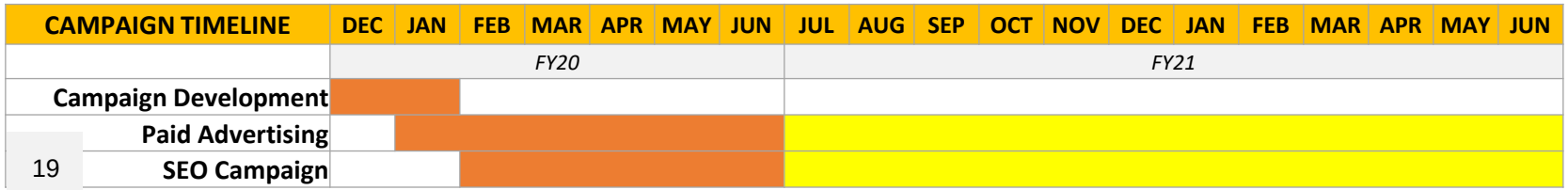
FY21 Strategic Focus – two-prong strategy

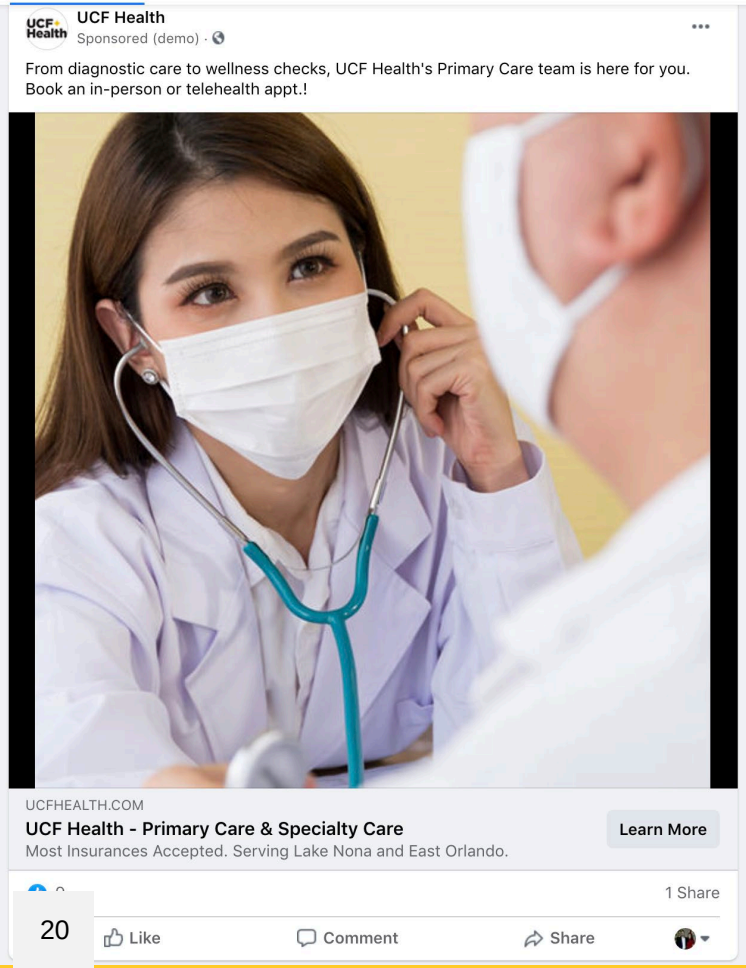
- **Paid Digital Advertising**
  - Utilize a multi-channel approach, including paid search (SEM) and paid social
  - Target patient appointments for select clinic service lines, including Primary Care
  - Focus on direct target audience and conversion rate optimization activities

FY20 (Jan 2020 to Jun 2020) - $50k | FY21 (Jul 2020 to Jun 2021) - $70k

- **Search Engine Optimization (SEO)**
  - Increase the authority of the UCF Health brand digitally
  - Enhance content across clinic specialization areas to boosting rankings
  - Focus on enhanced online visibility and user experience

FY20 (Jan 2020 to Jun 2020) - $38.4k | FY21 (Jul 2020 to Jun 2021) - $30k

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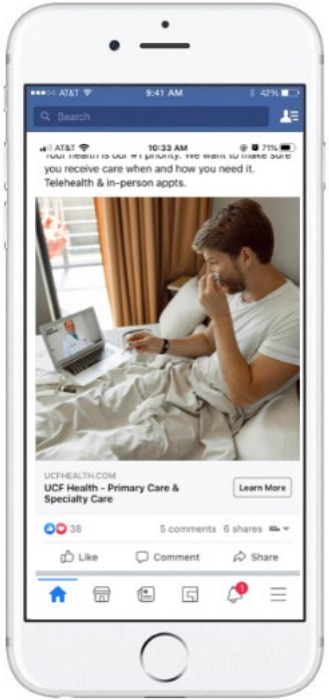
you receive care when and how you need it.
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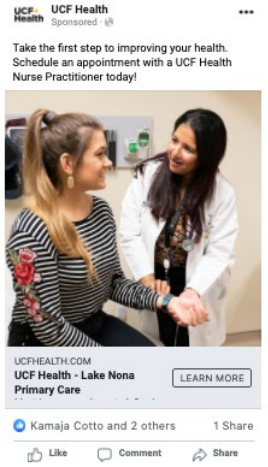
UCF Health
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Take the first step to improving your health. Schedule an appointment with a UCF Health Nurse Practitioner today!
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UCF Health - Lake Nona Primary Care
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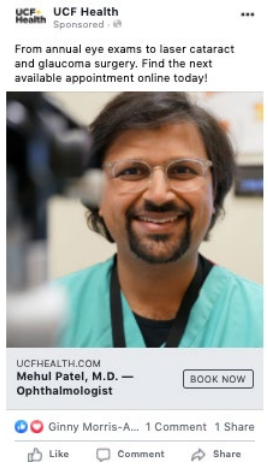
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From annual eye exams to laser cataract and glaucoma surgery. Find the next available appointment online today!
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Mehul Patel, M.D. — Ophthalmologist
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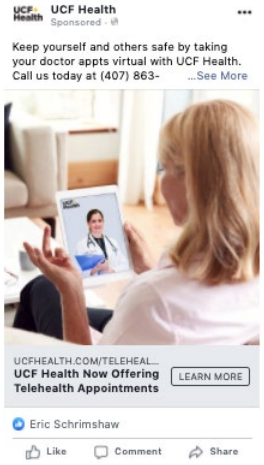
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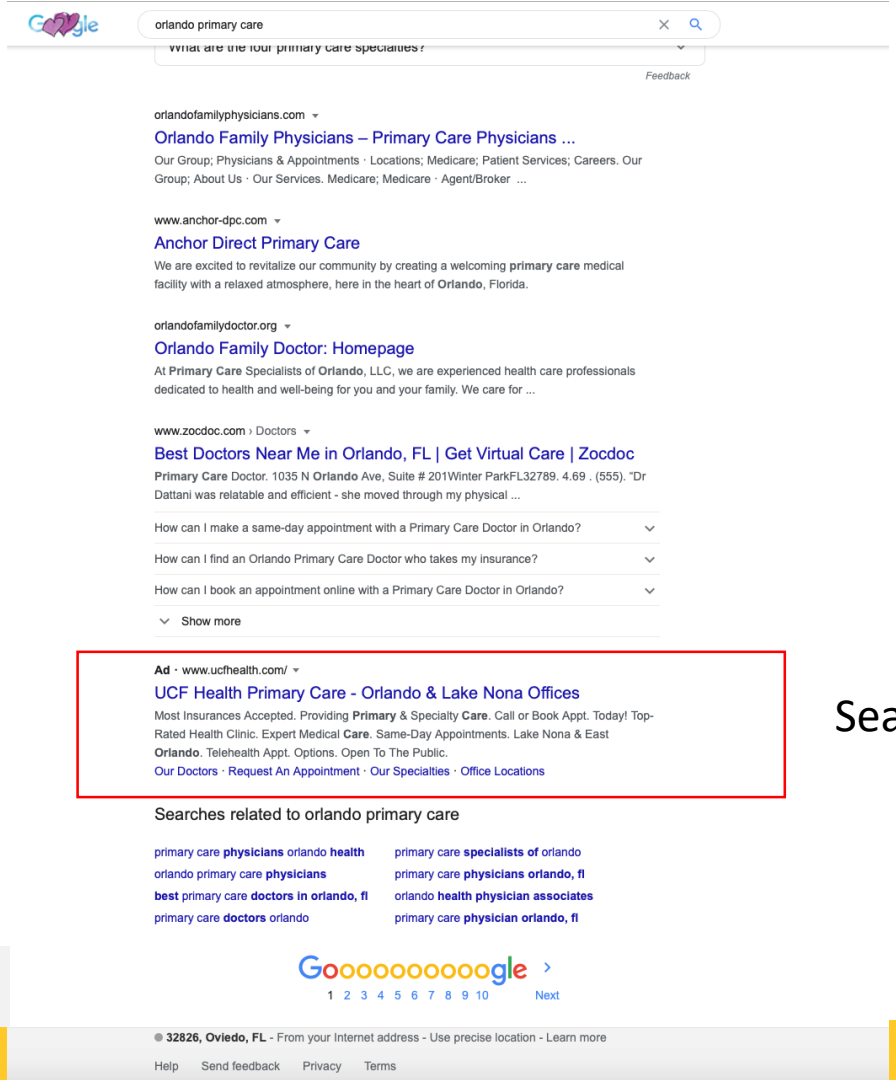


Search Term:

Orlando Primary Care

Search Engine Ad

Campaign Results

	Ophthalmology	General Awareness	Primary Care	Gynecology
Channels	• Facebook • Instagram • Google Search	• Facebook • Instagram • Google Search	• Facebook • Instagram • Google Search	• Facebook • Instagram • Google Search
Core Proposition	• Cataract Surgery • Glaucoma Surgery	• General awareness of UCF Health • Lake Nona clinic	• Nurse Practitioners	• Endometriosis • Menopause • Urogynecology
Campaign Timelines	1/6/20 – 3/11/20 5/20/20 – 6/30/20	1/6/20 – 3/11/20 5/11/20 >	1/6/20 – 3/11/20 5/11/20 >	2/19/20 – 3/11/20
Total Conversions	**295**	**2,434**	**2,218**	**203**
Online Apt. Starts	211	1,647	1,509	172
Phone Calls	84	787	709	31

Campaign Results

JAN-MAR
- Launched campaigns
- Optimized & enhanced ad targeting & creative assets

APR
- Paused paid campaigns
- Pivoted to a Search Engine Optimization (SEO) strategy

MAY >
- Re-commenced paid campaigns
- Refined target audience segments
- Enhanced SEO activities

5,503,575
Total Impressions

5,150
Total Actions Taken

=

3,539
Total Online Appointment Starts

+

1,611
Total Phone Calls

*Re[illegible]hieved by 9/17

COVID-19: Strategy Pivot to SEO

- Phase 1 (FY20) SEO Plan & Strategy
  - Objectives:
    1. Optimize the website and its content to align with patient search intent, and be 100% Google compliant
    2. Transform UCF Health services into content hubs by creating service specific content that increases relevance and drives traffic
    3. Rank for highly-relevant, localized search terms through the implementation of a local SEO strategy
    4. Increase search ranking power of key service landing pages through targeted link building
  - Deliverables:
    - Full website audit and optimization recommendations (desktop and mobile)
    - Service hub content creation (40 new content pieces)
    - Core link building activities (40 quality links)
  - SEO Goals:
    - Increase YoY Overall Site Organic Traffic +20% by the end of Phase 1
    - Increase YoY Service Hub Organic Traffic +45% by the end of Phase 1
    - Move Average Site Rank by a minimum of 15 positions by the end of Phase 1

COVID-19: Strategy Pivot to SEO

UNIVERSITY OF CENTRAL FLORIDA | UCF SIGN IN + | Search UCF

UCF Health
COLLEGE OF MEDICINE PRACTICE

UCF Health Services | Our Doctors | Locations | New Patients | Patient Portal | Schedule Appointment

Schedule Online
Call 407-266-3627
Incoming Referrals

Check Insurance

We accept most major insurance plans.

Check Insurance

New Patient Forms

If you are a new patient, save time by printing your paperwork and bring it to your appointment.

New Patient Forms

Health Questionnaire

Ask Your Doctor A Question

Established patients can use our Patient Portal to ask your doctor a question, request

HOME » UCF HEALTH SERVICES » OPHTHALMOLOGIST IN ORLANDO

Ophthalmologist in Orlando

Our comprehensive services in ophthalmology at our Lake Nona office include the treatment of many eye diseases, such as cataracts, glaucoma, macular degeneration, diabetic eye disease, uveitis, dry eye and screening for medication-induced retinal toxicity.

Schedule An Appointment

Our Orlando ophthalmologist works closely with other specialists, including our geriatricians, rheumatologists, dermatologists, endocrinologists and primary care physicians to provide thorough eye care for all patients.

Schedule an appointment with your UCF eye doctor in Lake Nona today!

At UCF Health, our top priorities are patient education and the utmost quality of patient care. Our goal is to provide you with the knowledge and solutions that enable you to live your greatest quality of life.

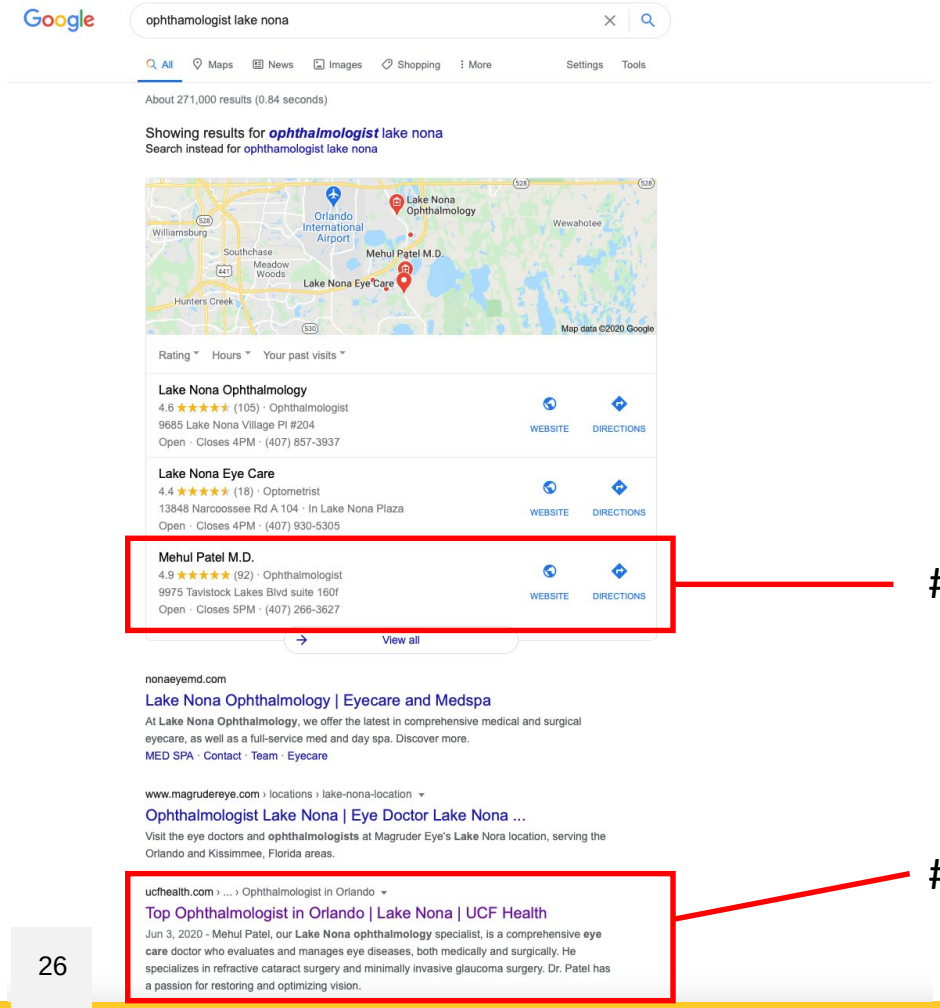
Our Lake Nona eye doctor understands the delicacy and complexity of the eye as well as the importance of preserving optimal vision for as long as possible. We use state-of-the-art technologies and perform a number of minimally-invasive procedures to bring you effective treatments and efficient results in ophthalmology.

Our Ophthalmology Services in Lake Nona

General Eye Exams

During a general eye exam, our UCF eye doctor will complete a comprehensive examination of the eyes. This exam includes a vision check and an array of tests to assess the overall health of the eye. Many of these general exam tests are also performed to assess

UCF



Search Term:

Ophthalmologist Lake Nona

#3 Ranking in doctors

#3 Ranking in results

COVID-19: Strategic Pivot to SEO Results

Core Website Metrics

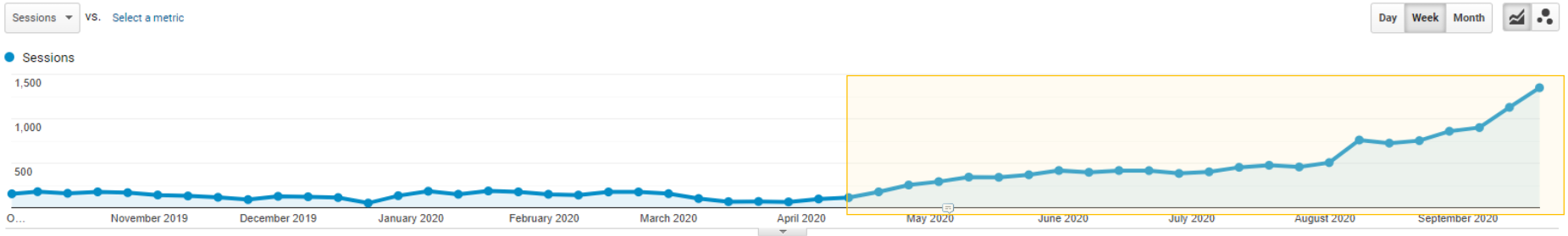
- Examples of service-specific website page improvements:

Service Page Examples	May-Aug 2019 Organic Traffic	May-Aug 2020 Organic Traffic	% Change
Ophthalmology	131	547	**+317%**
Family Medicine	24	490	**+1,941%**
Rheumatology	371	1,852	**+399%**
Endocrinology	114	573	**+370%**
Internal Medicine	62	263	**+324%**

COVID-19: Strategic Pivot to SEO Results

Core Website Metrics

- Improvement Highlights (May–Sep)
  - +297% YoY increase in organic traffic to “Our Services” landing pages
  - +46% YoY increase in overall site organic traffic



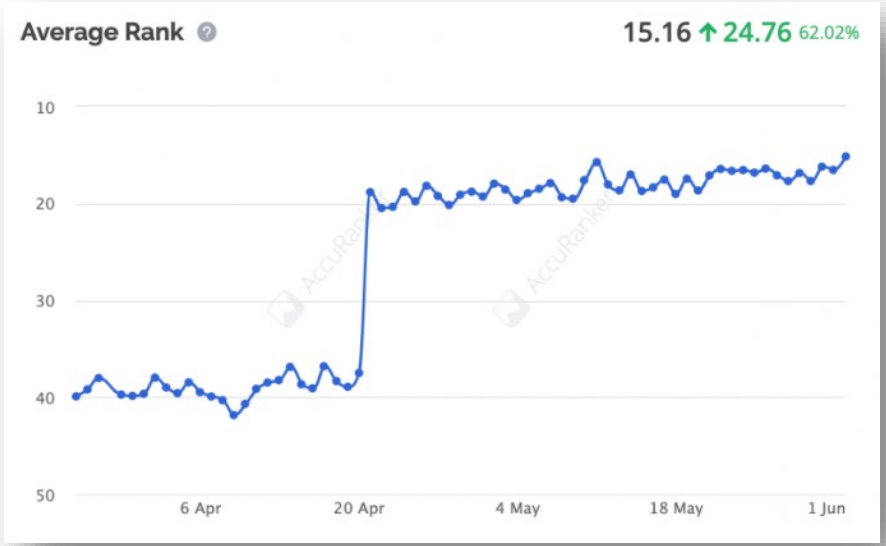
SEO Activities Commenced

COVID-19: Strategic Pivot to SEO Results

Website Rankings

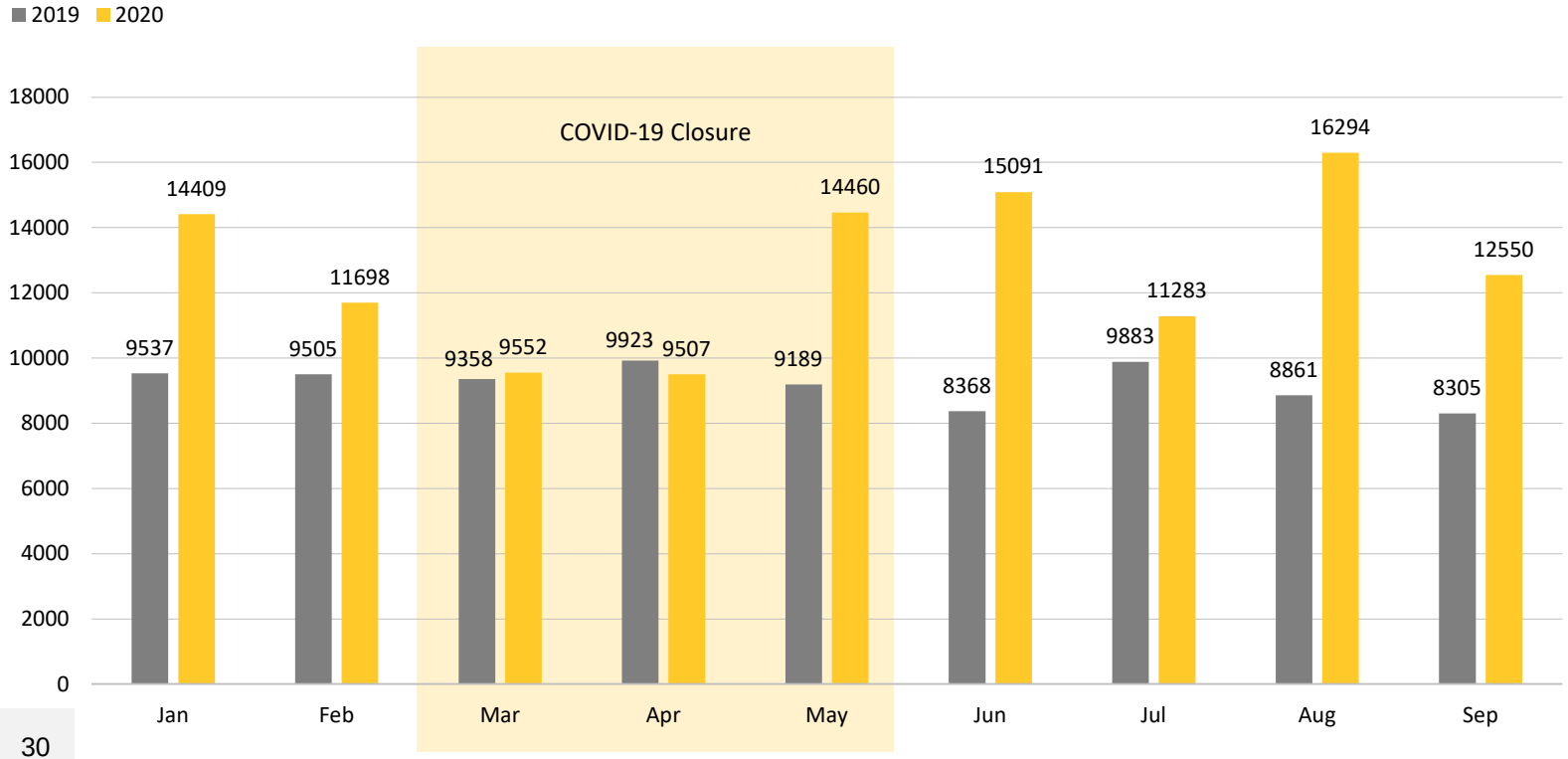
- Examples of improvements in keyword ranks:

Keyword	Apr 2020 Rank	Sep 2020 Rank	Search Volume
rheumatologist orlando	14	3	880
endocrinologist orlando	24	4	880
cosmetic dermatology orlando	28	2	50
general surgeon	20	10	18.1k
ophthalmologist orlando	42	3	590
orlando internal medicine	52	10	320
family physician orlando	50	10	6,600
dermatologist orlando	34	3	2,400



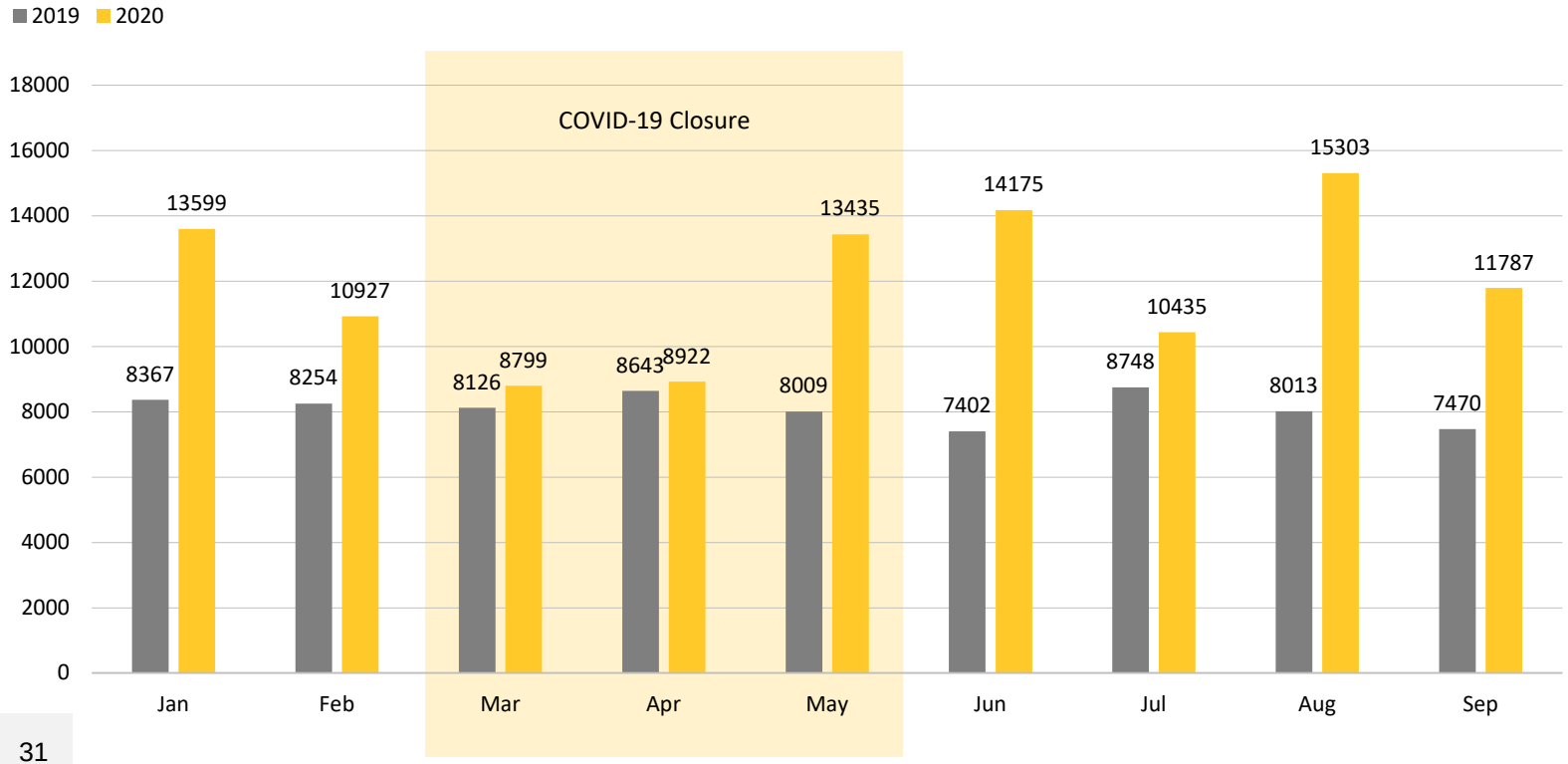
Campaign Results

Website Users: Jan-Sept 2019 vs Jan-Sept 2020



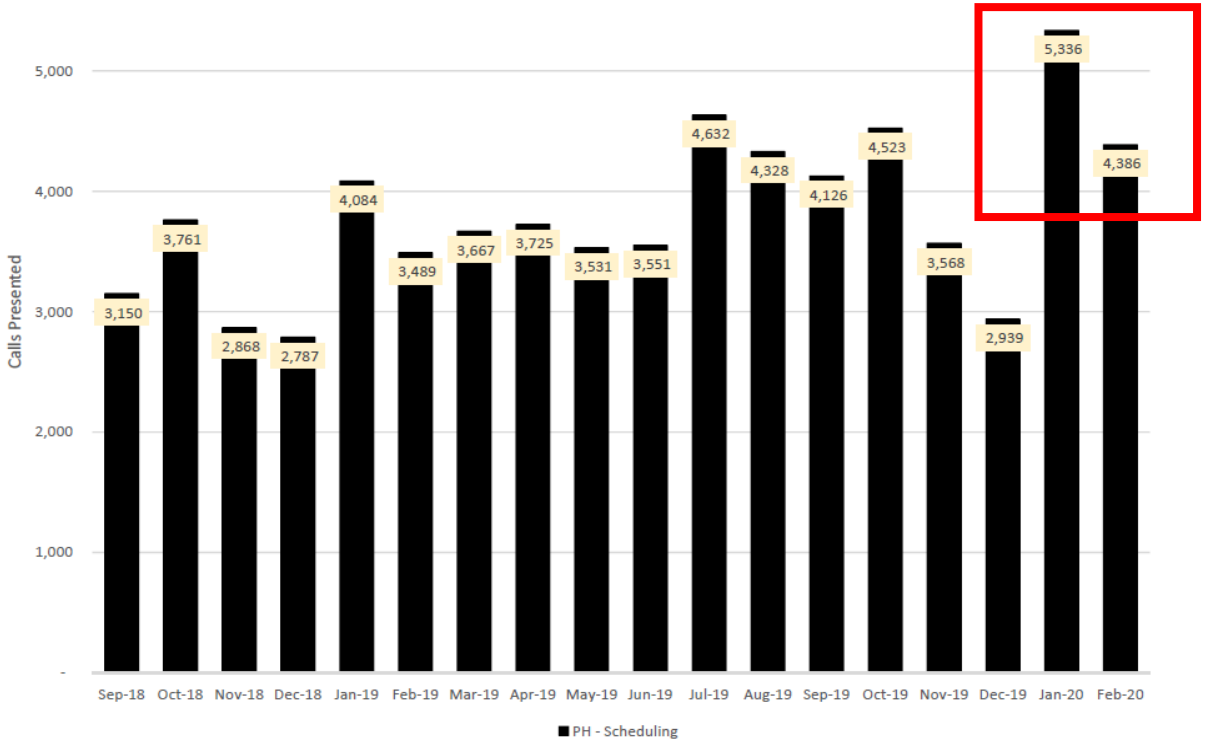
Campaign Results

Website New Users: Jan-Sept 2019 vs Jan-Sept 2020

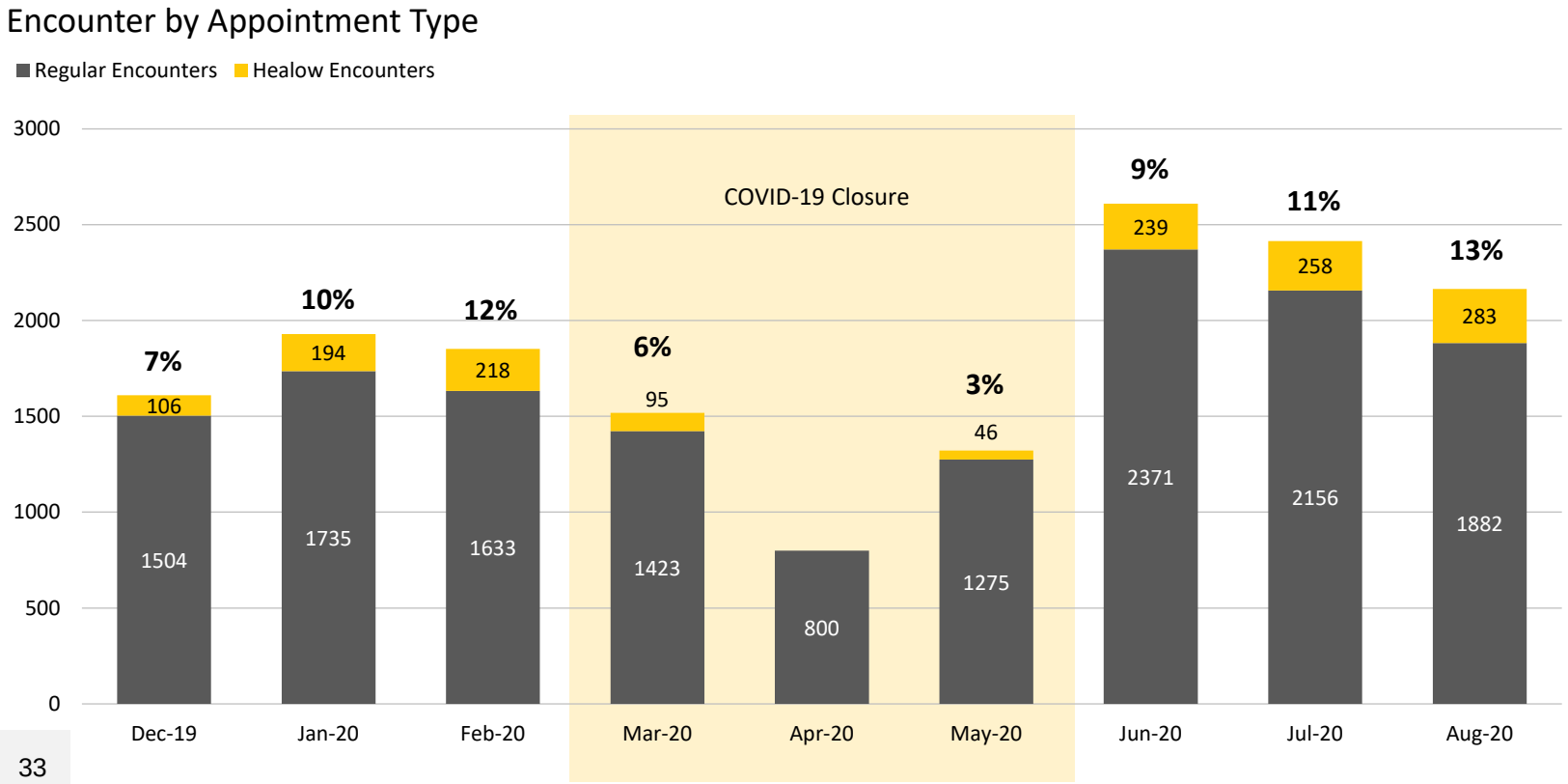


Campaign Results (Pre-COVID)

Phone Metrics

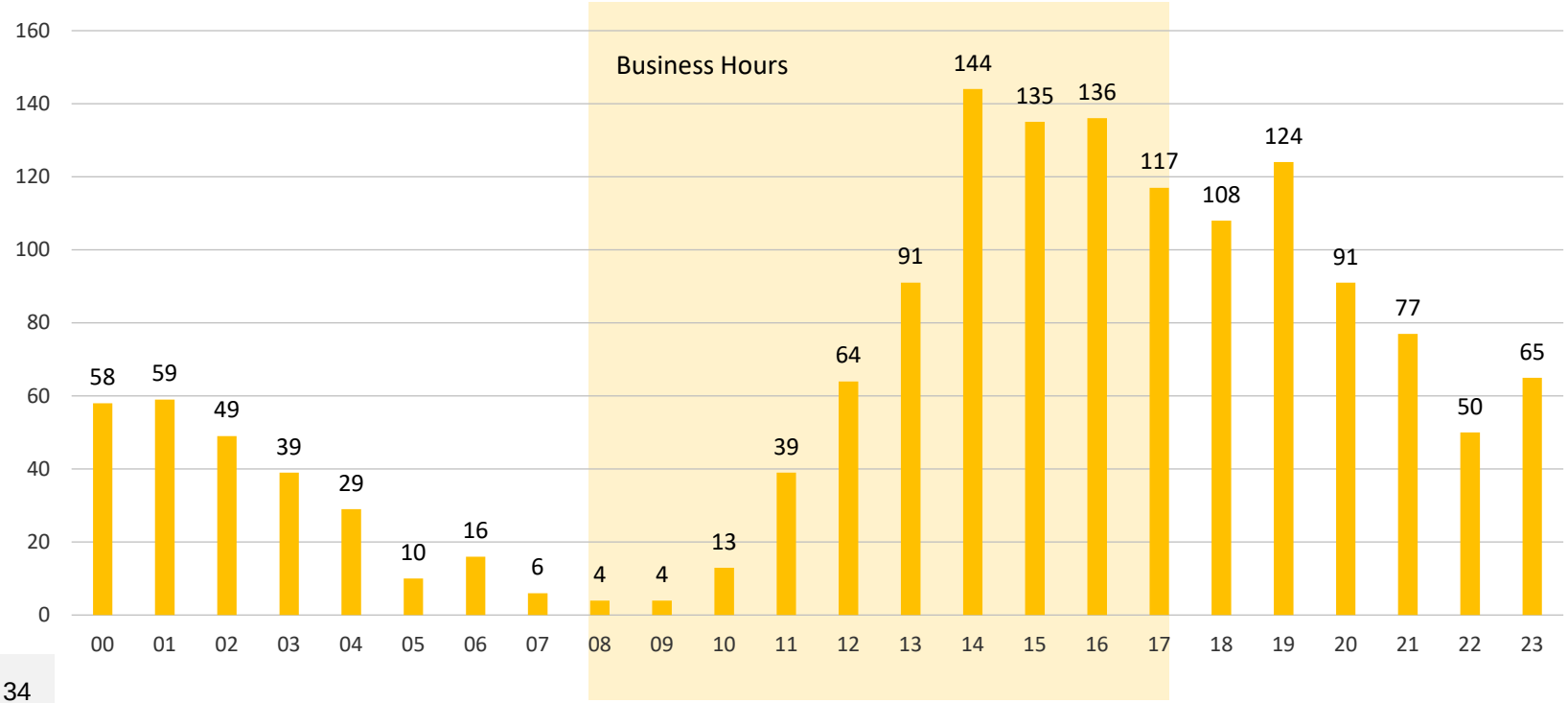


Campaign Results

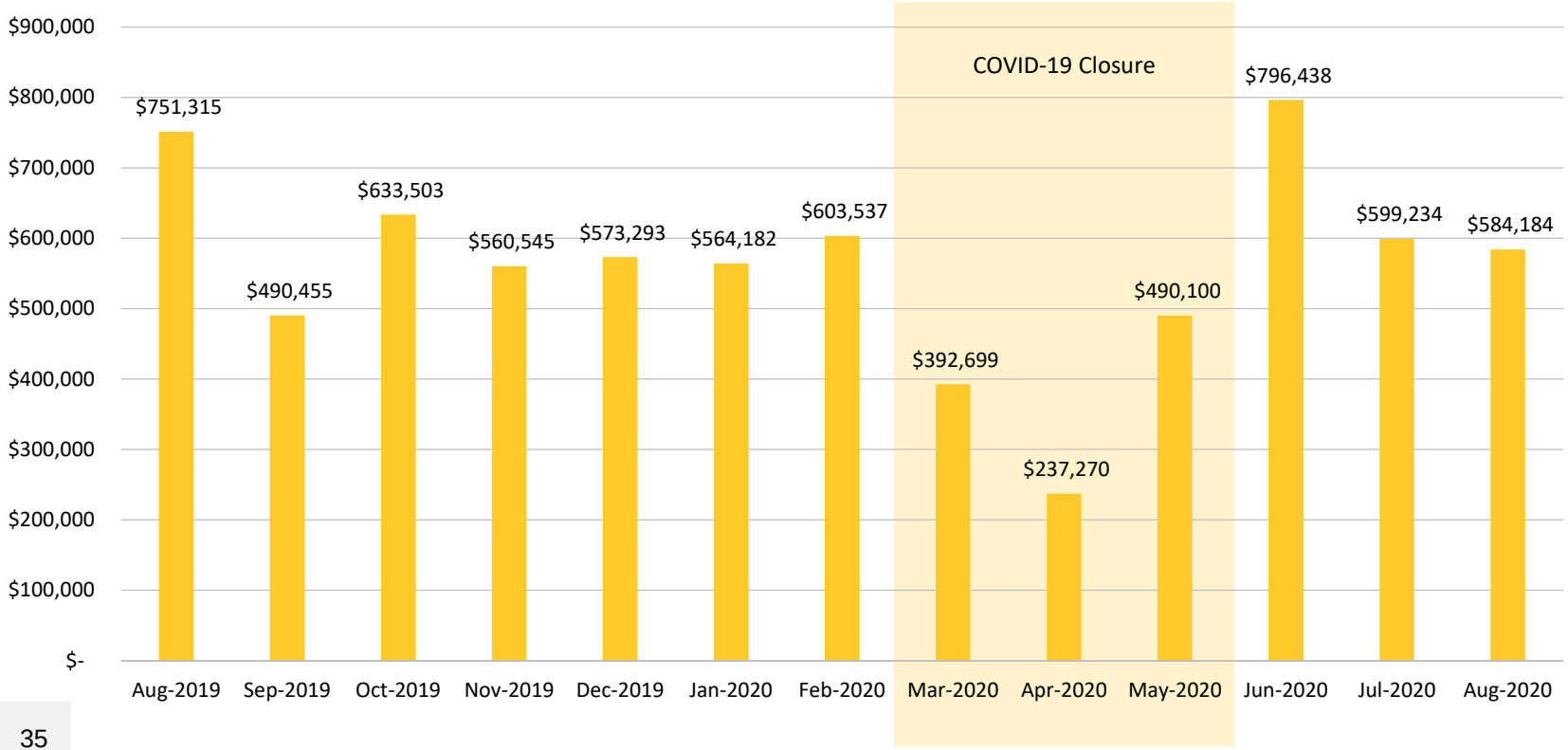


Healow Appointments by Hour of Day

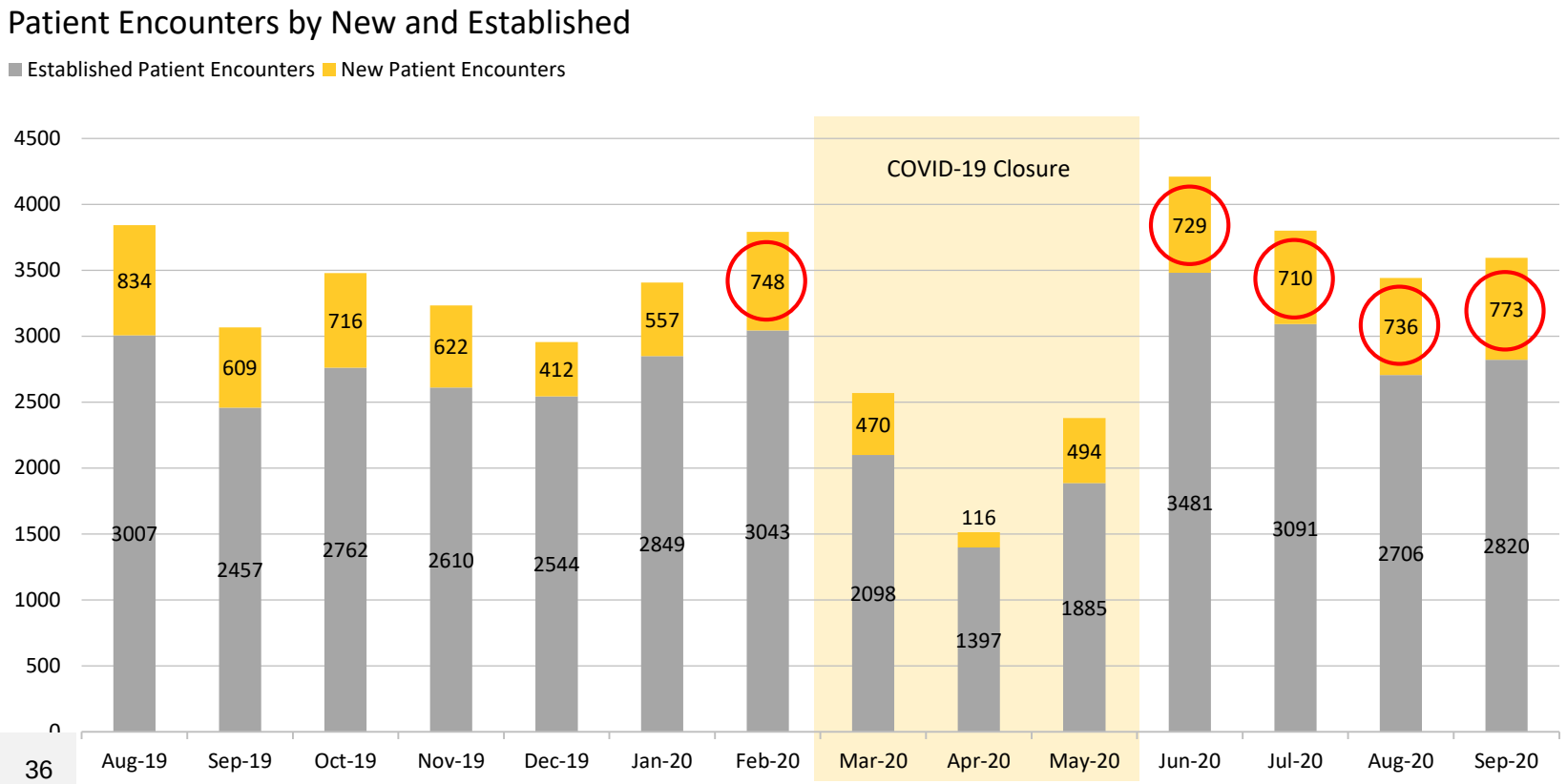
12/2019 to 8/2020



Gross Revenue



Campaign Results



Continuing and Expanding the Strategy

Continue campaign objectives:

- Increase in core website metrics
- Increase in telephone appointments
- Increase in online appointments
- Increase patient awareness of all specialties

Additional Focus Areas: (SEO strategies)

- Lifestyle medicine
- Transgender health services
- Specialty procedures - Mohs surgery, endocrine surgery

Adding tactics of:

- Internal clinic materials and patient experience
- Leverage email and app communication

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