

**Texas A&M International University
Annual Institutional Effectiveness Review (AIER)
for Administrative or Educational Support Units**

Unit Name:

Institutional Advancement

Unit Type:

Administrative Unit

Educational Support Unit

Assessment Period Covered:

January 2009 to February 2010 -- FY 09

Unit Coordinator (Preparer of Report):

Candy Hein

List Other Report Contributors (if applicable):

Becky L. Garcia – Director of Foundation and Donor Relations

Ronnie Gonzalez – Director of Alumni Relations

The annual review is directed at the following goals of the Texas A&M International University 2006-2010 Strategic Plan. Please list goals below:

4.1 Identify, obtain and retain financial support from a variety of sources to supplement State of Texas funding.

4.2 Increase alumni financial support, involvement and partnership with the University community.

Institutional Mission

Texas A&M International University, a Member of The Texas A&M University System, prepares students for leadership roles in their chosen profession in an increasingly complex, culturally diverse state, national, and global society ... Through instruction, faculty and student research, and public service, Texas A&M International University embodies a strategic point of delivery for well-defined programs and services that improve the quality of life for citizens of the border region, the State of Texas, and national and international communities.

Administrative or Educational Support Unit Mission

The Office of Institutional Advancement will promote, strengthen, and enhance the involvement of all stakeholders for the advancement of the institution.

Provide summary of the last cycle's use of results and changes implemented

This statement should specify if the outcomes addressed were a continuation of previous ones, new outcomes, or modified versions of previous outcomes. In addition, the statement should include a concise analysis of the assessment data collected during the previous year, a brief explanation of actions taken to

address specific outcomes, an evaluation of how these actions contributed to the improvement of the unit, and any recommendations formulated. Assessment data must be viewed and discussed by the unit during this process.

Outcome 1: Institutional Advancement will increase total giving to the University to \$10 Million for FY 2009, will require the following tactics:

- a) Increase grants from private and corporate foundation in collaboration with other fund-raising opportunities
- b) Seek out new prospects to expand the area source of financial support outside of the Laredo area
- c) Increase on-campus awareness of ALL4TAMU and importance of scholarship funding
- d) Implement corporate partnership and extend relations with those who give
- e) Develop planned giving and legacy society
- f) Create online giving

Outcome 2: Alumni Relations will increase alumni donations to \$30,000 in FY 09 and participation using the following tactics:

- a) Expand the Alumni phonathon to year round calling with paid student employees.
- b) Create on-line giving opportunities which will expand the number of possible donors that will expand to international alumni and those whose contact number are out-of-date. And create an aggressive E-Campaign to promote usage.
- c) Continue to collaborate with Employer Relations in expanding professional networking opportunities world-wide.
- d) Utilize new opportunity to highlight alumni and solicit donations using *Prism*, TAMU's magazine.
- e) Implement and/or purchase software for social networking that will intensify affinity circles and engage alumni currently using leading social networking sites such as Facebook.

Outcome 3 has been incorporated in Outcome 1's tactics.

List of unit-level outcomes

It is recommended that units rotate through their entire set of outcomes over a multi-year period. Units may focus on one or two outcomes each year, as deemed appropriate.

1. Institutional Advancement will work to increase total giving to the University to \$10 Million for FY2009.
2. Alumni relations will increase annual giving to \$30,000 in FY09 and continue to increase alumni participation on campus

Section I: Planning and Implementation

Outcome 1

Identify the outcome(s) that will be focused upon this year.

Institutional Advancement will work to increase total giving to the University to \$10 Million for FY 2009.

Methods of assessment to be used:

Identify and describe the type of assessment(s) that will be used and how the data will be obtained.

During this assessment period, has your unit used any of the following measures for assessment of outcomes? Indicate "Y" if currently being used; "N" if not currently being used but interested in using; and "NA" if not applicable.

Type of Measure	Y	N	NA	Specify which type of measure was used and what outcome the measure was applied to:
<u>Volume of Activity:</u> (Number of clients served, circulation data, etc.)	Y			Database reports for activities with all donor groups, along with reports to the University, BOR, GDGE, and VSE.
<u>Efficiency:</u> (Turnaround time for filling requests, timely service or prompt response, etc.)	Y			The % of gifts given/foundation grants awarded out of all the actual asks made provide a measure of efficiency.
<u>Service Quality:</u> (Error rates, accuracy of information provided, etc)			NA	
<u>Client Satisfaction Survey</u> (Student, employer, alumni, customer, etc.)		N		
<u>Feedback:</u> (Suggestion box, focus groups, evaluation forms, etc.)	Y			Qualitative feedback from foundations by asking key questions after declines documented in blackbaud.
<u>Review of existing data:</u> (Routine records or reports, institutional data, audits, etc.)	Y			Blackbaud comparison reports, queries and monthly reports.
Staff discussions or evaluations of services to clients	Y			Blackbaud reports on actions and touches. Post event discussions with staff.

Standards/guidelines provided by professional associations	Y			Council for Advancement & Support of Education (CASE) standards, conferences and listserves.
Standards set by federal, state, county, city or system regulations	Y			IRS regulations.
External evaluations or auditors	Y			Voluntary Support of Education (VSE) Report sent to Council for Aid to Education.
Benchmarks or comparisons with peer institutions	Y			Process being put in place by the TAMU System in order to compare data with others. Donor information being reported to BOR, GDGE, and VSE. Grants not necessarily being reported on VSE.
Other				

Outcome 2

Alumni relations will increase annual giving to \$30,000 in FY09 and continue to increase alumni participation on campus.

Methods of assessment to be used:

Identify and describe the type of assessment(s) that will be used and how the data will be obtained. During this assessment period, has your unit used any of the following measures for assessment of outcomes? Indicate "Y" if currently being used; "N" if not currently being used but interested in using; and "NA" if not applicable.

Type of Measure	Y	N	NA	Specify which type of measure was used and what outcome the measure was applied to:
Volume of Activity: (Number of clients served, circulation data, etc.)	Y			Blackbaud reports and queries.
Efficiency: (Turnaround time for filling requests, timely service or prompt response, etc.)	Y			The % of gifts given out of all phone calls made during phonathon or other asks made provide a measure of efficiency.
Service Quality: (Error rates, accuracy of information provided, etc)			N/A	
Client Satisfaction Survey (Student, employer, alumni, customer, etc.)	Y			Surveys conducted throughout the year for alumni opinions.
Feedback: (Suggestion box, focus groups, evaluation forms, etc.)	Y			Suggestions and feedback are generated via the Alumni E-Newsletter, phonathon and surveys.
Review of existing data: (Routine records or reports, institutional data, audits, etc.)	Y			Blackbaud reports and queries.

Staff discussions or evaluations of services to clients	Y			Post Event Discussions with Staff.
Standards/guidelines provided by professional associations	Y			Council for Advancement & Support of Education (CASE) standards, conferences and listserves.
Standards set by federal, state, county, city or system regulations	Y			IRS regulations.
External evaluations or auditors	Y			Voluntary Support of Education (VSE) Report sent to Council for Aid to Education.
Benchmarks or comparisons with peer institutions	Y			Process being put in place by the TAMU System in order to compare data with others. Alumni donation and participation information being reported to BOR, GDGE, and VSE.
Other				

Criteria/Benchmark(s):

Specify, if deemed appropriate to assess outcome(s). Criteria/ benchmark(s) may be optional, especially if qualitative measures are used for data collection.

Outcome 1 – Advancement database reports will be used to assess the outcome of Institutional Advancements work in increase the total amount of gifts to \$10 million, including the goals for total scholarships funds needed as defined by Financial Aid, and increasing foundation and corporate grant gifts of previous year.

Outcome 2 – Alumni relations will use database report to assess if the increase of \$30,000 is met, along with comparative reports to compare increases in participation.

Section II: Analysis of Results

What were the results attained?

Describe the primary results or findings from your analysis of the information collected. Were the results used to improve the unit services or operations? Please specify:

Fiscal Year 2009 was used for results provided.

Outcome 1 – Although funding saw positive increases in the foundation and corporate grant campaigns and ALL4TAMIU campaign, 241% and 13% increases respectively, overall the funding goal of \$10 million was not met primary due to the financial climate of the nation.

Outcome 2 – Alumni relations met the goal of increasing donations and participation; therefore, offering additional scholarship opportunities.

What were the conclusions reached?

Include a brief description of the procedure used for reaching the conclusion(s) based on the evidence collected and describe the process used to disseminate the information to other individuals. For example, if the discussion took place during the annual retreat, include a summary from those deliberations using the Meeting Minutes template found on the Project Integrate web page at

<http://www.tamtu.edu/integrate/docs/Minutes-Template.doc>. Once completed, submit the minutes to assessment@tamtu.edu.

Outcome 1 – Comparison reports of the GDGE report, foundation gifts and corporate grants report, ALL4TAMTU reports were run on by Blackbaud to collect evidence, shared at staff meetings, divisional meetings and Executive Council.

Outcome 2 – Comparison reports of the GDGE report run by Blackbaud to collect evidence, shared at staff meetings both divisional and departmental, analyzed to make plans using the results.

Describe the action plan formulated. (The plan may be multi-year in nature.)

Based on the conclusion(s), describe the action plan to be implemented to improve or maintain unit services and operations, including resources needed and a timeline for implementation.

Outcome 1: Institutional Advancement will increase total giving to the University to \$10 Million for FY 2010, will require the following tactics:

- a) Increase grants from private and corporate foundation in collaboration with other fund-raising opportunities
- b) Continue to seek out new prospects to expand the area source of financial support outside of the Laredo area
- c) Increase on-campus awareness of participation in ALL4TAMTU and importance of scholarship funding
- d) Implement corporate partnership and extend relations with those who give
- e) Develop planned giving and legacy society
- f) Create online giving

Outcome 2: Alumni Relations will increase alumni donations to by 15% in FY 2010 and participation using the following tactics:

- a) Expand the Alumni phonathon to year round calling with paid student employees.
- b) Promote on-line giving opportunities which will expand the number of possible donors that will expand to international alumni and those whose contact number are out-of-date. And create an aggressive E-Campaign to promote usage.
- c) Continue to collaborate with Employer Relations in expanding professional networking opportunities world-wide.
- d) Create alumni dinner and recognition programs to encourage participation on campus, while planting the seeds for potential support of the University.
- e) Implement and/or purchase software for social networking that will intensify affinity

circles and engage alumni currently using leading social networking sites such as Facebook.

Section III: Resources

Resource(s) to implement action plan:

Describe the resources that will be needed to implement the action plan. Also indicate if the resources are currently available, or if additional funds will be needed to obtain these resources.

Funding

New Resources Required

Alumni Relations-

- A) The year round phonathon will require funding for a manager and student callers.
- B) Increase travel budget
- C) Purchase software that interfaces with dominant social networking sites.

Foundation and Donor Relations -

- A) Website, PCI compliance and other resources to provide online giving to all donors
- B) Increase travel budget to meet with Foundations and attend training sessions

Reallocation of current funds

Alumni Relations and Foundation and Donor Relations-

- A) Reallocate unused salary to create an assistant position to support the administrative needs of the departments
- B) Reallocate unused salary to create a position that can assist with graphic design, writing, and researching needs of the departments

Physical

New or reallocated space

Other

Primarily faculty/staff time

Alumni Relations-

- A) Utilize currently owned University resources to implement on-line giving and use staff time to develop marketing campaign.
- B) Research alumni contact information and verify employment.

Foundation and Donor Relations-

- A) Utilize currently owned University resources to implement on-line giving and use staff time to develop marketing campaign.
- B) Research foundation and corporations to seek additional grant funds.
- C) Create an ALL4TAMIU committee in order to increase participation.

University rule/procedure change only

Alumni Relations-

- A) Receive authorization to utilize currently owned technology and implement on-line social networking.
- Foundation and Donor Relations-
- A) Authorization to utilize latest technology, (ie. Flash, YouTube, etc) for spreading message of online giving to alumni, faculty and staff, donors and other friends of the University.

Provide a narrative description and justification for requested resources (include linkage to Strategic Plan – or Compact, if relevant)

Institutional Advancement links goals to 4.1 of the Strategic plan by using technology of online giving to obtain and retain financial support from faculty and staff and donors and research on foundation and corporations to identify new grant opportunities.

Alumni Relations links its goals to 4.2 of the Strategic Plan by expanding Phonathon, On-Line giving capabilities and alumni networking opportunities.

Identify proposed outcomes for the next assessment cycle:

Continuation of present outcome(s) – (Indicate reason for continuation):

Institutional Advancement will continue to increase total giving to the University to the amount of \$10 million.

Alumni Relations will continue to increase funding for scholarships and participation of alumni on campus.

New Outcome(s) – (List outcomes below):

Modification of present outcome(s) – (Indicate reason for modification):

Date Completed:

9/25/09

Submit completed form to integrate@tamiu.edu.

Updated 9/2009