

# **Texas A&M International University Annual Institutional Effectiveness Review (AIER)**

**Date Submitted** January 2007

**Assessment Period Covered (2006)**

**Academic Program/AES Unit** Office of Institutional Advancement

**Person(s) Preparing Review** Candy Hein

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

The results were met but a larger group of donors need to be participating; therefore, a call center has been established.

Section I: Planning and Implementation

**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.

**Academic Program or Administrative/Educational Support Unit Mission**

The Office for Institutional Advancement will promote, strengthen, and enhance philanthropy and financial resources for the advancement of TAMIU.

**Identify outcomes and the relationship to Strategic Plan**

**Outcome 1**

**Is this outcome related to writing (QEP)?**

Development - Increase estate planning through bequests and charitable trusts established by TAMU System.

**Identify Strategic Plan Goal related to Outcome 1**

Goal 4 Financial Resources

**Identify Strategic Plan Objective related to Outcome 1**

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

**Identify methods of assessment to be used**

Blackbaud reports on types of gifts.

**Indicate when assessment will take place**

Annual

**Criteria/Benchmark**

Number of charitable lead trusts and charitable remainder trusts will increase by 10%.

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**Outcome 2**

**Is this outcome related to writing (QEP)?**

Donor Relations - Involve College Deans and Advisory boards in annual fund and major gift campaigns.

**Identify Strategic Plan Goal related to Outcome 2**

Goal 4 Financial Resources

**Identify Strategic Plan Objective related to Outcome 2**

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

**Identify methods of assessment to be used**

Blackbaud reports on solicitators.

**Indicate when assessment will take place**

Annual

**Criteria/Benchmark**

10% increase in number of solicitors from the Colleges and Departments.

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**Outcome 3**

**Is this outcome related to writing (QEP)?**

Alumni Relations - Increase annual giving by alumni thru direct mail, call center, and face to face visits.

**Identify Strategic Plan Goal related to Outcome 3**

Goal 4 Financial Resources

**Identify Strategic Plan Objective related to Outcome 3**

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

**Identify methods of assessment to be used**

Blackbaud reports on alumni giving.

**Indicate when assessment will take place**

Annual

**Criteria/Benchmark**

An increase of 25% from previous year.

## Section II: Analysis of Results

### **When (term/date) was assessment conducted?**

#### **Outcome 1**

Bimonthly Reports of Gifts Donations Grants, and Endowments beginning March 2006; information for Board report was gathered from BlackBaud reports.

#### **Outcome 2**

The projected Advisory Board meetings were never held.

#### **Outcome 3**

January 2007

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### **What were the results attained (raw data)?**

#### **Outcome 1**

No known charitable trusts or bequests.

#### **Outcome 2**

None

#### **Outcome 3**

Alumni Relations-66% Increase in annual giving by alumni thru direct mail, call center, and face to face visits.

A total of 7,604 alumni were solicited in early January thru direct mail. This was followed by a phonathon in late January thru early February. Pledge reminders from the phonathon were done in late February and early March thru the Call Center. The campaign had a total of 739 alumni donors with 10% participation. The number of solicited alumni increased as well by 13% from the previous year.

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### **Who (specify names) conducted analysis of data?**

#### **Outcome 1**

Executive Director of Development and Senior Advancement Information Specialist.

#### **Outcome 2**

Vice President for Institutional Advancement

#### **Outcome 3**

Alumni Relations Director and Senior Advancement Information Services Specialist

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**When were the results and analysis shared and with whom (department chair, supervisor, staff, external stakeholders)? Submit minutes with data analysis to [assessment@tamiu.edu](mailto:assessment@tamiu.edu) (Please use Minutes Template located on the [Project INTEGRATE](#) web page.)**

Annual Retreat in January 2007.

**NOTE: Submit all assessment documentation (i.e., surveys, rubrics, course exams with embedded questions, etc.) to the Office of Institutional Effectiveness and Planning.**

**Use of Results: Indicate whether criteria were met/not met and what changes, if any, have been identified based on the data collected?**

**Outcome 1**

Met    Not Met

**Provide narrative:** Increase educational opportunities for estate and financial advisors in the community and more face to face visits with prospects.

**Outcome 2**

Met    Not Met

**Provide narrative:** The faculty and Deans were recruited first in order to provide training for them and successful experiences in personal solicitations. This experience would teach them to involve their advisory committee members.

**Outcome 3**

Met    Not Met

**Provide narrative:** As the number of alumni solicited continues to increase, a consideration for segmentation needs to be addressed as well as to the outsourcing of marketing strategies or tools to create customized pieces of solicitation as the departments resources are limited.

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**How have these data-based changes improved your program/unit?**

Made us more aware of the need to educate the community on Philanthropy.

Section III: Programmatic Review

**Are resources affected by the changes identified in Section II?**  Yes  No

**If so, specify the effect(s) using the chart below:**

Funding	Physical	Other
<input type="checkbox"/> New resources required	<input type="checkbox"/> New or reallocated space	<input checked="" type="checkbox"/> Primarily faculty/staff time
<input checked="" type="checkbox"/> Reallocation of current funds		<input type="checkbox"/> University rule/procedure change only
		<input type="checkbox"/> Other:

**Provide a narrative description and justification for requested resources (include linkage to Strategic Plan)**

None were requested

<b>Identify proposed outcomes for the next assessment cycle:</b>
Continuation of present outcome(s) – (Indicate reason for continuation): Outcomes #1 and #2 were not met and reorganization is being discussed.
New Outcome(s) – (List outcomes below): Still under discussion
Modification of present outcome(s) – (Indicate reason for modification): Will outsource training of faculty and staff on major fund-raising campaign since we were unable to meet outcomes with current staff.

**\*\*\*\* This section to be completed by dean/director/vice-president \*\*\*\***

**Are resources requested a priority for the academic program/AES unit?**

Yes  No

**Comments:**

Enter text here

**If funding, physical or other resources were requested, what is the impact of the budget decisions on the academic program/AES unit?**

Enter text here