

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

Date Submitted February 29, 2008

Assessment Period Covered (2007)

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 outcomes identified are key to the department's mission and goals, so they have been retained for the 2007 Assessment Period Covered. An additional outcome for the assessment period is included to reflect the department's new foundation relations initiative.

Section I: Planning and Implementation
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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 the 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

Annually

Criteria/Benchmark

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

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 report on solicitors

Indicate when assessment will take place

Annual

Criteria/Benchmark

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

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

4.1 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 alumni Annual Giving

Indicate when assessment will take place

Annual

Criteria/Benchmark

25% increase from previous year.

Outcome 4

Is this outcome related to writing (QEP)?

Foundation Relations - Increase gifts from foundations.

Identify Strategic Plan Goal related to Outcome 4

Goal 4: Financial Resources

Identify Strategic Plan Objective related to Outcome 4

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 report of gifts comparison

Indicate when assessment will take place

Annual

Criteria/Benchmark

25% increase from the previous year.

Section II: Analysis of Results

When (term/date) was assessment conducted?

Outcome 1

Every month when the FBMR is produced by the business office and every other month when the Gifts, Donations, Grants, and Endowment report is prepared for the Board of Regents. Final assessment is done at the end of the fiscal year (August) when the end of the year report is prepared for the Board of Regents.

Outcome 2

Every month when the FBMR is produced by the business office and every other month when the Gifts, Donations, Grants, and Endowment report is prepared for the Board of Regents. Final assessment is done at the end of the fiscal year (August) when the end of the year report is prepared for the Board of Regents.

Outcome 3

Every month when the FBMR is produced by the business office and every other month when the Gifts, Donations, Grants, and Endowment report is prepared for the Board of Regents. Final assessment is done at the end of the fiscal year (August) when the end of the year report is prepared for the Board of Regents.

Outcome 4

Every month when the FBMR is produced by the business office and every other month when the Gifts, Donations, Grants, and Endowment report is prepared for the Board of Regents. Final assessment is done at the end of the fiscal year (August) when the end of the year report is prepared for the Board of Regents.

What were the results attained (raw data)?

Outcome 1

We have the possibility of (two) 2 planned gifts but nothing was finalized through the TAMIU agreement process.

Outcome 2

Solicitors increased from 37 to 41, for an increase of 11%.

Outcome 3

the amount decreased by 33%.

Outcome 4

Grants increased by 150% and received 136% more funds.

Who (specify names) conducted analysis of data?

Outcome 1

Executive Director of Development (B. J. Mathieu) and staff.

Outcome 2

Director of Foundations and Donor Relations (Rebecca Garcia) and staff.

Outcome 3

Director of Alumni Relations (Veronica Gonzalez) and staff.

Outcome 4

Director of Foundations and Donor Relations and staff.

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 (Please use Minutes Template located on the Project INTEGRATE web page.)

The staff in the Office of Institutional Advancement compiled the preliminary figures needed by the Directors in order to summarize and comparatively analyze the data. Once data was validated, the directors then presented information to the Vice President for Institutional Advancement for further review. At the end of fiscal year (August), a final report of the *Gifts, Donations, Grants, and Endowments* was submitted to the Board of Regents. This same report is compiled into the publication, Annual Report, and made available to the University's internal and external stakeholders. Furthermore, all donors receive a copy of the *Annual Report*.

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: The Executive Director of Development held several informational sessions for the community. She became a member of the Planned Giving Council of San Antonio and travelled once a month to their meetings. There are two prospects but nothing has been finalized.

Outcome 2

Met Not Met

Provide narrative: The goal for 2007 was to involve College Deans and Advisory Boards in annual fund and major gift campaigns. We encouraged the participation of the Deans by having them attend a Council for the Advancement of Support of Education (CASE) conference in April

of 2007. The conference covered over everything from engaging the alumni as students to the types of campaigns to capturing the donor's attention.

Additionally, we have encouraged not only the Deans, but also the faculty and staff to be more active in the solicitation process of gifts by accompanying them on visits and meetings with donors.

Comparing the FY 2007 to FY 2006, our total overall solicitors for the university has grown to 41 solicitors, 11% from the prior year. If we do not count the Institutional Advancement staff as solicitors, then we have grown from 29 to 32, for a growth of 14% with deans, faculty and staff being the active solicitors.

Outcome 3

Met Not Met

Provide narrative: One of the larger modes of donations with the alumni group is received from the annual phone campaign. Although a request to hire callers in FY 2006 was denied, the office was given two additional work studies for a total of 5 student callers. The class schedules of the student work studies made it impossible to have a regularly scheduled phonathon. Thus, making it difficult to call the prospects in the evening when they were at home.

Additionally, the use of direct mail to solicit donations from alumni has been problematic due to invalid addresses, and the costs associated with the postage and the production of informative materials.

Outcome 4

Met Not Met

Provide narrative: the goal for 2007 was to increase gifts from foundations. In order to do so, the Office needed to create a position whose primary responsibility would be grant writing to private institutions. Due to lack of money, an existing position was renamed to Director of Foundations and Donor Relations. Grant proposals were sent to foundations that have funded the university in the past and to new foundations that were identified by the director and the staff. At year end, 15 proposals had been granted, for an increase of 150%, and new funds to the university increased by 136%, for a total of \$232,350.

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

Information is more accessible to all staff members and reports can be created as needed by the Directors to obtain the information needed for analyzing.

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: Enter text here

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

N/A additional resources were not requested.

Identify proposed outcomes for the next assessment cycle:
Continuation of present outcome(s) – (Indicate reason for continuation): Outcome 2: The increased number in solicitors added to the growth of fundraising and therefore, we will continue to include additional solicitors in future campaigns. Outcome 4 We will continue to seek funding from private foundations and increase the number contacted in order to reach our goals.
New Outcome(s) – (List outcomes below): An annual gift of \$1 million over a 10 year period has been conferred with the stipulation that the university will find matches for the \$1 million. Therefore, in order to secure the total among, we will have to be seeking these monies. Also, an additional monetary goal of \$250,000 is needed for student scholarships due to a high recruitment and retention rate.
Modification of present outcome(s) – (Indicate reason for modification): Outcome 1: We need to pursue a new market and planned gifts are another venue. We have to make more face to face visits. Outcome 3: We need to continue seeking funds from alumni. After analyzing results, solicitation via telephone will be reorganized and the use of direct mail will be used minimally. Additional means of solicitation will be explored.

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

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

Yes No

Comments:

If these departments are to be successful, additional money for travel will be needed in order to contact prospects out of town.

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

Monies were not requested, but the two new outcomes will have a big impact on the budget. Therefore, monies will have to be used from the University fund.