Unit Name:

Institutional Advancement

Unit Type:
   _X__ **Administrative Unit**   ___ **Educational Support Unit**

Assessment Period Covered:

January 1, 2008 to January 31, 2009

Unit Coordinator (Preparer of Report):

Candy Hein

List Other Report Contributors (if applicable):

Barbara J. Mathieu – Executive Director of Development
Veronica Gonzalez – Director of Alumni Relations
Rebecca L. Garcia – Director of Foundation and Donor 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:

Goal 3: Service –Maintain, strengthen and expand service to University stakeholders.

<ins>Institutional Mission</ins>

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.

<ins>Administrative or Educational Support Unit Mission</ins>

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

<ins>Provide summary of the last cycle's use of results and changes implemented</ins>

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.

#1 The division reviewed the data collected in 2007-2008 FY and adopted the following for Institutional Advancement for 2008-09 that it will work closely with the College of Business

Administration in matching $1 million gift each year for the next 10 years.

#2 Alumni Relations has continued to increase annual giving and participation. The dollar amount of donations has increased by 175% from FY 07. In addition, the number of alumni gifts has increased to 1134 reflecting a 90% increase.

#3 Development would be raising money for unrestricted scholarships. In an effort to improve annual giving, an estimated 2,000 businesses would be contacted for a $1,000 donation. The goal this year would be $250,000. Next year the goal would be $500,000. Direct mail campaign would be kicked off in January and a phonathon would be conducted in the Spring.

Foundation and Donor Relations would increase the percentage of grants received in FY 08 compared to FY 07. This would be accomplished by 1) reapplying to all past grant donors, and 2) qualifying, researching and submitting new grants through tools like Foundation Search, Foundation Center and additional corporate foundation outreach.

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 closely with the College of Business Administration in matching $1 million gift each year for the next 10 years

2. Alumni Relations will increase annual giving and participation.

3. Development would raise money for unrestricted scholarships, with the goal this year of $250,000. Foundation and Donor Relations would increase the percentage of grants received in FY 08 compared to FY 07.

Section I: Planning and Implementation

Outcome 1
Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 year.

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			Database reports; Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 years

Efficiency: (Turnaround time for filling requests, timely service or prompt response, etc.)			NA	
Service Quality: (Error rates, accuracy of information provided, etc)			NA	
Client Satisfaction Survey (Student, employer, alumni, customer, etc.)	Y			Database reports; Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 years
Feedback: (Suggestion box, focus groups, evaluation forms, etc.)			NA	
Review of existing data: (Routine records or reports, institutional data, audits, etc.)	Y			Database reports; Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 years
Staff discussions or evaluations of services to clients	Y			Database reports; Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 years
Standards/guidelines provided by professional associations			NA	
Standards set by federal, state, county, city or system regulations			NA	
External evaluations or auditors			NA	
Benchmarks or comparisons with peer institutions	Y			Database reports; Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 years
Other			NA	

Outcome 2

Alumni Relations will continue to increase involvement and gifts.

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.)		N		
Service Quality: (Error rates, accuracy of information provided, etc)			N/A	
Client Satisfaction Survey (Student, employer, alumni, customer, etc.)		N		
Feedback: (Suggestion box, focus groups, evaluation forms, etc.)	Y			Suggestions and feedback are generated via the Alumni E-Newsletter.
Review of existing data: (Routine records or reports, institutional data, audits, etc.)	Y			
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) conferences and listserves.
Standards set by federal, state, county, city or system regulations		N		
External evaluations or auditors			N/A	
Benchmarks or comparisons with peer institutions		N		
Other				

Outcome 3

Development would raise money for unrestricted scholarships, with the goal this year of $250,000.

Foundation and Donor Relations would increase the percentage of grants received in   FY 08 compared to FY 07.

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			Actions of mailings, phone calls, qualifying and proposals sent were created in constituent accts that were contacted through blackbaud database and able to be reported on.
Efficiency: (Turnaround time for filling requests, timely service or prompt response, etc.)	Y			For grant proposals, the % of grants awarded out of those applied to would provide a measure of efficiency.
Service Quality: (Error rates, accuracy of information provided, etc)			NA	
Client Satisfaction Survey (Student, employer, alumni, customer, etc.)			NA	
Feedback: (Suggestion box, focus groups, evaluation forms, etc.)			NA	
Review of existing data: (Routine records or reports, institutional data, audits, etc.)	Y			Blackbaud comparison reports have been run on a campaign basis to obtain data
Staff discussions or evaluations of services to clients			NA	
Standards/guidelines provided by professional associations	Y			CASE Standards.
Standards set by federal, state, county, city or system regulations			NA	
External evaluations or auditors			NA	
Benchmarks or comparisons with peer institutions		N		Process being put in place by 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				

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 Data base reports will be used to assess the outcome of Institutional Advancement will work closely with the College of Business Administration in matching $1 million gift each year for the next 10 years

Outcome 2 – Alumni Relations' results measurements are quantitative.

Outcome 3 – Development used the goal of $250,000 from reports of lack of scholarship funding from the Office of Financial Aid and Office of Recruitment and School Relations.

Foundation and Donor Relations used the FY 07 Foundation and Grants gift total of $292,350.

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:

Outcome 1: During the analysis period of 3/1/08 to 1/14/09, $560,000 in cash and $500,000 in pledges were received for College of Business Administration in matching $1 million gift each year

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

Outcome 3: Development surpassed the goal of $250,000 and raised $312,465 during the 2008 annual giving "1K Push" campaign for unrestricted funds for scholarships.

Foundation and Donor Relations increased grant monies for FY08 by 72%, for a total of $503,599.95. The grant funding provided us the ability to fund new initiatives on campus, on-going programs, and scholarships.

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.tamiu.edu/integrate/docs/Minutes-Template.doc. Once completed, submit the minutes to assessment @tamiu.edu.

Outcome 1:   Discussions at Annual Retreat; Staff meetings; AIER Divisional meeting.

Outcome 2:   Divisional and Departmental meetings were held to analyze and plan using results.

Outcome 3:   Reports run by Blackbaud to collect evidence, shared at staff meetings, divisional meetings and Executive Council.

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: To increase total giving to the University to $10 Million for 2009-2010, an increase of 43%, 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 ALL4TAMIU 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: The action plan will be used to help increase alumni donations to $30,000 in FY 09 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*, TAMIU'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.

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

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 Reations-
    - 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.
    - B) Creative freedom for logos and campaign pieces that are produced to shared with donors.

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

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

Foundation and Donor Relations 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.

Identify proposed outcomes for the next assessment cycle:

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

 Alumni Relations will continue to increase funding for scholarships.

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

To increase total giving to the University to $10 Million for 2009-2010, an increase of 43%,

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

Date Completed:

1/30/09

Submit completed form to underline *integrate@tamiu.edu.*