

**THINK PURPLE  
THINK ACCOMPLISHMENTS  
THINK WESTERN**



**OFFICE OF THE VICE PRESIDENT FOR  
ADVANCEMENT AND PUBLIC SERVICES**

**FY14 Planning and Accomplishment Guidelines**  
**Western Illinois University**

Due from Vice Presidents April 4, 2014  
Public Presentations April 17 & 18, 2014

**Respond to the following questions in ten to fifteen pages. Attach appendices with supporting documentation where appropriate. Please be sure to prepare responses that address Western Illinois University-Macomb and Western Illinois University-Quad Cities as appropriate.**

**Current Year**  
**Fiscal Year 2014**

**I. Accomplishments and Productivity for FY14**

The mission of the Division of Advancement and Public Services at Western Illinois University is to share information about the achievements of the University, its students, faculty, alumni and programs; and to articulate the institution's needs in the form of budgetary, philanthropic and programmatic support. Advancement activities are conducted primarily through the efforts of the WIU Foundation and Development Office, University Marketing, University Relations, the Visual Production Center, and University Television. Advancement also occurs as a natural consequence of academic life at the University through the contact of its faculty and administration with students, parents and friends of WIU, and simply in the manner in which alumni and friends express their loyalty and concerns.

The goals and accomplishments are in support of the following Strategic Plan Action Items:

- Provide statewide and national leadership in reducing levels of student indebtedness and increasing cost predictability and affordability through scholarships.
- Provide safe, accessible, responsive campus environments that meet the needs of University constituencies and reflect the core values of the University.
- Use planning, budgeting, and reporting structures to advance University goals and accountability.
- Prepare students to be contributing members of the WIU community.
- Support the comprehensive campaign.
- Increase the percentage of alumni giving to the University.
- Consult with external advisory boards to help advance the academic mission and service operations of Western Illinois University.
- Increase awareness of Western Illinois University and our traditions of excellence.

A. Give a brief review of the division's goals and objectives for FY14.

**a. Foundation and Development**

- i. Raise the necessary funds to complete the comprehensive campaign by December 31<sup>st</sup>, 2013.
- ii. Begin the process of establishing goals for fundraising for Western once the campaign is complete.
- iii. Plan the successful campaign celebration.
- iv. Fill necessary positions that have been vacant in the development office.

**v. Accounting and Gift Processing**

1. Increase the accuracy of data in reports.
2. Continue to perform the comprehensive review of reports.
3. Continue to write policies and procedures for areas in which they are deficient.
4. Continue to enhance risk assessment initiatives.
5. Continue to enhance training materials.
6. Enhance training of support staff.
7. Participate in relevant training seminars to remain updated on key issues (GASB, FASB, IRS, etc.).

**vi. Prospect Management and Research**

1. Use wealth screening results obtained in March 2013 to identify final tier of fundraising

- prospects to suggest to Development Officers for addition to their portfolios for the last stretch of the campaign.
- 2. External wealth screening combined with internal predictive modeling will identify new prospects from within our current constituent base.
- 3. Compile New Worth for the Top Prospects in Development Officer portfolios.
- vii. **Annual Giving**
  - 1. Consolidate Annual Fund outreach into one comprehensive, University-wide effort.
  - 2. Continue efforts in establishing a culture of philanthropy among undergraduate students by leveraging students participating in direct mail/Phonathon annual fund efforts.
  - 3. Establish “Giving Circles” program among young alumni to leverage existing social networks and increased AF participation.
  - 4. Increase young alumni participation in the Annual Fund from less than 5% to 10%.
  - 5. Increase Phonathon revenue by 10% or greater in FY14.
  - 6. Achieve Annual Fund fulfillment rate of 85% or greater in FY14.
- viii. **Donor Relations**
  - 1. As this will be the current Director of Donor Relations’ last year prior to retirement, she plans to organize the donor relations and communications functions for transition to the next person in the position. Strategies include developing a manual and calendar of tasks, keeping all records and correspondence current, and preparing donors for the transition.
  - 2. Work with college and unit Development Officers to develop individual stewardship plans for major donors.
  - 3. Continue to coordinate with Foundation Chief Accountant to bring all planned gift and scholarship accounts into compliance and under-used accounts into full utilization.
  - 4. Expand *Foundation Year in Review* to include Donor Recognition Societies and donor lists; make available online.
- ix. **Special Events**
  - 1. To plan and implement successful Presidential and WIU Foundation events consistent with the mission and strategic plan of the University.
  - 2. Design and manage activities that cultivate relationships, internally and externally, with donors and/or prospective donors, friends, alumni, and employees while increasing affinity levels to the institution.
- b. **University Marketing**
  - i. Continue to increase our visibility in west-central Illinois in our efforts to make WIU the university of choice in our region of the state.
  - ii. Work with our admissions office to target areas for recruiting prospective students.
  - iii. Work with Kelly, Scott, and Madison, a media buying firm that was contracted with in FY13 to develop a digital marketing plan for the Chicago area that will also reach downstate.
  - iv. Develop new 15- and 30-second commercials to be used on television and in theaters throughout the state.
  - v. Broaden our marketing efforts into the border states of Missouri, Iowa, Wisconsin, and Indiana.
  - vi. Continue our branding efforts through our Think Purple campaign and licensing efforts for our official logos.
- c. **University Relations (UR)**
  - i. Continue its support of comprehensive campaign initiatives.
  - ii. Continue to enhance Western’s reputation and recognition as a top comprehensive university.
  - iii. Obtain national recognition for its programs, students, faculty and initiatives.
  - iv. Continue the use of social media to promote Western and its faculty, programs and services globally; to further enhance Western’s recognition and reputation as a quality institution to attract and retain students, faculty and staff; and to engage members of the Western community with an open platform within which they can provide feedback to the institution and ask questions.
  - v. Further enhance its publications program and continue to produce higher quality/innovative publications, which support the strategic plan goals of attracting a diverse student body and faculty to Western.
  - vi. Continue its outstanding relationships with media outlets to promote services, events and programs.
- d. **Visual Production Center (VPC)**

- i. Continue to provide outstanding customer service and provide new products to promote the institution. In addition, VPC will continue its relationship with University Archives to better determine the best method possible for archiving WIU's photographic history.
    - ii. Research innovative methods to market services to students and parents, as well as to the general University and local communities.
    - iii. Further develop and implement University marketing initiatives as outlined in the strategic plan.
  - e. **University Television (UTV)**
    - i. Support Western's commitment to higher education through television and media services.
    - ii. Collaborate with WIU Marketing and Public Relations initiatives.
    - iii. Advance television and media services to other educational and private groups for community outreach.
    - iv. Provide Broadcasting students practical experience in the broadcasting field.
- B. List the most important divisional accomplishments for FY14 and document how these accomplishments support the goals and objectives of the University, including specific Strategic Plan accomplishments.

**a. Foundation and Development**

- i. Our \$60 million Higher Values in Higher Education Campaign came to a successful completion on December 31<sup>st</sup>, 2013. Over \$62 million was raised during the campaign. The endowment grew from \$16 million to \$40 million during the campaign and was nearing \$42 million at the time this report was submitted. Total Foundation assets are now over \$55 million. Our planned giving inventory is now at approximately \$40 million.

Significant gifts include:

- 1. Major gifts:
 

a. Gil Belles	\$82,260
b. Nick & Susan DiGrino	\$25,050
c. John & Kimberly Distefano	\$20,500
d. George Hermann	\$50,550
e. Kay Kennedy	\$50,000
f. Robert & Blenda Ontiveros	\$25,000
g. Robert & Donna Pierson	\$25,000
h. Ruth Richert	\$38,950
i. William & Jo Ann Sanders	\$43,800
j. Mona Sawyer	\$24,800
k. Arlington & Arlene Seymour	\$26,300
l. James Shipp	\$26,000
m. Norman & Carmelita Teeter	\$20,000
n. Dan Webb	\$100,000
- 2. Planned Gifts Received:
 

a. Dorothy Allen	\$60,000
b. Maxene Brooks	\$51,000
c. Daisy Hines	\$23,000
d. Robert Hodges	\$253,000
e. Donald & Gordana Rezab	\$313,000
- 3. Planned Gifts Made:
 

a. Ken & Lorraine Epperson	\$2,000,000
b. John Knowles	\$25,000
c. Kenneth & Betty Wright	\$150,000
- 4. Corporate and Foundation Funding:
 

a. Apple Computer Inc.	\$58,175
b. AT&T Foundation	\$100,000
c. Caterpillar Foundation	\$71,250
d. Chicago Mercantile Exchange Foundation	\$20,000
e. Community Foundation of the Great River Bend	\$33,500
f. Country Financial	\$20,000
g. Doris & Victor Day Foundation	\$37,500

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| h. | John Deere                                   | \$15,810  |
| i. | John Deere Classic                           | \$58,186  |
| j. | Moline Foundation                            | \$50,200  |
| k. | PBS Digital LLC                              | \$23,000  |
| l. | Riverboat Development Authority              | \$22,000  |
| m. | Sodexo Inc & Affiliates                      | \$100,000 |
| n. | State Farm Companies                         | \$56,000  |
| o. | Stronghurst LLC                              | \$25,000  |
| p. | The Schutt Family Believers Charitable Trust | \$25,000  |
5. Ways of Giving:
- a. Mailed financial planning advice to our older alumni which includes a response card for those seeking additional information or a visit from a development officer.
  - b. Website is continually updated so that gifts can be made online.
  - c. Information is provided for those who wish to make electronic transfers of stock or establish giving directly from bank accounts to the Foundation.
  - d. Expanded ways to give through social media and text-to-give that will reach out to our younger alumni.
  - e. Continued to provide information to our alumni about changes in tax laws that might alter giving trends such as making contributions directly from IRA's to Western.
- ii. **Accounting and Gift Processing**
1. Enhance data entry accuracy and data accuracy
    - a. A comprehensive cleanup of prior years' receipt history dating back to the 1970's remains underway to ensure giving history and reports are accurate due to years of issues with the merge system that was fixed in FY12. There are still over 17,000 unique IDs to fix, and it may not be possible to fix them all.
    - b. A new comprehensive guide for using our processing system continues to be developed – it provides detailed instructions for staff regarding how to use screens in the system. This guide will provide consistency and a learning tool for both new hires and existing staff. The guide only has one remaining item to be added as of FY14 – over ten additional pieces were completed during FY14.
    - c. A complete cleanup of duplicate records is a continued focus with over 1,200 sets of duplicate donors merged to date. Cleaning these issues will ensure giving levels and mailings are accurate – eliminating costs and maintaining positive donor relations.
    - d. A concentrated effort to clean up old and inactive individual records is underway. This has resulted in the location of additional duplicate records as well as over 400 records in the system that were incorrectly coded as living despite having died more than 20 years ago, as well as over 1,500 records incorrectly coded as alive despite dying prior to 2010 and over 1,300 coded as alive despite dying after 2010. This effort will help to reduce future costs by removing donors from potential mail feeds, as well as potential data screenings and research downloads. Reports have been established to eliminate future problems of this nature; however, an existing large volume of bad data needs cleaned up before the reports can be useful.
    - e. A concentrated effort was completed to clean up old and inactive business records. This has resulted in “out of business” coding being added on over 400 records. Reports have been established to eliminate future problems of this nature.
    - f. Preliminary plans are underway to completely recreate donor level coding in the system, as it is currently very inaccurate resulting in the wrong people being invited to events, placed into mailings, etc.
    - g. Systems have been established to catch certain data entry errors before they become problematic. Some examples include specific solicitor code and campaign code checks for outside scholarships, reports to identify invalid codes that have fed through the system, and reports to identify problems in specific receipts that will need to be fixed prior to year end and before donor mailings are completed.
    - h. A massive cleanup of membership codes was completed, as it was found that the membership reports previously in place were not working and the receipt and pledge screens were incorrectly coding membership, resulting in the wrong people showing in

mailings for membership areas. New reports have been developed to ensure the systems are now working, and extensive testing is still being done.

2. Enhance efficiency and productivity in data processing procedures
  - a. The beginning phase of part two of the automation of the Scholarship Disbursement process has begun. A new screen is in the preliminary design phases in which departments will be able to enter student scholarships to be disbursed directly into the system for approval, thereby eliminating processing duplication by taking the entire system online.
  - b. A linkage system of all financial statement forms Excel files (GAAP, audit reports, etc.) has been completed so that data can be entered into one place and automatically fed to other reports, thereby reducing the chance of data entry error and eliminating duplicate entry.
  - c. Conversion of donors to yearly-tax receipts has been completed, and a process has been established to ensure donors meeting certain criteria will only receive annual receipts in the future, thereby eliminating printing and mailing costs. In addition, the tax program has been rewritten and tested thoroughly, thereby reducing the need to hand review every single receipt from the system.
  - d. A new code for “permanently lost” friends has been established. This code will be used for people who gave years ago and cannot be found – example, there may be a friend in the system with the name Bob Smith and no address who gave in 1970. We can’t find him, because there is not enough information, and he is coded lost, but he would be sent off to Lexis Nexis on batch jobs looking for address updates for lost. This code exists to eliminate these people from all future searches, as there is no way to identify the person in the future, so we do not need to spend money doing so.
3. Enhance accountability
  - a. Over 40 new edit check reports were created to catch entry type and system maintenance type issues before they become problematic. The focus is on making the user aware of the issue created in an effort to educate and eliminate future errors, as well as on implementing processes to eliminate the future need of mass maintenance issues such as these.
  - b. Results of initial filings were received regarding nationwide charitable solicitation; an annual filing process has been established to ensure continued compliance in the future. Furthermore, webinar attendance is now being undertaken to stay up-to-date on policy changes.
  - c. As a long-term project, policies and procedures continue to be reviewed and written. These policies and procedures will help ensure there is a standard and legal “best” practice for routine transactions or situations that may arise. These policies will be posted to the Foundation website, as needed, to help improve transparency of Foundation policies and procedures. The Real Estate Gift Acceptance Policy was created during FY14.
  - d. Preliminary plans are in place to create reporting categories for future campaigns so dollars raised can be categorized by giving area.
  - e. A comprehensive review of reports being generated for reporting purposes is still in process to determine their necessity and accuracy. During FY13, the SQL conversion was performed on all reports except for one. With the SQL conversion came an additional need to test the accuracy of the reports. At this time year-end reports still need tested and that process will begin in April or May. The review will take a few years to complete, but the end goals are as follows:
    - i. The number of reports will be minimized in an effort to make the system more manageable by both Foundation Accounting and AIMS. This was completed in FY14 – reports and jobs not being used will be archived to avoid unnecessary SQL conversion.
    - ii. The creation of future reports will be monitored for practicality of creation and use to help ensure the system remains manageable moving forward. There is a shift occurring in which non-routine reports are no longer written in a programming language, such as COBOL or Easytrieve, rather they are done through canned

software programs with query capabilities.

- f. During FY13, a comprehensive account review of all 1,700+ accounts was completed – the multi-year project was done to ensure accounts are utilized as restricted by donors and to enhance account documentation. Additional progress was made on the following items relating to this project that are still in progress:
  - i. Several accounts continue to not be utilized, so the goal is to continue to follow up with departments to get them used.
  - ii. Accounts with missing documentation are being followed up on so that donor intent can be documented and the funds can be utilized.
    - 1. This has resulted in a comprehensive plan to get all scholarship criteria up to date. During FY14, over half of the areas on campus received a binder with newly modified and up-to-date criteria in it.
  - iii. Departments are being contacted to complete account signature sheets for funds in which a fiscal agent signature is not on file.

4. Enhance training materials

- a. During FY 14, the completion of print-screen user manuals for the MVS system was completed with the exception of one screen (PFAL). As a result, focus will be re-shifted from creating the manuals to ensuring documentation remains up to date.
- b. F1 Help features continue to be implemented in several database screens to provide quick access to database entry definitions and to prevent the issue of over-allocating time due to having to pull manuals for simple questions.

5. Enhance policy manuals.

- a. Begin the preliminary phase of policy creation and upgrades needed. This includes examining areas of risk and creating an action plan to create and implement policies where needed. A preliminary list of over 25 new policies needed has been created with a long-term objective of creating the policies, as well as a schedule for implementation and upgrade.

iii. **Prospect Management and Research**

- 1. Utilized DataDesk software to build a predictive model of donor propensity to give for 115,502 alumni (this can help fundraisers prioritize prospects within their portfolios).
- 2. Devised MVS database screen enhancements and utilized reporting software to develop ways to demonstrate fundraising progress for individual fundraisers.
- 3. Completed Voluntary Support of Education (VSE) survey reporting FY13 fundraising totals as required by CASE and CAE.

iv. **Annual Giving**

- 1. Targeted direct mail and Phonathon outreach to high propensity friends and alumni in the implementation of a fiscally responsible annual fund campaign.
- 2. Facilitated establishment of a new student group – the WIU Philanthropy Club – to assist in creating a culture of giving among current students and facilitate current and future participation in the Annual Fund.
- 3. Established a new scholarship to benefit student workers of the WIU Phonathon through preliminary “Giving Circles” model.
- 4. Increased total number of direct mail gifts for Fall 2013 Annual Fund initiatives.

v. **Donor Relations**

- 1. Maintained timely, personalized acknowledgement of Foundation gifts of \$500 and above. Individual letters from VP Bainter were sent to over 1,570 donors so far in FY14.
- 2. Drafted acknowledgement letters for President Thomas for major and special gifts.
- 3. Sent special greetings to more than 235 first-time donors so far in FY14.
- 4. Notified donors with pending matching gifts of the procedures necessary to capture that gift.
- 5. Generated monthly reports of memorial contributions to family member/points of contact.
- 6. Sent calendar-year-end thanks and tax information to nearly 400 WIU employee donors and 420 non-employee donors (an increase of 205 from FY13). Corresponded with donors who make multiple gifts in a year as they are moved from individual to annual receipts; numbers increase each year.
- 7. Coordinated with accounting for the mailing of some 290 annual endowment benefactor reports. Reports are personalized with an individualized cover, inside letter, report, and

glossary. The number of benefactor reports sent this year increased again from the previous year; positive feedback was received from those donors who previously had no reporting of their endowments.

8. Coordinated the Foundation's holiday card, gift, and flower program. While we try to decrease the number of cards and gifts in order to conserve resources, we still distributed over 700 cards and 21 poinsettia plants to major donors and friends of the university during the holiday season. The small gift that in the past has been given to the WIU Foundation Board Members and staff was not purchased this year. Board members and staff were given a Colonel Rock 2014 calendar.
9. Documented personal stewardship visits to individual donors, with topics ranging from finalizing scholarship criteria to profile interviews to endowment agreements. Phone calls, emails, and informal visits with donors occurred on a daily basis.
10. Personally stewarded a portfolio of major donors with multiple interests or without a designated development officer (Gil Belles, Bill & Jacquie Brattain, Linda Jani, Rolf Maurer, Gordy Taylor, Bea & Jim Wehrly, Tate Lindahl, Dick & Susan Passmore, etc.).
11. Collaborated with University Relations to publicize major campaign gifts as they were received.
12. Attended Alumni Association events.
13. Assisted with Foundation, Scholarship, and Presidential Entertainment events. Represented the Foundation Office at numerous campus and community events.
14. Wrote press releases for all Foundation gift stories and events.
15. Developed content and supervised production of four issues of *Developments Newsletter*. Wrote all major gift news features.
16. Wrote Foundation content for *Western News* and arranged for two to four Foundation news features to be included in each issue.
17. Provided Foundation gift stories for Alumni's RockeNews.
18. Monitored and updated Foundation website content.
19. Developed content for Foundation-related publicity and correspondence.
20. Assisted WQPT in the review and revision of their membership solicitation & renewal series.
21. Developed content & supervised production of *FY13 Foundation Year in Review*, available online. Limited copies were printed and distributed to Foundation Board and President's National Advisory Council members.
22. Worked with individual donors on specific gifts. Examples include Paul Nollen (Biological Sciences Distinguished Honors Student Research Grant), Dennis Bowman (Dennis Bowman LEJA Scholarship), Olakunle Afolabi (International Student Scholarship), George Hermann (George Hermann Graduate Scholarship in Sport Management), and Gloria Hurh (Won Moo Hurh Memorial Graduate Thesis Award in Sociology).
23. Assisted with the Think Purple public relations campaign. Within the community, t-shirts were distributed to 62 participating business. Took orders for and delivered shirts, corresponded with participating businesses, and maintained calendar. Coordinated with the Macomb Area Chamber of Commerce.
24. As a follow up to the inaugural *We are Western* Faculty/Staff campaign in FY13, corresponded with all new employee donors.
25. Coordinated details, handled communications and attended two President's National Advisory Council meetings.
26. Assisted in the promotion and fundraising for the Federal Art Project Collection of Western Illinois.
27. Helped plan and execute the Andrea Passmore Memorial Golf Outing.
28. Assisted with various promotions for Colonel Rock III.
29. Served on the following university committees: Foundation Summer Stipend Awards, Foundation Naming Committee, EOC Administrative Internship Committee, and the institutional team reviewing the new criteria for accreditation from the Higher Learning Commission-North Central Association of Colleges and Schools. This team is forming an electronic repository that will be the basis for future reporting to the Commission. Also served on the search committee for the Assistant Athletics Director- Development Officer.
30. Consulted with Department of Recreation, Park & Tourism Administration on development of



a minor in fundraising. Assisted with mid-term internship evaluations, served on the planning committee for the 50<sup>th</sup> anniversary celebration of Horn Field Campus, and fundraised for a new outdoor education facility.

31. Served as a volunteer board member for Tri-States Public Radio and Performing Arts Society.

vi. **Special Events**

1. Executed four President's Tents during football season and one President's Buffet during basketball season. These events recognized a variety of individuals such as new faculty, staff & administrators, WIU Civil Service Employees, WIU Foundation Board members, businesses participating in Think Purple Campaign, local veterans and participants of WIU's Fallen Soldiers 5K race.
2. Planned a variety of recurring events funded by the Foundation Office including Athletics Hall of Fame Banquet and one scholarship banquet.
3. Assisted Athletics with the Purple & Gold Gala/Auction.
4. Continued to develop the Presidential Entertainment Initiative by assisting with arrangements for the President's Press Box and President's Gallery of Seats for each home football game.
5. Contributed to the planning and execution of the logistics and events surrounding the Founders' Day Ceremony.
6. Prepared for Campaign Finale Celebration, May 2014.

b. **University Marketing**

- i. Continued to promote the Think Purple campaign locally and regionally.
- ii. With University Relations and University Television, developed a series of five 30-second Think Purple, Think Success videos featuring three WIU students and two WIU alumni. A 15-second piece was also created for a variety of uses. Commercials played in movie theaters during the holiday break and on commercial television stations during select special events, premieres, finales, etc.
  1. Screenvision Theaters: December 13, 2013- January 10, 2014
    - a. Wehrenberg Bloomington Galaxy; Bloomington, IL
    - b. Carmike Place 10; Bloomington, IL
    - c. Rave Grand Prairie 18; Peoria, IL
    - d. Westland Mall 10; Burlington, IA
    - e. North Riverside 6; North Riverside, IL
    - f. Hannibal 6; Hannibal, MO
  2. NCM Theaters: December 6, 2013- January 2, 2014
    - a. Cantera 17 with RPX; Warrenville, IL
    - b. Cinemark – Joliet; Joliet, IL
    - c. Naperville 16 with IMAX; Naperville, IL
    - d. Northbrook Court 14; Northbrook, IL
    - e. Portage 16 with IMAX; Portage, IN
    - f. Schererville 16 with IMAX; Schererville, IN
    - g. Streets of Woodfield 20 with IMAX; Schaumburg, IL
    - h. Chesterfield 14 with IMAX; Chesterfield, MO
    - i. Edwardsville 12 with IMAX; Edwardsville, IL
    - j. O'Fallon Stadium 14; O'Fallon, MO
    - k. St. Louis Mills 18 with IMAX; Hazelwood, MO
    - l. Tinseltown Kenosha; Kenosha, WI
    - m. Springfield 12; Springfield, IL
    - n. Fitchburg 18 with IMAX; Fitchburg, WI
    - o. Davenport 53, 18 with IMAX; Davenport, IA
    - p. Moline Stadium 14; Moline, IL
    - q. Willow Knolls 14; Peoria, IL
    - r. Rockford 16 with IMAX; Rockford, IL
    - s. Quincy 6; Quincy, IL
  3. WGEM; Quincy, IL (NBC/CW/FOX):
    - a. NFL AFC Playoff and Championship Games
    - b. World Series Games
    - c. American Idol Premiere Shows

- d. Early Morning News
- e. The Voice Premiere Season 6
- f. Super Bowl Post-game
- g. Olympic Opening and Closing Ceremonies
- h. Biggest Loser Finale
- i. Super Bowl Game
- 4. KHQA; Quincy, IL (CBS):
  - a. Dancing with the Stars Finale Shows
  - b. Oakland at Dallas Thanksgiving Football Game
  - c. NFL AFC Playoff and Championship Games
  - d. Survivor Finale and Premiere
  - e. The 2014 Grammy Awards
  - f. The Amazing Race Premiere
  - g. The Bachelor Finale
  - h. The 49th Annual Academy of Country Music Awards
- 5. FOX Midwest Sports (St. Louis):
  - a. St. Louis Cardinals vs. Chicago Cubs Baseball Games
- 6. TBS (Macomb/Galesburg/Springfield/Jacksonville/Taylorville):
  - a. Major League Playoffs
- 7. Charter Media (Quincy/Adams County/St. Louis):
  - a. Major League Playoffs
- 8. WAOE TV (Peoria/Bloomington):
  - a. IHSA State Football Championship Games
  - b. IHSA State Basketball Finals
- 9. WCIX (Springfield/Decatur/Jacksonville/Champaign):
  - a. IHSA State Football Championship Games
  - b. Washington, IL vs. Sacred Heart Griffin Game
- 10. WEEK (Peoria):
  - a. Olympic Opening Ceremonies
  - b. The Voice Premiere and Finale
- 11. WQAD (Quad Cities):
  - a. Dancing with the Stars Premiere
- iii. In addition, University Marketing participated in a year-long contract (July 1, 2013, through June 30, 2014) with WGEM (NBC/FOX/CW) in Quincy, Illinois, in which WIU commercials were aired daily. University Marketing added Macomb's Rialto Theater as its newest cinema venue—showing these same 30- and 15-second commercials in 6 screens daily plus the lobby television.
- iv. General WIU and Think Purple marketing and promotion appeared in print publications in Macomb; the Quad Cities; and Keokuk, Iowa. Ads promoting Western's School of Nursing appeared in the Northwest Quarterly published in northern Illinois, southern Wisconsin, and Chicago. The School of Agriculture's Open House was featured in The Lincoln Courier in March.
- v. Think Purple, Signature Academic Programs, and Princeton Review Best Midwestern College ranking billboards were featured in the Macomb region, the Quad Cities, Quincy, Peoria, Chicago, Springfield, Bloomington, St. Louis, Joliet, Beardstown, and along interstates 80 and 55. Some of these locations highlighted current students and their outstanding achievements.
- vi. Continue to display banners and flags on University property (on campus proper and University streets), on various city of Macomb routes, and in local businesses.
- vii. Began advertising on scrolling and digital signage in gymnasiums and stadiums at 15 schools in Iowa and Illinois.
  - 1. Burlington High School gymnasium
  - 2. Davenport North High School gymnasium
  - 3. Davenport West High School gymnasium
  - 4. Bettendorf High School gymnasium
  - 5. Keokuk High School gymnasium
  - 6. Ft. Madison High School gymnasium
  - 7. Indian Hills Community College gymnasium
  - 8. United Township gymnasium

9. Rock Island High School Stadium
  10. Rock Island High School gymnasium
  11. Davenport (Brady Street) Stadium
  12. Freeport High School gymnasium
  13. Belvidere High School gymnasium
  14. Belvidere North High School gymnasium
  15. Geneseo High School gymnasium
- viii. Promotional materials such as Think Purple clings, window perforations, and banners provided to local businesses and on campus.
  - ix. During the holiday season, targeted advertising took place in Woodfield Mall in Schaumburg from November 26 to December 23, 2013, and at Northbrook Court in Northbrook from December 1-31, 2013. Table tents and posters were displayed in North Riverside Park Mall, North Riverside, from September 16 through October 16, 2013. A 12' x 8' digital sign was leased in Water Tower Place in Chicago on Michigan Avenue from March 31 through April 27, 2014.
  - x. Developed the Holiday Greeting video featuring the University Madrigal Singers.
  - xi. University Marketing continued to offer purple t-shirts and polo shirts to businesses for their employees to wear during selected Think Purple days/weekends throughout the year.
  - xii. Working with University Relations, University Marketing promoted the WIU's advancement/participation in the NCAA 6th Fan contest, including paid Facebook ads, press releases, etc.
  - xiii. Continued to coordinate the University's licensing/trademark policy, a new visual identity/logo policy, and licensing and trademark agreements/approvals and logo approvals.
  - xiv. Working with University Relations, University Marketing produced the 2014 Col. Rock Calendar, with photographs from the Visual Production Center.
  - xv. Renewed University Marketing's advertising contract and added new artwork on a back-lit connector in the Quad Cities airport.
  - xvi. Received Western Illinois University's largest royalty check to date from our licensing agent, Licensing Resource Group (LRG).
- c. University Relations**
- i. Managed Crisis Communication.
    1. Coordinated timely warning messages and updates per Clery Act mandates for two crisis-related situations from July 1, 2013-March 7, 2014: sexual assault and off-campus assault. Shinberger and Assistant Director Teresa Koltzenburg monitored Facebook and answered inquiries posted in regard to the incidents.
    2. Coordinated messages and updates re: state's ongoing cash flow/budget crisis.
    3. Coordinated weather-related announcements.
    4. Handled the media inquiries following a Business Insider article ranking WIU in a top 10 category for most drug and alcohol arrests on a college campus.
  - ii. Promoted WIU Programs, Activities, Events & Accomplishments.
    1. Promoted WIU's advancement/participation in the NCAA 6th Fan contest.
    2. Promoted Western's national rankings, Cost Guarantee and recognition from U.S. News & World Report, Princeton Review, GI Jobs, and more.
    3. Participated in national media networks through third party services (Newswise and Profnet) to promote Western's programs and faculty. Examples include from Newswise (a service for journalists to find stories and experts): social media study - 2,919 hits; tornadoes and disaster recovery - 6,854 hits; terrorism - 3,331 hits.
    4. Working with local, regional media, wire service reporters, and national media, UR staff coordinated interviews in which Western faculty and staff served as expert sources for such stories as social media; state budget/economy; extreme weather (tornadoes); terrorism, and more.
  - iii. Supported WIU Marketing Initiatives/Think Purple Campaign.
    1. Darcie Shinberger, working with VPAPS Bainter and assistant Teresa Little, continued to coordinate the University's marketing efforts, including a licensing/trademark policy, a new visual identity/logo policy, licensing and trademark agreements/approvals and logo approvals, as well as billboard and other advertising placement throughout the state.
    2. UR Assistant Director Teresa Koltzenburg, in cooperation with Shinberger and Bainter,

conceived the next iteration of Western's Think Purple, Think Success, Think Western branding initiative/campaign. The "Success Story" (based on the "Think Purple, Think Success" theme) concept featured students (e.g. Sammy Marshall and Chris Lovingood) and alumni (Patrick Magoon and Joe Decker) in a series of 30-second commercial spots, in which the featured individuals presented highlights of their educational careers and demonstrated how Western helped them achieve their "success stories." Koltzenburg composed the scripts for the series and Mark Dial and Todd Draeger from University Television produced the 30-second commercials. (#SuccessStory playlist on YouTube:

<http://www.youtube.com/playlist?list=PL6IDv5Uyc-sLdw7dDZv2ykdpIRpeWQUh9>)

3. UR student worker Amy Koeller, a senior broadcasting major, also produced a 30-second commercial in the Success Story series. With Koltzenburg only helping with the script, Koeller worked independently with the School of Nursing and WIU student-athlete Kristin Becker (nursing major, women's soccer) to feature Becker in the 30-second spot, which ran during the Super Bowl in January. (see <http://www.youtube.com/watch?v=DyLZgXayBgw>)
  4. Jessica Lambert designed the 2014 Col. Rock Calendar, with photographs from VPC. The calendar has been sold through the bookstore (and provided for giveaways), with profits going to support Rocky's Fund.
- iv. Supported University Admissions & General Promotions Initiatives.
1. UR Assistant Director Teresa Koltzenburg served on the Centennial Honors College 30th anniversary planning committee, as well as helped coordinate and distribute some of the promotional materials distributed to publicize the event, which celebrated the history and the various directors of Western's honors program since it began.
  2. Public Information Specialist Jodi Pospeschil continued to assist Admissions with a media campaign to promote the Centennial Honors, Commitment and Transfer scholarships by writing and sending news releases to each recipient's hometown paper to further promote Western's academic quality and opportunities.
  3. Continued to design projects and promotions for the University's Think Purple marketing campaign (lead designer – Jessica Lambert).
  4. Produced undergraduate viewbooks for the Macomb and Quad Cities campuses (QC Viewbook, designed by Jessica Lambert, received a silver award in the 2014 Collegiate Advertising Awards contest, which recognized the top 16 percent in the nation for advertising excellence).
  5. Designed advertising materials (print ads, billboards, banners, etc.).
  6. Designed Summer Session 2013 and 2014 promotional ads, posters, etc. as well as releases/promotions.
- v. Continued Social Media/Web Initiatives for Marketing, Recruitment & Promotions.
1. Under the direction of Assistant Director Teresa Koltzenburg, continued to maintain and update Western's Facebook, Twitter, and YouTube accounts. In Spring 2013, Koltzenburg also started an Instagram account (<http://instagram.com/westerniluniv>, as of March 2014, 1,207 followers) through which photos of students and University events were disseminated. Instagram is a network that relies on photos and hashtags to communicate information, and one particularly effective use of it during FY14 was to ask students, alumni, faculty, and staff to "Instagram" photos showing school pride for Purple and Gold Day (April 2013). The photos were shared on Facebook in an album that highlighted the user-generated contributions (see <https://www.facebook.com/media/set/?set=a.10151893082588957.1073741837.10274793956&type=3>)
  2. While Facebook as a platform has experienced some decline in use by particular demographic groups (various articles and data suggest teens and college-age students have and are migrating to other networks, e.g., Instagram and Snapchat, for peer-to-peer communication), Facebook continues to be a viable platform to distribute important information and promote the University. The page is used not only for WIU to promote the institution, but also continues to serve as a major/main communication conduit for alumni, students' parents, faculty and staff.
    - a. As of March 8, 2014, WIU's Facebook account has 25,394 likes (compared to 21,054 likes in March 2013 and to 15,564 March 2012). The year-over-year increase (from fiscal years 2013 to 2014) was significantly less than in years past; however, the migration of

teens and college-age students to other networks may be a contributing factor to this phenomenon. (Interesting note: In March 2010, we had only 6,809 likes/fans).

- b. Under the direction of Koltzenburg, and produced by University Relations student workers, several videos were conceived, produced and edited to promote a variety of WIU programs/initiatives (big pink volleyball, homecoming, academic departments, campus safety, Rocky After Dark, to name a few).
  - c. UR's Twitter feed, @WIUNews, has 4,916 followers (in March 2013, 3,127 followers); and WIU's YouTube channel has 511 subscribers (395 subscribers, March 2013), but videos typically garner hundreds (and in some instances, thousands) of views.
  - d. Koltzenburg continued to manage the University's presence on other social networks, including LinkedIn. In 2013, LinkedIn created pages specifically for universities and Western's page (see <http://www.linkedin.com/edu/school?id=18327>) has 45,487 followers. The University is also represented in LinkedIn Groups with Koltzenburg managing and monitoring a "Western Illinois University Group" (see <http://www.linkedin.com/groups?gid=653780>), which includes, as of March 2013, 2,889 members. Members in this group can post jobs, career discussion topics, information and content related to career advice, as well as information related to Western.
  - e. In addition, Koltzenburg helped staff in the CBT and COEHS set up LinkedIn sub-groups (under the Western Illinois University Group).
  - f. UR continued to experiment with other social media, such as Google+ (which is connected to the University's YouTube account), FourSquare and Pinterest. Due to lower use overall of these networks, however, more focus is directed toward widely-used tools such as Twitter, Instagram and Facebook.
  - g. Continued the UR blog Beyond the Belltower. Jodi Pospeschil and Teresa Koltzenburg are the main contributors to this blog.
- vi. Continued University-Community Outreach Efforts/Professional Development Initiatives.
1. Editorial Writer Alisha Barnett served as a presenter for Communications Day for the Department of Communications; spoke at a Communication Society meeting; is a member of the Civil Service Council; and is a Building Connections mentor.
  2. Graphic Design Associate Caren Bordowitz completed an online Accessibility Section 508 class. She also volunteers with MHS Marching Band and Scholastic Bowl.
  3. Publications Manager Tim Engel coaches at VIT Junior and Senior High School and is a member of the VIT Booster Club.
  4. Staff Clerk Carla Farniok is vice president of the Civil Service Employees Council; and recently completed CS483 (Microcomputer Systems Database Application) to further enhance her Access database skills.
  5. Pre-Press Technician Dave Gravino completed training in Amara to translate and caption video.
  6. Assistant Director Teresa Koltzenburg is an Alliance member, IT Governance Marketing/External Alliance; executive board member/division representative (Advancement and Public Services), WIU Council of Administrative Personnel (COAP) group; member, Internet Technology Advisory Committee (ITAC); member, Web Accessibility Committee; and co-chair/co-leader, Social Media Marketing/Communications/Promotions Working Group. In Summer 2013, she attended the Content Summit for PR, Social Media and Marketing Professionals, Ragan Communications, and is currently enrolled in the post-baccalaureate certificate in Business Administration program. Koltzenburg serves as a weekly reader for Tri-States Audio Information Services and is a web/communications volunteer for the Illinois Council on Continuing Higher Education (ICCHE).
  7. Webmaster Jessica Lambert serves on the Employee Wellness Committee, web accessibility committee, the Civil Service Employees Council and the iTac web committee, and serves as a Building Connections mentor.
  8. Public Information Specialist Jodi Pospeschil is a member of the ADA Accessibility Committee and the Environmental Summit Committee, and serves as the University representative for the American Cancer Society/Breast Cancer Walk. She also serves as liaison between the University and community for the annual Balloon Rally, which is held on WIU's campus, and is chair of the Macomb Community Foundation Board and a member of

- the Macomb Alzheimer's Walk Committee, Historic Preservation Society and Center for Youth and Family Solutions Board. Pospeschil also serves as a Building Connections mentor.
9. Assistant VP Darcie Shinberger is a member of the Master Planning Committee, the University Theme Committee, the Campus Master Plan Committee, Emergency Management Committee, Emergency Management Core Team, UCOSOGIE, the Center for the Performing Arts Planning Committee, and Fallen Soldier 5k Committee and co-leads the University Marketing Working Group. Shinberger also serves as a Building Connections mentor, and served as a "Promoting Your Community" panelist for the Chamber's Leadership Academy. Shinberger continues to work with local officials to promote WIU and Macomb, and in some instances, assists local city departments with crisis communication efforts. She also serves as the co-chair of the Macomb Volleyball We Dig Pink event, co-coordinator of MHS After Prom, and as a member of the Macomb Educational Foundation.
  - vii. Coordinated and Maintained the University's Freedom of Information Act (FOIA) Requests.
    1. Since July 1, 2013, University Chief FOIA Officer Darcie Shinberger completed 68 FOIA requests to date (March 7, 2014). FOIA requirements are stringent, and must be upheld as set forth by the Illinois Attorney General. Responses typically must be made within five working days to comply with FOIA statutes. Failure to do so can result in fines and other punitive measures against WIU, so the chief FOIA officer (and deputies – Koltzenburg and Pospeschil – who handle in Shinberger's absence) must be vigilant in regard to responses and must remain up to date on all statutes/mandates.
  - viii. Further Enhanced Faculty/Staff Experts File/Database to Promote WIU Experts to Media.
    1. Staff Clerk Carla Farniok continues to update and maintain an experts database.
  - ix. Improved Publications Initiatives.
    1. Edited and produced external publications, newsletters, billboards, ads, etc. for the division, and institutional marketing efforts for admissions, student recruitment and orientation to support the institution's strategic plan/marketing efforts (Western News, Summer Session fliers/posters, etc).
    2. Prepared all publications produced by UR (handbook, viewbooks, catalogs, etc) as accessible PDF documents for posting on WIU website.
    3. Publications Manager Tim Engel each semester works with graphic communication professor Catherine Drinka on student-related projects that can also be used for potential University promotional pieces.
  - d. Visual Production Center**
    - i. Increased Marketing and Outreach Efforts and Improved Services.
      1. During FY14 (July 1, 2013 to March 1, 2014) the Visual Production Center has produced 1,784 jobs [a decrease of 31 jobs compared to 1,815 jobs from July 1, 2012-March 1, 2013].
      2. Continued to aggressively market and promote WIU by offering a variety of products and services, such as WIU Wall Clings, alumigraphix prints, stickers and window clings; buttons; fraternity/sorority/honors society posed portraits and composites. Under the direction of Administrative Assistant Alice Knapp, VPC continued to target parents of student-athletes with e-mails providing links to game day action photos and individual posed photographs, and supervised the transition of 10 years of digital images to University Archives to preserve the photographic history of WIU.
      3. Digital Imaging Specialist II Sarah Ritter participated in events such as Grad Prep Day and Student Activities Fair to promote VPC services, and provided printing services of graduation orders and other customer requests for images and photographic prints.
      4. Larry Dean, Photographic Lab Manager, organized and photographed events to promote WIU in Macomb, WIU-QC and the extended region, and maintained the photo server.
      5. WIU Senior Photographer George Hartmann promoted VPC's services to community organizations (e.g. MHS).
      6. Brian Kreps and Neil Wiarda of VPC's Large Format division completed several large projects on campus and in the community which have brought not only increased awareness and recognition for the University, but also to VPC. Just a few examples include: recruiting prints, signage and banner stands; fraternity banners and framed prints, golf outing prints; Art Gallery door clings, wall clings, and matting, mounting and framing works in collection; athletics wall clings and prints, Western Hall academic and athletic achievement display;

MAEDCO mounted prints; MDH wall clings and display prints; and Think Purple campaign window perforated prints and wall clings for campus and community.

7. VPC's online photograph viewing website (Lightbox) has to date (March 1, 2014) 258,415 photos uploaded for the general public to view University-related images (223,897 - March 2013). An increase of 34,518 images on Lightbox added from July 1, 2013 – March 1, 2014.
  - ii. Continued University-Community Outreach Efforts/Professional Development Initiatives.
    1. VPC Photography Laboratory Manager Larry Dean has worked with photography and art classes re: photography of art work, and has served as a mentor to art and photography students. Dean is a member of the University Photographers Association of America, attending the annual conferences offered each year.
    2. VPC Senior Photographer George Hartmann worked with local school districts to provide high quality photography/large format projects to promote programs, etc. Hartmann is a member of the University Photographers Association of America, attending the annual conferences offered each year.
    3. Digital Imaging Specialist III Brian Kreps and Graphic Design Associate Neil Wiarda are members of Adobe Worldwide and attend the national conference each fall.
    4. Wiarda is currently a student in the graphic design communication bachelor's degree program.
  - e. **University Television**
    - i. Completed upgrade of television studio and field gear to HD.
    - ii. Created promotional and educational materials for the University community.
    - iii. Provided students with television media experience.
    - iv. Worked with broadcasting student interns to provide them with real-world experiences.
- C. Indicate measures of productivity by which the unit's successes can be illustrated.
- a. **Prospect Management and Research:**
    - i. Using new FPTR screen and Pentaho reporting tools, we can now track planned and actual fundraising asks as well as the outcomes of those asks from specific fundraisers.
  - b. **Annual Giving:**
    - i. Engaged 556 first-time donors via the WIU Phonathon.
    - ii. Increased direct mail revenue for the College of Business and Technology by 15%.
    - iii. Increased direct mail revenue for the College of Fine Arts and Communication by 23%.
    - iv. Increased direct mail revenue for the Bachelor of Arts in General Studies by 43%.
  - c. **Special Events:**
    - i. Positive feedback was received from attendees who included students, parents, donors, faculty, staff, and administration.
    - ii. Events fostered a sense of unity and convergence among the university and community.
  - d. **University Relations**
    - i. Successful promotion of events and announcements.
      1. Obtaining general media coverage and providing up-to-date news on wiu.edu, Facebook and Twitter feeds are essential successful elements of the UR media relations program.
      2. Well-established/long-term, strong relationships with media outlets beyond region and state - UR is typically the "go- to" for many media (including Chicago Tribune, AP and regional reporters) who are seeking expert sources, comments on statewide (or nationwide) higher ed issues, localizing national issues of significance, etc.
      3. UR staff has promoted numerous press announcements/events for major initiatives in support of the campaign, partnerships, prominent campus speakers and events, to name a few.
    - ii. Data to Support UR Promotion/Publicity Outcomes:
      1. A report from Meltwater News (UR news subscription service) indicates that from July 1, 2013 to March 1, 2014, approximately 3,700 Western Illinois University-related stories have appeared in newspapers, blogs and online publications throughout the U.S.
      2. Since the 2013 annual report (from March 1, 2013 to March 1, 2014), through University Relations subscription to Newswise, a comprehensive online database of current news, searchable archives and subscription wire services, WIU-related news stories received a total of 38,824 hits for numerous stories (compared to 36,143 from March 1, 2012-March 1, 2013, and 27,760 hits from March 1, 2011-March 1, 2012).

3. From July 1, 2013 to present (March 1, 2014), University Relations news staff wrote 600 press releases (average 50/month) [682 from July 1, 2012-March 1, 2013].
  4. Social networking success (video views – WIU YouTube Channel):
    - a. Holiday Greetings (3,294)
    - b. Success Story "quintet" (1,482)
    - c. Homecoming Preview (515)
    - d. Homecoming Post (409)
    - e. Rocky After Dark (233)
  5. See Google Analytics Data page/appendix at the end of this report.
- iii. Data to Support UR Publications Outcomes:
1. From July 1, 2013 to March 1, 2014 the Publications staff designed 97 publications, posters, billboards, ads and other projects in support of admissions/recruitment, foundation and development, marketing initiatives, alumni, financial aid, scholarship, graduate studies, WIU-QC, registrar's office, president's office and provost's office. (106 from July 1, 2012-March 1, 2013).
  2. Publications staff prepared 59 design jobs and prepared one electronic job.
  3. Publications staff prepared 35 jobs for printing, comprised of .5443 million printed pieces, from July 1, 2013 to March 1, 2014, for a total of \$103,105.85.
  4. Since Fall 2010, the Campus Connection is provided only as an e-newsletter (and PDF on the web), for an annual savings of over \$4,000 for University Relations (when Connection was printed and mailed the average annual cost was over \$4,100). Fast Facts and the campus map are also only available online rather than as print pieces, resulting in an annual savings of \$1,327 and \$934.70, respectively, for University Relations.
- e. Visual Production Center**
- i. More than 917 large format and photography jobs (an increase of 58 jobs) were completed from July 1, 2013 to March 1, 2014 at the Visual Production Center [compared to 858 from July 1, 2012-March 1, 2013]. Note: This figure does not include special events such as commencement, student athlete orders from parents, LEJA, or fraternity and sorority photos.
    1. Large Format and Photography (does not include special events):  
 July 1, 2013 to March 1, 2014: 867 jobs - project cost: \$75,556.50 (less discount \$24,637.86 = \$50,918.64 total revenue [increase of 10 jobs and decrease of \$16,593.83 revenue for July 1, 2013 to March 1, 2014 compared to July 1, 2012 to March 1, 2013].
  - ii. More than 916 special event orders were completed from July 1, 2013 to March 1, 2014. Special event orders include athlete individual and team photos, graduation, honor's convocation, posed studio portraits, LEJA internship photos, and fraternity photos.
    1. Special Event Orders:  
 July 1, 2013 to March 1, 2014: 916 jobs - project cost: \$21,482.48 (less discount \$4,73.00) = \$21,009.48 total revenue [Increase of 35 jobs and decrease of \$824.52 revenue for July 1, 2013 to March 1, 2014 compared to July 1, 2012 to March 1, 2013]
  - iii. VPC's online photograph viewing website (Lightbox) has to date (March 1, 2014) 260,816 photos uploaded for the general public to view University-related images (223,897, March 2013). An increase of 36,919 images on Lightbox added from July 1, 2013 – March 1, 2014. Revenue for Lightbox-placed orders July 1, 2013 to March 1, 2014 is \$2,619.85 for 70 orders [compared to \$1,956.88 for 76 jobs from July 1, 2012 to March 1, 2013].
- D. Describe how the division used any of the following categories of funds to enhance accomplishments and productivity:**
- a. Western Illinois University Foundation funds
    - i. Funds were used to support University and alumni events such as Rocky on Parade, the WPA Art Exhibit at the Figge Museum, restoration of artwork in the Sherman Hall Auditorium, and the John Deere Classic. Funds also supported alumni and athletic golf outings.
    - ii. Approximately \$17,000 was used to augment the marketing budget.
    - iii. Foundation funds continue to support the Memorial Tree Garden.
    - iv. Nearly \$3 million in scholarship and outside scholarship support flows through the Foundation office.
    - v. Funds were allocated to the President for travel and entertainment associated with alumni and



- development activities.
- vi. Foundation funds also supported campaign activities and travel, the annual fund, and travel and entertainment for the Vice President of Advancement and Public Services.
- vii. \$20,100 is awarded to faculty for summer research stipends.
- viii. University Television used \$20,000 from its foundation account to buy 2 computers to improve the unit's HD editing.
- b. Funds available due to vacant positions or dollars saved through hiring of new personnel at whatever level those funds reside
- c. Grants, contracts or local funds
  - i. Local funds from Visual Production Center and Printing Services were used to provide student employment and to purchase equipment and assist in other operational expenditures.
  - ii. UR Printing Services Local Funds - During FY14 (July 1, 2013 to March 1, 2014) Printing Services funds of \$7,778 have been used to purchase office supplies, portable drives, equipment repairs, a conference for Caren, Twitalyzer which was purchased with Admissions, television advertising and administrative support.
  - iii. Visual Production Center Local Funds: VPC must generate revenue to defray costs in its large format printing and photographic operations. During FY14 (July 1, 2013 to March 1, 2014) VPC has generated \$70,477.50 (July 1, 2012-March 1, 2013: \$92,712.60). Generated income at VPC is essential to operate the services of the department as there is limited appropriated funding for operational support. During FY12 (July 1, 2011 to March 1, 2012), VPC supported the division and the institution by eliminating assignment fees to all customers, and providing photographic services to University Relations and Athletic Media Services at no charge. This practice has continued through July 1-2013 – March 2014. VPC has provided \$25,110.86 in discounts and free services.
  - iv. University Television has a contract with the City of Macomb to manage Cable Channel 15 for \$12,000 and a contract with the Park District for \$1,200 per year which is deposited in the Local 3 account.
  - v. University Marketing utilized \$14,725.00 in allocated funds from University Relations/Printing Services for select television ads.
- d. Internal Reallocations: For reallocations over \$20,000, identify the amount, area that was reallocated from, and the priority that funds supported.
- e. Other fund sources

## **II. Budget Enhancement Outcomes for FY14**

For each budget enhancement received in FY14—temporary or permanent—( i.e., 1% give back, end of year money) complete an accountability report form. Be specific about approved productivity measures.

**Western Illinois University**  
Accountability Report for Program Support –FY14

I. Unit submitting report:

Development Office

II. Short title of the initiative receiving funding.

Campaign Travel and Entertainment

III. Describe the specific productivity measures achieved (refer to submitted materials the previous year, or year that funding was requested and provided).

Funding was provided for travel to cultivate, solicit, and steward donors in an effort to increase private contributions in support of Western Illinois University.

Vice President has spent \$ 8,060 through March 2014 on travel & donor cultivation/stewardship, Director of Donor Stewardship has spent \$875 through March 2014 on travel & donor cultivation, and \$23,100 has been spent on Presidential Entertainment Initiatives through March 2014, including football games, football tents, a basketball buffet, and a utility trailer.

IV. Provide a listing of all funds expended to date by the following categories:

	Enhancement	Department/Unit Funds
Personnel Services	_____	_____
Equipment and Instructional Materials	_____	_____
Library Materials	_____	_____
Contractual Services	_____	_____
Other Operating Funds – Travel and Entertainment expenses	<u>\$ 32,035</u>	_____
Total	<u><u>\$ 32,035</u></u>	<u>_____</u>

Contact Person If Questions:	<u>Brad Bainter</u>	<u>(309) 298-1808</u>
	Name	Phone Number

**Western Illinois University**  
Accountability Report for Program Support –FY4

I. Unit submitting report:

Development Office

II. Short title of the initiative receiving funding.

Campaign Initiatives

III. Describe the specific productivity measures achieved (refer to submitted materials the previous year, or year that funding was requested and provided).

Funding was provided for the following campaign initiatives:

Annual Fund	\$38,529
Pentara Newsletters	\$18,500
Presidential National Advisory Council meetings	\$ 3,900
Blackbaud software	\$ 5,665
Wealth Engine	\$ 3,300
Sumotext	\$ 3,000
Prospect PRO	\$ 3,295
Planned Giving Manager, Planned Giving Today, & GiftCalcs Plus	\$ 1,381
Data Source/Loudon	\$ 750
Advisor Newsletters	\$ 602

IV. Provide a listing of all funds expended to date by the following categories:

	Enhancement	Department/Unit Funds
Personnel Services	_____	_____
Equipment and Instructional Materials	_____	_____
Library Materials	_____	_____
Contractual Services	_____	_____
Other Operating Funds	<u>\$78,922</u>	_____
Total	<u><u>\$ 78,922</u></u>	=====

Contact Person If Questions:	<u>Brad Bainter</u>	<u>(309) 298-1808</u>
	Name	Phone Number

**Western Illinois University**  
*Accountability Report for Program Support –FY14*

I. Unit submitting report:

University Marketing

II. Short title of the initiative receiving funding.

The following initiatives were accomplished with FY14 funding for marketing: \$4,600.00 was expended for advertising on a back-lit sign in the Quad Cities Airport; \$46,342.00 spent on four 30-second videos featuring Success Story students and alumni in movie theaters in Illinois, Wisconsin, Missouri, Indiana, and Iowa; \$121,149.21 was spent on billboards around Illinois and Missouri, including \$11,317.50 for digital and scrolling signs in Illinois and Iowa stadiums and gymnasiums. \$25,566.41 was spent on promotion and marketing materials in malls and \$14,907.05 was spent on print media. \$33,440.60 was spent on television and web advertising. Think Purple promotional items, polo shirts, t-shirts, and Rocky calendars amounted to \$2,011.53. Marketing was augmented by \$12,215.00 in WIU Foundation funds for additional television, billboard, and print advertising. In addition, University Relations/Printing Services allocated \$14,725.00 for select television ads. \$250,000 was earmarked for a digital marketing campaign.

III. Describe the specific productivity measures achieved (refer to submitted materials the previous year, or year that funding was requested and provided).

Our goal has been to maintain the visibility and awareness of Western Illinois University throughout the state and region and at the same time assist and support the recruitment activities of our Admissions Office, especially in an effort to make Macomb and the Macomb region Western Illinois University territory. We have transitioned into the second phase of the Think Purple campaign, Think Success, promoting success stories of our students, athletes, alumni, and signature academic programs. We continue to use banners, wind flags, and clings, along with the shirts provided to local businesses, as a part of the local Think Purple campaign to get everyone talking and thinking Western, including guests during their visits to Macomb. Other advertising mediums such as the billboards, movie theater promotions, and mall advertising have specific landing pages in order to measure the reaction we are getting from different marketing ideas.

IV. Provide a listing of all funds expended to date by the following categories:

	Enhancement	Department/Unit Funds
Personnel Services	_____	_____
Equipment and Instructional Materials	_____	_____
Library Materials	_____	_____
Contractual Services	<u>\$248,016.50</u>	_____
Digital Marketing	<u>\$250,000.00</u>	_____
Other Operating Funds	_____	<u>\$26,940.00</u>
Total	<u><u>\$498,016.50</u></u>	<u><u>\$26,940.00</u></u>

Contact Person If Questions:	<u>Brad Bainter</u>	<u>298-1808</u>
	Name	Phone Number

**Budget Year  
Fiscal Year 2015**

**III. Major Objectives and Productivity Measures for FY15**

- A. List the most important goals and objectives the division will pursue in FY15, and how these actions will be measured/assessed.

**a. Foundation and Development**

- i. Establish new goals and objectives for the University now that the campaign is completed. Goals will be in place by July 1 and this effort will take us to the next campaign.
- ii. Fill vacant positions in the Foundation office.
- iii. Continue to work with the Director of Annual Giving to make our annual fund more cost effective in an ever-changing environment.
- iv. Increase our planned giving initiatives.

**v. Accounting and Gift Processing**

1. Continue to perform the comprehensive review of reports.
2. Continue to write policies and procedures for areas in which they are deficient.
3. Continue to enhance risk assessment initiatives.
4. Continue to enhance training materials.
5. Enhance training of support staff.
6. Participate in relevant training seminars to remain updated on key issues (GASB, FASB, IRS, etc.).

**vi. Prospect Management and Research**

1. Use wealth screening results to identify new prospects to suggest to Development Officers for addition to their portfolios for the interim campaign.
2. Begin analyzing final results of Higher Values in Higher Education capital campaign to formulate new fundraising strategies.
3. External wealth screening combined with internal predictive modeling will identify new prospects from within our current constituent base.
4. Compile Net Worth for the Top Prospects in Development Officer portfolios.
5. Convert all existing reports from Crystal Reports software to Pentaho.

**vii. Annual Giving**

1. Rebrand Annual Fund outreach into one comprehensive, University-wide effort. Assessed by increased alumni participation/monthly reports.
2. Plan and implement a 36-hour alumni-wide ask event in Spring 2015. Assessed by completion of successful event.
3. Continue efforts in establishing a culture of philanthropy among undergraduate students by leveraging students participating in direct mail/Phonathon annual fund efforts. Assessed by increased undergraduate participation/monthly reports.
4. Expand "Giving Circles" program among young alumni to leverage existing social networks and increased AF participation. Assessed by increased undergraduate participation/monthly reports.
5. Increase young alumni participation in the Annual Fund from less than 5% to 10%. Assessed by increased undergraduate participation/monthly reports.
6. Increase Phonathon revenue by 10% or greater in FY15. Assessed by monthly Phonathon/Annual Fund reports.
7. Achieve Annual Fund fulfillment rate of 85% or greater in FY15. Assessed by monthly Phonathon/Annual Fund reports.
8. Reconvene Automated Phonathon records system design team to identify and implement productivity enhancements and reporting protocol.

**viii. Special Events**

1. Continue to direct and manage traditional university events, including but not limited to Founders' Day, Major Donor Recognition Banquet, Purple & Gold Gala, Hall of Fame, scholarship banquets, groundbreakings, and facility dedications.
2. Oversee and manage presidential entertainment and chair the committee in tandem with the

President's and the University's objectives related to internal and external relations as well as development, including recommending presidential events and coordinating them with the various units of advancement.

3. Collaborate with colleges and project units throughout the University to identify themes, occasions to celebrate, execute special events in order to convey messages, foster communication with donors, and support university efforts.
4. Implement evaluation processes for ensuring that special events activities are effective in supporting the President, University Advancement units and other University units.

**b. University Marketing**

- i. Continue to increase WIU's visual presence in Macomb and west-central Illinois.
- ii. Continue efforts to increase WIU's presence throughout the state.
- iii. Begin digital marketing campaign efforts now that a marketing/digital marketing firm has been contracted to further promote WIU and guide University Marketing into the digital arena and target market media buys.
- iv. Continue efforts to increase pride for WIU both internally, and within the community and region.
- v. Develop new 15- and 30-second commercials for television, theater, digital displays, etc.
- vi. Further promote Think Purple, and further build upon the theme/branding campaign (e.g. Think Purple, Think Success tagline again for 2014-15, but with different success illustrations/demonstrations of success).

**c. University Relations**

- i. UR will continue its support of Foundation/giving initiatives. Support will be measured by the recognition and awareness of alumni, friends and general public of giving initiatives.
- ii. UR will continue to enhance Western's reputation and recognition as a top comprehensive university.
  1. Participate in initiatives through news media, social media, and other venues.
  2. Document efforts to obtain institutional recognition through news media subscription services and media exposure.
- iii. UR will obtain national recognition for its programs, students, faculty, and initiatives.
  1. Using Newswise posting services, Profnet experts database (used to promote WIU faculty as expert sources) and feature stories that illustrate WIU's commitment to its core values.
  2. UR will measure its success based on the "hits" WIU stories receive from media outlets.
- iv. Use of social media to: promote Western and its faculty, programs and services globally; further enhance Western's recognition and reputation as a quality institution to attract and retain students, faculty and staff; and to engage members of the Western community with an open platform within which they can provide feedback to the institution and ask questions.
  1. The implementation of social media also supports the strategic plan goal of encouraging the integration of technology to support the University's mission. UR will measure its success based on the "likes" and interaction received via social media outlets.
- v. University Relations staff will further enhance its publications program, and will continue to produce higher quality/innovative publications, which support the strategic plan goals of attracting a diverse student body and faculty to Western.
  1. Measured by enrollment and faculty hires, as well as focus groups to rate the publications (particularly Viewbooks).
- vi. University Relations staff will continue its outstanding relationships with media outlets to promote services, events and programs.
  1. Support the strategic plan goal of public service/outreach and increased participation in University-supported events and programming.
- vii. University Relations staff will work to further develop and implement University marketing initiatives as outlined in the strategic plan.
  1. Print publications, visual images and features stories. These are short-, mid- and long-term goals.

**d. Visual Production Center**

- i. VPC will continue to provide outstanding customer service and provide new products to promote the institution. In addition, VPC will continue its relationship with University Archives to better determine the best method possible for archiving WIU's photographic history.
  1. Meet the needs of departments, organizations and individuals who seek visual images to

- enhance publications, websites, promotional materials, and more.
- ii. VPC will research innovative methods to market services to students and parents, as well as to the general University and local communities.
  - 1. Supports the strategic plan goal of public service/outreach and increased participation in University-supported events and programming.
- iii. VPC staff will work to further develop and implement University marketing initiatives as outlined in the strategic plan.
  - 1. Print publications, visual images and features stories. These are short-, mid- and long-term goals
- e. University Television**
  - i. In addition to ongoing goals, University Television will focus on the list below and these actions will be measured/assessed by the amount of product UTV produces, and the number of contact hours UTV has with students.
    - 1. Continue promoting Western Illinois University, all University Colleges and Departments, and the Community and West Central Illinois.
    - 2. Keep providing television media services to the university and community.
    - 3. Provide Broadcasting students practical experience in the broadcasting field.

#### IV. Technology Goals and Objectives

- A. List the most important technological goals and objectives the division will pursue in FY15, and how these will be measured/assessed.
- B. Describe how these objectives build upon goals in divisional and/or institutional strategic plans.
- C. For each technology item, indicate whether you intend to have the action completed in the short-term (next 12 months), mid-term (2-4 years), or long term (5+ years).

**a. Annual Giving:**

- i. Equip the WIU Phonathon with secure VoIP (Voice over Internet Protocol) to replace cell phone/landline usage. (short term)
- ii. Collaborate in the revision of the University online giving system to allow for successful 36-hour giving event and mobile device functionality. (short term)
  - 1. Online and mobile revisions and updates will allow for a more user friendly giving experience among current donors, and appeal to young alumni.
  - 2. Increases in online giving will impact young alumni participation rates as well as overall fulfillment rates.

**b. University Relations:**

- i. Continuing to use social media to promote Western Illinois University is an essential – and constant – technological goal for Fiscal Year 2015. Measured by hits/participation. Little cost is associated with this goal; however, software and equipment updates may be necessary. Upgrades: \$500-1,000. (short term/continuous goal)
- ii. Staying current with the latest best practices and trends for content design and display on the web, which includes but is not limited to: updating/maintaining code; multimedia use (such as embedding captioned YouTube videos into news releases, other web pages, etc.); and maintaining accessible pages per the Illinois Information Technology Accessibility Act (IITAA). Little cost is associated with this goal; however, software and equipment updates may be necessary. Upgrades: \$500-1,000. (short term/continuous goal)
- iii. Updating and maintaining design-related software for publications staff will continue to be technology-related goals for FY15. Upgrade/updates: \$1,500. (short term/continuous goal)
- iv. Continuing online news media monitoring services at current enhanced level. Enhanced Newswise: \$1,500. (short term/continuous goal)
- v. UR web services will further refine and enhance the division's online presence. (short term/continuous goal)
- vi. Develop informative and engaging content that is presented in a visually appealing, consistent and professional manner in order for the University Relations and VPAPS sites to serve as the main sources of information to a mass audience. (short term/continuous goal)

**c. University Television will:**

- i. Push to upgrade Ku-Band analog Uplink to digital.
  - 1. By upgrading the Uplink, the Athletic Department will have more access to ESPN3 which will broaden the University visual footprint and help with student recruitment.
- ii. Continue pushing towards a High Definition and Digital Broadcasting facility.
- iii. Need to purchase two more new computers and HD editing software. (12 months)
- iv. Like to add a micro-wave capable of moving HD video. (12 months)
- v. Purchase a new Marshall streaming device capable of HD. (12 months)
- vi. Add a digital Blu-Ray storage library. (12 months)
- vii. Plan on purchasing HD video recording equipment. (12 months)
- viii. Plan on purchasing HD duplication machines. (12 months)
- ix. Add HD monitors, waveform monitors. (2-4 years)
- x. Push to have Channel 3 in HD by the next year. (12 months)
- xi. Need to replace field gear (i.e. microphones, lighting). (2-4 years)
- xii. All of the UTV items above will give WIU a more professional look concerning our media outlets. UTV would also become more efficient and give students hands-on experience to the latest technologies.



## **V. Internal Reallocations and Reorganizations: Western Illinois University-Macomb**

- A. What are planned FY15 reallocations or reorganizations, including the movement of positions, upgrade of positions, creation of new positions, and/or the reallocation of personnel and/or operating funds?
  - a. UTV will replace the Chief Broadcasting Engineer due to retirement. This should save the University money by rolling back the existing engineer's salary.
  - b. The Foundation Office will replace the Director of Donor Relations due to retirement at a savings of \$25,000-\$30,000.
- B. How do these reallocations and reorganizations further Strategic Plan goals and objectives.
- C. Describe how all reallocations, permanent and temporary, will affect the unit's standard performance measures.
- D. How are you finding new funds?
  - a. Describe divisional strategies to seek additional resources (e.g., grants, Foundation)
    - i. Utilize existing prospect research tools and resources to identify new prospects at the major gifts level.
    - ii. Utilize existing prospect research resources to identify new potential sources of grant funding for college and department-level projects.
    - iii. UTV will continue to seek public and private projects that pay for services.
  - b. Provide an explanation of how additional resources would be used to enhance divisional objectives
  - c. Summarize long-term external funding goals which extend beyond FY15
  - d. Develop indicators to track attainment of goals

## **VI. Internal Reallocations and Reorganizations: Western Illinois University-Quad Cities**

- A. What are planned FY15 reallocations or reorganizations, including movement of positions, upgrade of positions, creation of new positions, and/or reallocation of personnel or operating funds.
- B. How do these reallocations and reorganizations further Strategic Plan goals and objectives.
- C. Describe how all reallocations, permanent and temporary, will affect the unit's standard performance measures.
- D. How are you finding new funds?
  - a. Describe divisional strategies to seek additional resources (e.g., grants, Foundation)
  - b. Provide an explanation of how additional resources would be used to enhance divisional objectives
  - c. Summarize long-term external funding goals which extend beyond FY15
  - d. Develop indicators to track attainment of goals

## VII. New Operating Resources

- A. Identify, in priority order, requests for additional operating funding in a spreadsheet.
- B. On this spreadsheet, please be sure to indicate whether you are seeking one-time or continuous funding. If you are seeking continuous funding, identify whether it is for a period of years or a permanent base increase.
- C. Complete an *FY15 Budget Request Form* for each request listed in “A”.

Priority	Item	Requested by	Amount	Funding type
1	Marketing Operating Funds	University Marketing	\$550,000	Continuous
1	Fundraising Initiatives	Foundation and Development	\$100,000	Continuous
1	Fundraising Travel and Entertainment	Foundation and Development	\$54,000	Continuous
2	Computer Equipment	Foundation Accounting	\$10,000	Ongoing annual

**Western Illinois University**

**Budget Request Format  
For Program Support FY15**

I. Unit submitting request: University Marketing Priority Number 1

II. Provide a short title of the initiative proposed for incremental funding.

Statewide marketing and branding initiative for the Macomb campus.

III. Provide a short description of the initiative proposed for incremental funding and how it relates to the University's goals, mission statement, or strategic plan.

The entire strategic plan requires effective marketing. This request is the minimum amount necessary to begin implementing new objectives outlined in this report.

IV. Describe the specific accomplishments, and increases in productivity expected from this initiative and how results will be measured or evaluated.

Approximately \$275,000 was expended from various sources during the FY14 academic year, with an additional \$250,000 earmarked for digital marketing. It is essential to have an increase to continue to expand and broaden the University's marketing campaign and to further enhance and refine the Think Purple, Think Success campaign. The plan for FY15 is to continue working with Media Link for Western's digital media placement plan, implementing Phases 2 and 3 of the digital marketing plan they have outlined for WIU. We wish to further enhance our digital/social media to keep pace with competing higher-education institutions. This type of targeted advertising is very costly.

V. Provide a listing of all incremental funds requested by the following categories:

Personnel Services	A/P	_____
	C/S	_____
	NTT	_____
	T/T	_____
Equipment and Instructional Materials		_____
Library Materials		_____
Contractual Services		<u>\$300,000</u>
Digital Marketing		<u>\$250,000</u>
Other Operating Funds		_____
Total		<u><u>\$550,000</u></u>

VI. Are the requested funds to be included as permanent increase in the unit's base budget?

Yes X ☐ No

VII. Will the project be supplemented by other funds? X Yes ☐ No

Contact Person If Questions: Brad Bainter 298-1808

Western Illinois University  
Budget Request Format  
For Program Support FY15

I. Unit submitting request: Development Office Priority Number 1

II. Provide a short title of the initiative proposed for incremental funding.

Fundraising Initiatives, Consulting Services, Mailings for Planned and Major Giving, and Assistance with Increased Annual Fund Efforts

III. Provide a short description of the initiative proposed for incremental funding and how it relates to the University's goals, mission statement, or strategic plan.

Provide for donor research services that provide important information about prospects for Development Officers and Annual Fund initiatives. Also, provide for informative planned and major giving materials to be sent to alumni and friends and for a financial planning newsletter to be sent to attorneys and financial advisors.

IV. Describe the specific accomplishments, and increases in productivity expected from this initiative and how results will be measured or evaluated.

This will provide accurate information for Development Officers that will assist them in their process of identifying top prospects for the interim campaign period. It will also provide important information to prospects and financial advisors about the planned and major giving environment and the tax and charitable implications of making such gifts. This will lead to more productive time from our Development Officers and more contacts and contributions. It will allow us to increase the number of alumni contacted and the frequency of contact to ask for Annual Fund support.

V. Provide a listing of all incremental funds requested by the following categories:

Personnel Services	A/P	<u>                    </u>
	C/S	<u>                    </u>
	NTT	<u>                    </u>
	T/T	<u>                    </u>
Equipment and Instructional Materials		<u>                    </u>
Library Materials		<u>                    </u>
Contractual Services		<u>\$100,000</u>
Other Operating Funds		<u>                    </u>
Total		<u><u>\$100,000</u></u>

VI. Are the requested funds to be included as permanent increase in the unit's base budget?  
       Yes        X No

VII. Will the project be supplemented by other funds?        Yes        X No

Contact Person If Questions: Brad Bainter 298-1808  
Name Phone

Western Illinois University  
Budget Request Format  
For Program Support FY15

I. Unit submitting request: Development Office Priority Number 1

II. Provide a short title of the initiative proposed for incremental funding.

Fundraising Travel and Entertainment Expense

III. Provide a short description of the initiative proposed for incremental funding and how it relates to the University's goals, mission statement, or strategic plan.

Donor cultivation, solicitation, and stewardship are essential to raise private support for Western Illinois University. Private support is crucial to achieve all the goals of the University especially in light of diminishing state support.

IV. Describe the specific accomplishments, and increases in productivity expected from this initiative and how results will be measured or evaluated.

Accomplishments and increases in productivity can be measured by number of contacts with prospective donors and dollars raised.

V. Provide a listing of all incremental funds requested by the following categories:

Personnel Services	A/P	<u>                    </u>
	C/S	<u>                    </u>
	NTT	<u>                    </u>
	T/T	<u>                    </u>
Equipment and Instructional Materials		<u>                    </u>
Library Materials		<u>                    </u>
Contractual Services		<u>                    </u>
Other Operating Funds		<u>\$54,000</u>
Total		<u><u>\$54,000</u></u>

VI. Are the requested funds to be included as permanent increase in the unit's base budget?

       Yes   X   No

VII. Will the project be supplemented by other funds?        Yes   X   No

Contact Person If Questions: Brad Bainter 298-1808  
Name Phone

Western Illinois University  
Budget Request Format  
For Program Support FY15

I. Unit submitting request: Foundation Accounting Priority Number 2

II. Provide a short title of the initiative proposed for incremental funding.

Computer Equipment for VP, Foundation and Development, and Marketing areas

III. Provide a short description of the initiative proposed for incremental funding and how it relates to the University's goals, mission statement, or strategic plan.

Computer equipment is necessary for our office to function and current computer equipment is necessary for our office to be efficient.

IV. Describe the specific accomplishments, and increases in productivity expected from this initiative and how results will be measured or evaluated.

Increased productivity due to more efficient equipment.

V. Provide a listing of all incremental funds requested by the following categories:

Personnel Services	A/P	<u>                    </u>
	C/S	<u>                    </u>
	NTT	<u>                    </u>
	T/T	<u>                    </u>
Equipment and Instructional Materials		<u>\$10,000</u>
Library Materials		<u>                    </u>
Contractual Services		<u>                    </u>
Other Operating Funds		<u>                    </u>
Total		<u><u>\$10,000</u></u>

VI. Are the requested funds to be included as permanent increase in the unit's base budget?

X Yes        No

VII. Will the project be supplemented by other funds?        Yes X No

Contact Person If Questions: Holly Fecht 298-1861  
Name Phone

## **VIII. Facilities Requests**

- A. Identify, in priority order, requests for facility enhancements over \$100,000. These requests need to be identified as specific FY15 requests or long-range requests. For each request, identify the ways in which the facility enhancement will advance specific Strategic Plan goals and objectives.
- B. Provide specific outcomes for each facility enhancement request.
- C. Provide an explanation of how each facility enhancement will affect the unit's productivity measures.
- D. Complete an *FY15 Budget Request Form* for each request

## IX. Appendices

### Accounting and Gift Processing Statistics

The Foundation transactions were mostly consistent with FY13 figures, which were up substantially from FY12 and previous years due primarily to the acquisition of WQPT Television in the Quad Cities. A synopsis of some of the key transaction volumes handled by the Foundation is shown in the following charts. The most drastic change continues to be seen in credit card gift processing, number of scanned items added to the database, and the number of new records added to the Foundation Alumni Donor Database.

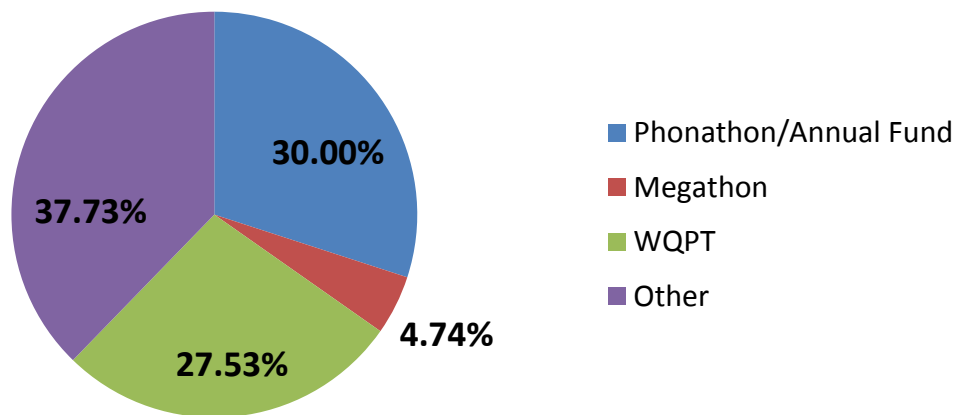
TRANSACTIONS PROCESSED				
	FY14 as of 3/3/14	FY13 as of 3/4/13	FY12 as of 3/2/12	FY11 as of 3/2/11
Direct Pay Authorizations	1,800	1,589	1,602	1,672
Checks Written	635	645	697	710
EFT payments issued	648	458	457	460
Travel Vouchers	154	111	94	105
Journal Entries	13,049	13,160	12,197	14,306
Credit card gifts	3,497	2,568	2,652	2,110
Other credit card transactions	504	311	652	469
New Accounts	524	66	48	78
Accounts on Record	1,880	1,849	1,774	1,717
Active Accounts on Record	1,542	1,527	1,483	1,481
IRS 1099's issued	7	66	61	57
Documents scanned	12,281	13,298	12,197	10,380
Cash gifts recorded	10,414	10,684	11,061	11,352
Pledges Made	4,865	4,657	8,411	12,133
Pledge Payments	9,011	8,213	8,268	8,202
Gift receipts mailed*	9,076	9,375	10,366	10,577
Gift receipt numbers issued*	19,425	18,897	19,329	19,554

\*A push is being made to convert people to annual receipts, thereby reducing the physical number of receipts printed and mailed. That is why our amount of receipt numbers issued is up and our number of receipts mailed is down.



<b>Number of Gifts from New Donors</b>				
	FY14 as of 3/2/14	FY13 as of 3/2/13	FY12 as of 3/2/12	FY11 as of 3/2/11
# gifts from New donors - Phonathon/Annual Fund	582	402	2,285	3,663
# gifts from New donors - Megathon	92	272	259	372
# gifts from New donors - WQPT	534	539	1,018	2,778
# gifts from New donors - MISC	732	614	353	301

### Percentage of Gifts from New Donors by Donor Category



<b>Number of New Donors &amp; Records</b>				
	FY14 as of 3/3/13	FY13 as of 3/2/12	FY12 as of 3/2/12	FY11 as of 3/2/11
# of new records added to the FAL	1,435	2,605	6,627	4,018
Total number of new donors	1,895	1,786	3,485	6,768*
Total value of cash gifts received from/made by new donors	\$385,740.34	\$383,754.60	\$206,185.11	\$748,674.93*

\* First year WQPT was with WIUF

During the past few years, a strong push has been made for record cleanup. Cleanup is being done to reduce inaccuracy and reduce costs by eliminating bad or inconsistent data due to lack of maintenance. Record cleanup numbers are detailed below.

<b>Record Cleanup</b>				
	FY14 as of 3/4/14	FY13 as of 6/30/13	FY12 as of 6/30/12	FY11 as of 6/30/11
Sets of Duplicate Records merged from the system	385	618	459	114
Coding businesses "out of business" as needed	147	n/a	n/a	n/a
Deceasing of records with DOD 2010-present	623	698	n/a	n/a
Deceasing of records with DOD 1990-2010	610	908	n/a	n/a
Deceasing of records with DOD 1960-1989	127	272	n/a	n/a

## Data to Support University Relations Promotion/Publicity Outcomes (from page 16)

Google Analytics Stats for University Relations' Websites

*Raw Data (includes both external and internal use)*

<b>*Measuring Period</b> <b>July 1, 2013 - March 1, 2014</b> <b>compared to</b> <b>July 1, 2012 - March 1, 2013</b>		
<b>New Releases</b> All web pages with URL: news/newsrelease.php	<b>News Page</b> URL: news/index.php	<b>University Relations Page</b> URL: vpaps/university_relations/ index.php
<b>Pageviews</b> 302,751 vs 283,229	<b>Pageviews</b> 334,682 vs 33,011	<b>Pageviews</b> 1,730 vs 1,206
<b>Unique Pageviews</b> 263,828 vs 251,050	<b>Unique Pageviews</b> 25,998 vs 22,825	<b>Unique Pageviews</b> 1,412 vs 970



**Interim Campaign Progress Report**  
July 1, 2013 - June 30, 2014

	CAS	CBT	COEHS	COFAC	Library	Honors	CIS	Student Services	QC	WQPT	Athletics	Alumni	BOI	Radio	PFA	Other	Total
<b>Pledges</b>	39,853	67,615	43,150	64,368	10,795	3,173	30,120	21,797	11,488	12,177	159,792	240	6,663	54,059	11,731	50,958	587,977
<b>Gifts</b>	263,114	313,696	334,857	164,228	8,765	5,625	11,382	18,335	49,175	387,556	64,109	14,835	7,090	300,624	650	661,896	2,605,939
<b>Gifts-in-Kind</b>	40,000	3,659	1,850	54,730	27,984	0	0	45	9,642	21,362	31,471	228	0	0	0	3,718	194,689
<b>Planned Gifts</b>	0	0	25,000	1,500,000	0	0	0	0	0	180,000	0	0	0	0	0	655,000	2,360,000
<b>Future Value</b>																	
<b>2014 Total:</b>	<b>342,967</b>	<b>364,970</b>	<b>404,856</b>	<b>1,783,326</b>	<b>47,544</b>	<b>8,796</b>	<b>41,502</b>	<b>40,176</b>	<b>70,305</b>	<b>601,094</b>	<b>255,373</b>	<b>15,303</b>	<b>13,753</b>	<b>354,683</b>	<b>12,381</b>	<b>1,371,576</b>	<b>5,746,606</b>

Outside scholarships not included in report: FY14: \$1,253,563

PURPOSE: Record of FY14 Progress by unit

AUDIENCE: Internal use for administrators and development officers

NOTES: COFAC does not include Radio; Student Services does not include Parents Fund.

Gifts in Kind do not include Service or Noncharitable Gifts in Kind

Printed on: 4/4/2014



# **Annual Fund Report** **July 1, 2013 - June 30, 2014**

	# of Pledges	Total Pledges	Average Pledge	Pledges Paid	Cash	GIK	GIK Paid	Total Gifts*
Arts and Sciences	551	40,528	74	19,860	82,716	40,000	0	142,576
Business and Technology	710	46,616	66	30,725	130,508	3,659	0	164,892
Education and Human Services	995	40,737	41	23,860	44,127	1,850	0	69,837
Fine Arts and Communication	582	61,873	106	46,152	63,304	54,730	0	164,186
Alumni	2	240	120	2,760	5,125	0	0	7,885
International Studies	1	120	120	0	6,382	0	0	6,382
Library	103	11,045	107	3,895	8,690	27,984	0	40,569
Honors	27	3,173	118	850	125	0	0	975
Quad Cities	21	4,600	219	1,750	5,120	1,046	0	7,916
Athletics	656	175,602	268	105,959	60,589	30,988	1,954	199,490
Student Services	120	11,967	100	4,306	16,835	45	0	21,186
Board of Trustees	166	6,663	40	3,900	7,090	0	0	10,990
Radio	336	54,724	163	23,130	294,749	0	0	317,878
TV (WQPT)	133	13,077	98	4,978	387,281	21,362	0	413,621
Parents	342	11,731	34	5,085	650	0	0	5,735
University Scholarships	562	41,321	74	31,585	136,201	1,945	0	169,730
Other	409	58,060	142	2,180	57,740	2,001	0	61,921
<b>Total</b>	<b>5,716</b>	<b>582,077</b>	<b>102</b>	<b>310,973</b>	<b>1,307,231</b>	<b>185,609</b>	<b>1,954</b>	<b>1,805,767</b>

Above Pledge Totals Include:

Leatherneck Club	176,202
Performing Arts Society	51,723
Library Atrium Society	10,775

Above Receipt Totals Include:

Leatherneck Club	108,463
Performing Arts Society	41,569
Library Atrium Society	4,965

**Total Annual Fund : \$2,074,916.52**

PURPOSE: Record of FY14 Annual Fund to report Unit totals includes phonathon and President's Scholarship totals

AUDIENCE: Internal use for administrators and development officers; Distributed to Board of Trustees and WIU Foundation Board

NOTES: \* Total Gifts equals Income (Cash, Pledges Paid, Gifts-in-Kind and GIK Pledges Paid).

GIK's do not include Service or noncharitable Gifts in Kind

Printed on : 4/4/2014



## Phonathon Report July 1, 2013 - June 30, 2014

	# of Pledges	Total Pledges	Average Pledge	Pledges Paid	Cash	GIK	GIK Paid	Total Gifts*
Arts and Sciences	508	24,720	49	14,140	500	0	0	14,640
Business and Technology	670	34,494	51	23,713	0	0	0	23,713
Education and Human Services	973	36,277	37	21,170	30	0	0	21,200
Fine Arts and Communication	213	8,462	40	4,985	225	0	0	5,210
Alumni	0	0	0	0	40	0	0	40
International Studies	0	0	0	0	0	0	0	0
Library	45	2,515	56	2,115	100	0	0	2,215
Honors	17	693	41	250	0	0	0	250
Quad Cities	1	50	50	50	0	0	0	50
Athletics	28	3,170	113	3,040	0	0	0	3,040
Student Services	102	4,595	45	1,240	0	0	0	1,240
Board of Trustees	161	5,880	37	3,570	0	0	0	3,570
Radio	1	25	25	25	0	0	0	25
WQPT	2	100	50	100	0	0	0	100
Parents	342	11,731	34	4,265	100	0	0	4,365
University Scholarships	490	32,237	66	26,795	1,850	0	0	28,645
Other	67	2,585	39	2,055	100	0	0	2,155
<b>Total</b>	<b>3,620</b>	<b>167,534</b>	<b>46</b>	<b>107,513</b>	<b>2,945</b>	<b>0</b>	<b>0</b>	<b>110,458</b>

**Above Pledge Totals Include:**

Leatherneck Club	3,070
Performing Arts Society	0
Library Atrium Society	2,080

**Above Receipt Totals Include:**

Leatherneck Club	2,940
Performing Arts Society	0
Library Atrium Society	1,800

**Total Phonathon : \$170,478.88**

PURPOSE: Record of FY14 Phonathon to report Unit totals

AUDIENCE: Internal use for administrators and development officers; Distributed to Board of Trustees and WIU Foundation Board

NOTES: \* Total Gifts equals Income - Gifts, Pledges Paid, Gifts-in-Kind and GIK Pledges Paid

GIK's do not include Service or noncharitable Gifts in Kind

See Annual Fund report for all phonathon and annual fund total

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