Vice President for Advancement and Public Services

Planning and Accomplishments

2010-2011
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I. Accomplishments and Productivity for FY11

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, the Scholarship Office, the Office of University Relations and the Visual Productions Center. 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:

1. Provide statewide and national leadership in reducing levels of student indebtedness and increasing cost predictability and affordability through scholarships.
2. Provide safe, accessible, responsive campus environments that meet the needs of University constituencies and reflect the core values of the University.
3. Use planning, budgeting, and reporting structures to advance University goals and accountability.
4. Prepare students to be contributing members of the WIU community.
5. Support the comprehensive campaign.
6. Increase the percentage of alumni giving to the University.

A. A brief review of the division’s goals and objectives for FY11.

1. Foundation and Development:
   a) Raise $9M in support of the Set the Standard: Higher Values in Higher Education Campaign.
   b) Continue support the efforts of the development officers.
   c) Accounting and Gift Processing:
      • Complete absorption of WQPT.
      • Promote giving by ACH transfer.
      • Complete risk assessment as mandated by auditors.
      • Finish updating and obtaining approval for policies.
      • Further automate processing where beneficial (including making phonathon paperless).
   d) Donor Relations:
      • Create individual donor stewardship plans for each major donor.
      • Implement student philanthropy program.
      • Convert scholarship database to WIU system.
• Develop new scholarship correspondence with individual student recipient information for donors.

e) Annual Fund:
• Achieve $500,000 in phonathon pledges and $2,000,000 overall annual fund pledges for FY11.
• Achieve annual fund fulfillment rate of greater than 85%.
• Streamline phonathon operations by utilizing data mining / predictive modeling information.
• Increase young alumni participation in the annual fund from less than 5% to 10%.
• Provide a vehicle for undergraduate participation in the annual fund in establishing a culture of philanthropy among current students.

f) Special Events:
• Three home football tents.
• Hall of Fame banquet.
• Scholarship banquets.
• Campaign Kickoff.
• Implementation of online registration for events.

2. Scholarship Programs:
   a) Continue to request unrestricted funds for additional scholarships to assist a diverse population of exceptional and high-need students.
   b) Move the scholarship application deadline date for new freshman from April 1 to February 15.
   c) Work with the Admissions and Financial Aid Offices to increase publicity, streamline the application process, and make earlier announcements regarding scholarships.
   d) Work collaboratively with student agencies on campus to promote scholarship opportunities.
   e) Work collaboratively with the Foundation accountant and university academic departments to identify and maximize the use of scholarship dollars, as well as to provide spending guidance to departments.
   f) Provide students with general financial aid counseling to encourage consideration of all financial aid opportunities available at WIU.
   g) Reduce paper by sending reports electronically whenever feasible. Reduce paper and associated costs (printing, postage, etc.) by restructuring publicity materials.
   h) Review all written materials for accuracy and consistency.
3. University Marketing:
   a) Goals changed with hiring of a new Vice President with the following emphases:
      • Increasing WIU’s visual presence “in our own backyard.”
      • Increasing WIU’s visibility in major markets throughout the state while promoting the “WIU student experience.”

4. University Relations:
   a) Continue support of capital campaign initiatives.
   b) Continue to enhance Western’s reputation and recognition as a top comprehensive university in the nation.
   c) Obtain national recognition for its programs, students, faculty and initiatives.
   d) Continue to use new media (social networking – e.g. Facebook, YouTube and other mediums) to promote Western and its faculty, programs and services globally, and to further enhance Western’s recognition and reputation as a quality institution to attract and retain students, faculty and staff.
   e) Further enhance its publications program.
   f) Continue its outstanding relationships with media outlets to promote services, events and programs – continue to arrange for President Al Goldfarb to meet with editorial boards of major news outlets to discuss timely topics in higher education.
   g) University Relations staff will continue to work with WIU-QC staff to enhance Western’s reputation as the only state university in the Quad Cities metro area.

5. Visual Production Center (VPC):
   a) VPC will continue to provide outstanding customer service.
   b) Will review new avenues to promote its varied services.
   c) University Relations and Visual Production Center staff will work in tandem with University Marketing to further develop and implement University marketing initiatives.

6. Specific Technology Goals:
   a) Foundation and Development – Phonathon:
      • Achieve complete automation of phonathon by 9/1/10.
      • Implement cost-effective solicitation techniques.
      • Implement next generation electronic giving.
      • Increase presence of annual fund/giving website.

   b) University Marketing:
      • Social networking and new media.
      • Improve website.
c) Scholarship Programs
   • Restructure the scholarship website to make it more user-friendly for general information and specific scholarship search functions.
   • Review all information on the website for accuracy.
   • Research the feasibility of restructuring the scholarship website by creating a scholarship database.
   • Work with AIMS to review ways to incorporate the scholarship application data into an automated system to streamline and expedite the awarding and reporting processes.

B. Most important divisional accomplishments for FY11 and Measures
   1. Foundation and Development
      a) By year end, we will have raised between $8 million and $9 million in support of the “Higher Values for Higher Education Campaign” bringing the campaign total to $45 million. Significant gifts include:
         • Major gifts:
            ─ 400 acres of farmland valued at over $3 million will support scholarships.
            ─ $100,000 was received and our alumni are matching this gift, and it will support veteran’s returning to school at Western.
            ─ $100,000 was received for scholarships for students attending the Quad Cities campus.
            ─ $50,000 was received for the purchase of new microscopes for our science programs
            ─ $40,000 was received to establish a memorial scholarship for Representative Rich Myers to support scholarships in agriculture.
            ─ Several endowments have been established with gifts of $25,000 for various areas on campus.
         • Planned Gifts:
            ─ $600,000 bequest for scholarships for the College of Arts & Sciences.
            ─ $200,000 bequest for scholarships for the Department of Art.
            ─ Several smaller bequests to establish endowments for scholarships for many different areas at Western.
         • Corporate and Foundation Funding:
            ─ Caterpillar.
            ─ Deere.
            ─ Chicago Mercantile Exchange Foundation.
            ─ Illinois Soybean Association.
         • Ways of giving:
            ─ Continue mailings for planned giving program but reduced mailing costs by mailing one issue of Pentera instead of two.
            ─ Continue to monitor the ever-changing landscape of tax incentives for
making charitable gifts to Western Illinois University.
— Continue to support the electronic transfer of stock which makes giving stocks an easy process.

b) Accounting and Gift Processing is enhancing internal policies, procedures, training materials, and process methodologies of practice.

- **Enhance data entry accuracy:**
  — Created automated system for entering pledges through the phonathon system, which allows data collected from calls to be directly imported to our system.
  — Created automated system for entering receipts received from WQPT, which allows data collected from WQPT’s system to be directly imported to our system after limited modifications.
  — Implemented a new batch process in which items loaded into the system can now be compared for accuracy at the individual batch level.
  — Enhanced data entry features which automatically add correct code preventing human error.
  — Created a new comprehensive guide for using our processing system providing detailed instructions for staff regarding how to use screens in the system.

- **Enhance efficiency and productivity in data processing procedures:**
  — Reduced number of receipts by having donors who give monthly receive one annual receipt.
  — Enhanced options so donors can request only annual receipts or no receipts at all.
  — Created automated systems for the Phonathon and WQPT - both resulted in cost savings (personnel time, paper, etc).

- **Enhance accountability:**
  — Created over 15 edit check reports to correct data entry issues.
  — Reviewed accounting standard compliance. Improved reporting mechanisms to make financial data more accurate.
  — Enhanced documentation on accounting entries to provide better transparency for auditors and more thorough documentation for staff.
  — Began implementing first phase of data security procedures to remove Social Security numbers from all data.
  — Reviewed and wrote policies and procedures a part of a long-term project to ensure there is a standard and legal “best” practice for routine transactions or situations that may arise.
  — Created a comprehensive review of reports to determine their necessity, accuracy, and proper distribution. The review will take a few years to complete, but the end goals are as follows:
1. The number of reports will be minimized in an effort to make the system more manageable by both Foundation Accounting and AIMS.
2. The creation of future reports will be monitored for practicality of creation and use to help ensure the system maintains manageable moving forward.
3. Key reports will be routinely monitored for accuracy by performing edit checks on a scheduled basis so that problems can be located and addressed in a timely manner.
   — Created a comprehensive documentation system related to donor intent to be stored in a centralized location and a summary will be viewable in the accounting system.
1. Spending will be monitored on endowment accounts to ensure accounts are being utilized and not sitting dormant or overspending.
2. Inactive accounts will no longer be inactive for several years before located and investigated.
3. Account coding will be reviewed at a regular interval to prevent the need for a mass cleanup in the future.
4. Accounting coding will be updated to be reflective of what accounts are used for – this will provide better figures for our audit report, which is keyed from these codes.
   • Enhanced training materials:
     — Created a catalog of available reports and their uses for new employees.
     — Created a user manuals for recurring activities that require special processing.
     — Created manuals using screen print option so users can navigate through screens.
     — Revised Foundation Fund Raising Policies & Administrative Procedures handbook.

c) Prospect Management and Research
   • Sent 108,573 alumni records to be scored through DataDesk and began identifying new prospects for Development Officers in each college/unit.
   • Identified more than 150 WIU alumni with High Net Worth scores, many of whom are not currently assigned to an officer. With further research many of these will serve as good additions to the prospect pool.
   • Compiled Net Worth ratings data for all FY11 Top Prospects.
   • Completed several requests for information on various prospects.
   • Began utilizing the DataDesk scores along with ProspectResearchOnline, High Net Worth scores, and Wealth Engine capacity ratings to suggest prospects to be removed from assignment.
• Updated FY11 Campaign Ask Plans for Development Officers and created reports to demonstrate their progress.
• Revised report to show how many assigned Top Prospects have had contact from a Development Officer during the year to be used as an evaluation tool as well as a planning tool for future visits.
• Completed Voluntary Support of Education (VSE) survey reporting FY10 fundraising totals as required by CASE and CAE.

d) Annual Fund and Phonathon
• Increased Phonathon call attempts to alumni through implementation of automated records system.
• Utilized social media in implementing a reconnection campaign for alumni address updates, increasing the number of solicitable records.
• Implemented new direct mail solicitation format featuring students speaking about the importance of alumni giving.
• Collaborated with AIMS, Gift and Pledge processing and Alumni Programs in the development and implementation of automated Phonathon records system.
• Reduced Phonathon operating costs by maintaining productivity goals with fewer staff in implementing the new Phonathon system.
• Reduced the usage of green bar paper records by 85% in implementing the new Phonathon system.
• Streamlined response to donor inquiries obtained via student Phonathon callers through new Phonathon system.
• Relocated Phonathon operations from Alumni House to Morgan Hall.
• Involved current students in writing direct mail solicitations.

e) Donor Relations
• Maintained timely acknowledgement of Foundation gifts. With the introduction of the new receipt format, personalized letters from VP Bainter were sent to those with gifts of $500 and above. Over 1,560 have been sent so far in FY11.
• Sent special greetings to more than 1,300 first time donors so far in FY 11.
• Coordinated with accounting for the mailing of 125 annual endowment benefactor reports. Reports are now personalized with a cover, inside letter, report and glossary.
• Coordinated the Foundation’s holiday card, gift, and poinsettia program. While we are slowly decreasing the number of cards and gifts in order to conserve resources, we still distributed 700 cards, 100 gifts, and over 40 cyclamen plants to major donors and friends of the university during the holiday season.
• Sent calendar year-end thanks and tax information to over 330 WIU employee donors. In the past, this has been done strictly for employees who
contribute via payroll deduction; now all gifts are listed on one document at year-end for any employees making multiple gifts.

- Generated monthly reports of memorial contributions to points of contact/family members.
- Corresponded with donors as accounting moved from sending monthly to annual receipts for multiple gift donors.
- Made over 40 personal stewardship calls to individual donors, with topics ranging from finalizing scholarship criteria to profile interviews to endowment agreements.
- Collaborated with University Relations to publicize major campaign gifts as they were received (18 so far in FY11).
- Coordinated details for two President’s National Advisory Council meetings.
- The annual Foundation Gift & Grant Honor Roll was not printed this year in order to conserve resources and meet the Foundation’s budget reduction. Instead, an abbreviated Year in Review was developed, made available online, and printed in very limited numbers for Foundation and Advisory Board members.
- Developed content and supervised production of four issues of Developments Newsletter. Wrote over one dozen major gift news features.
- Wrote Foundation content for Western News and arranged for two to four Foundation news features to be included in each issue.
- Arranged for (and provided) Foundation gift stories to be included in Alumni’s RockEnews.
- Completed revision of the WIU Foundation website. Site now features video from scholarship recipients, Kind & Generous video from the Campaign Kickoff, and updated campaign information.
- Facilitated membership in Tix4Cause ticket exchange website.

f) Special Events
- Hosted Campaign Kickoff, which was funded entirely by private support.
- Executed four President’s Tents during Football season and one President’s Buffet during Basketball season.
- Created the Think Purple initiative including event and WIU shirt distribution to community.
- Planned and implemented a variety of recurring events funded by the Foundation Office including: Founders’ Day, Athletics Hall of Fame Banquet, and two scholarship banquets.
- Assisted Athletics with the Purple & Gold Gala/Auction.
- Assisted with arrangements for the President’s Press Box and President’s Gallery of Seats for each home football game as part of the Presidential Entertainment Initiative.
• Positive feedback was received from attendees which include: students, parents, donors, faculty, staff, and administration.
• Events and shirt program fostered a sense of unity and convergence among the university and community.

2. Scholarship Office
   a) Changed application deadline for new freshman to an earlier date of February 15, which in turn allowed the Scholarship Office to make award announcements to students 4-6 weeks earlier than prior years.
   b) Created the Retention Assistance award using discretionary appropriated dollars to support retention for currently enrolled students.
   c) Increased assistance to students, with priority to minorities, for purchasing books using appropriated dollars.
   d) Took control of institutional student loan accounts and awarding, including the Johnston loan and new Carnes loan fund.
   e) Worked collaboratively with Billing and Receivables and AIMS to streamline short term loan accounts for better utilization of funds to students.
   f) Began a review of scholarship accounts for over and under-awarding of funds.
   g) Initiated with AIMS a new scholarship database for use in scholarship searches, data retrieval, and reports. The logic for the database was written.
   h) Initiated a re-design of the scholarship website to make it more comprehensive and user-friendly.
   i) Moved paper reports to an electronic storage and retrieval process to eliminate paper.
   j) Worked with AIMS to create three new self-submitting report jobs in TSO.
   k) Worked with AIMS to create two reports to retrieve scholarship account history.
   l) Participated in the Discover Westerns, Fall Opening Weekend, WIU Study Abroad Fair, and WIU Study Abroad How to Find Money session.
   m) Spoke to student organizations on campus.
   n) Met with various departments to train and discuss scholarships (ex. University Women).

3. University Marketing
   a) Placed WIU banners in Macomb around the Courthouse Square, Chandler Park, and North Lafayette Street.
   b) Installed two billboards at the intersection of HWY 67 and Rt. 9.
   c) Print ads in The Voice’s August “Welcome Back WIU” edition and the area Lion’s Club Annual District Calendar.
   d) Placed banner ads on The Voice’s website running in rotation from 7/1/10-6/30/11.
   e) Regional accomplishments
      • Peoria:
         — Installed three billboards in Peoria
— Showed the new :30 video ad at Peoria’s The Rave cinema and Willow Knolls
— Showed the new :30 video ad on WHOI TV.

• Springfield:
  — Showed the new :30 video ad at the Showplace Springfield12 cinemas.

• Quincy:
  — Aired the new :30 video ad during the Leatherneck Football playoff game versus Appalachian State on WGEM/FOX TV.
  — Installed billboard at Loraine.
  — Aired the new :30 video ad at the Quincy Showplace 6 cinemas.
  — Aired the new :30 video ad promoting on KHQA TV.

• Chicagoland:
  — Installed three billboards.

• Quad Cities:
  — Continued to have an illuminated sign centrally located in the Quad Cities airport in Moline.

• Summit League:
  — Provided a copy of the new :30 institutional video spot to the Summit League for inclusion in their video presentations and scrolls during March 2011 tournament games.

• Provost Office:
  — Assisted with the Provost Office’s external advertising efforts promoting summer school 2011.

• Other:
  — Utilized discussions with alumnus and marketing expert Karen Kolodzey and her husband and business partner, George Brigandi of Chicago based Brigandi + Associates to make decisions. They recommended that WIU consider strategically placed static, illuminated, billboards in order to help increase WIU’s visual presence.
  — Utilized recommendations from Joe Watts of Noel-Levitz for design and messaging. Joe suggested that WIU focus more on utilizing its students from select geographic areas as models for ads and actors in TV spots. Joe also suggested utilizing quotes from the students concerning their student experience at WIU.

4. University Relations
   a) Managed Crisis Communication regarding the Oct. 25-Nov. 11 bomb threats, as well as the subsequent publicity surrounding the FBI arrest of Kameron McKoy.
      • Coordinated & distributed emergency messages and updates.
      • Organized and hosted press conferences.
      • Responded nearly 24/7 to questions/statements on Facebook.
      • Responded to e-mails and phone calls.
      • Conducted numerous media interviews.
b) Improved Publications Initiatives:
   • Re-designed viewbooks and other publications to further meet the needs of prospective students.
   • Campus Connection went "green," being produced as an electronic newsletter only.
   • Continued to streamline other publications in an effort to save resources, including revamping Fast Facts and the campus map to online PDF versions only rather than print pieces.
   • Produced all publications as accessible PDF documents for posting on the WIU website.

c) Continued Social Media Initiatives for Marketing, Recruiting and Promotion of WIU:
   • Facebook page under the direction of Public Information Coordinator Teresa Koltzenburg:
     — Promoted institution and served as a major/main communication conduit for students, prospective students, faculty, staff, alumni and parents.
     — Met and exceeded the 10,000 like/fan-level in Fall 2010. UR coordinated and implemented a "10,000 likes campaign" to increase the number of fans/likes (as of March 1, 2011, WIU’s FB account had 11,512 likes (a 70% increase from March 2010).
   • Beyond the Belltower Blog written by Alison McGaughey, editor/public information specialist:
     — Received several hundred hits for each "off the beaten path" blog post.
   • Website redesigned for University Relations and Visual Production Center by Jessica Lambert within the University’s new Content Management System to provide a more user-friendly, interactive experience for users.

d) Promoted WIU Programs, Activities, Accomplishments:
   • Participated in national media networks through third party services to promote Western’s programs and faculty.
   • WIU students’ dinosaur dig had approximately 2,000 hits each from national/specialty/international media.
   • A series of releases, including one promoting a live video stream, re: the second blooming of the rare Corpse Flower in the WIU Greenhouse had 7,000 hits, while the video had nearly 15,000 views.
   • Coordinated interviews in which Western faculty and staff served as expert sources for such stories as Egyptian unrest, threats in schools and the psychological effects on individuals, Martin Luther King, financial aid/paying for college woes, prison systems, law enforcement, early childhood education, and more.

e) Supported University Admissions/Promotions Initiatives:
• Created a bi-weekly “What’s Happening at Western” e-newsletter, which is sent to prospective students who have been accepted, but not yet registered for classes or made housing reservations.
• Assisted with the design and publicity of VPAPS’ Think Purple Campaign.
• Assisted with the promotion for the public phase of the Set the Standard comprehensive campaign.
• Produced undergraduate viewbooks for the Macomb and Quad Cities campuses.
• Designed advertising materials (print ads, outdoor ads, taxi toppers, bus wraps, etc.).
• Coordinated and designed all Summer Session 2011 promotional ads, posters, etc., as well as releases/promotions.

f) Improved Faculty/Staff Experts File/Database to Promote WIU Experts to Media:
• Anne Wilson, staff clerk, created an experts database form and database that was used to enter information from nearly 500 WIU staff who have volunteered their expertise for media inquiries. The database will be used to create an online database for accessible, efficient expert searches by UR staff.

5. Visual Production Center
a) Aggressively increased marketing and outreach by offering new products and services:
• WIU Wall Clings, stickers and window clings, buttons.
• Fraternity/sorority/honors society posed portraits and composites.
• Parents of student-athletes with e-mails providing links to game day action photos and individual posed photographs.
• Theatre and music students’ portfolio photographs.

b) Provide quality photographs and large format projects at affordable prices.

c) Produced nearly 1,678 jobs to date.

d) Continued to Improve Customer Service Initiatives.
• Lightbox, VPC’s online photo viewing website, which to date (March 1, 2011) has 155,078 photos uploaded.

e) Improved studio quality:
• State of the art portrait lighting has been added to the VPC studio (at no cost - donated items from VPC photographer George Hartmann).
• New refinishing/retouching services further enhanced the quality of VPC’s photographs.
• New cameras and updated lenses have also afforded new possibilities for enhanced athletic photos and 360 degree photo "tours" of WIU facilities.

f) Continued to promote WIU in the large format arena.
• Brian Kreps and Neil Wiarda of have completed several large projects which have brought not only increased awareness and recognition for the University, but also to VPC.
  — Brophy Hall volleyball gym wall cling project.
  — Graphics for Western Hall scoreboard.
  — Bookstore and University Union wall clings/window clings.
  — Creating WIU banners for off campus businesses such as The Sports Corner.

C. Describe how the division used any of the following categories of funds to enhance accomplishments and productivity:

1. Western Illinois University Foundation funds
   • Alumni events
   • President’s entertainment initiative.
   • Marketing efforts
   • Scholarships
   • Summer stipends for faculty
   • “Think Purple” Campaign
   • Campus beautification
   • Memorial tree grove.

2. Funds available due to vacant positions or dollars saved through hiring of new personnel at whatever level those funds reside.
   • Alison McGaughey was audited to a Public Information Specialist in April 2010.
   • Teresa Koltzenburg was audited to a Public Information Coordinator in December 2010.

3. Grants, contracts or local funds

4. Internal Reallocations: For reallocations over $20,000, identify the amount, a area that was reallocated from, and the priority that funds supported.
• Jessica Lambert, former student graphic designer and graduate assistant in UR, was hired as a Web Support Specialist for UR and the VPAPS division in September 2010.

5. Other fund sources

Scholarships: Additional scholarship funding was made available by President Goldfarb to be used at the discretion of the scholarship director. With the approval of President Goldfarb, the majority of funds were designated to help encumbered students with registration issues.

Marketing: Depending upon the availability of funds, the office of the Vice President of Student Services may be able to make $10,000-$15,000 available for University Marketing for advertising initiatives done in consultation with Admissions. After meeting with University Marketing, Interim Director of Admissions Jessica Butcher is discussing fund availability and advertising initiative ideas with VPSS Garry Johnson.

— Vendor Supplied Added Advertising Value: During FY11, several companies supplied advertising time to WIU and University Marketing at no charge.
— The Springfield PBS station donated one full year of participation in the program at no charge. This is a value of $10,000.
— Due to the cinema companies strict video ad insertion guidelines and payment penalties and WIU’s need to submit a revised version of its :30 video ad, WIU was given two additional weeks of advertising from February 25-March 10, 2011 at all seven cineplexes at no charge. The result was $6,604 in additional advertising value from National CineMedia (NCM) plus an additional $748 in advertising value from ScreenVision for a total of $7,352.
— A gift-in-kind valued at $10,000 for marketing was used for time on Peoria’s WHOI and Quincy’s KHQA TV stations.
— Moved one of our Peoria billboards from near the Shoppes at Grand Prairie to an identically sized billboard downtown to recycle an existing vinyl sign. This resulted in a savings of $1,260 from Adams Outdoor in printing charges.
II. Budget Enhancement Outcomes for FY11

For each budget enhancement received in FY11—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 – FY11*

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.

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

<table>
<thead>
<tr>
<th>Enhancement</th>
<th>Department/Unit Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Services</td>
<td></td>
</tr>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds – Travel expenses</td>
<td>$43,200</td>
</tr>
</tbody>
</table>

*Total* $43,200

Contact Person If Questions:  

**Brad Bainter**  
(309) 298-1808

Name  
Phone Number
Western Illinois University
Accountability Report for Program Support –FY11

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).

Access to information for development officers assisted them in their process of identifying top prospects for the campaign and provided important information to prospects and financial advisors about the planned and major giving environment and the tax and charitable implications of making such gifts.

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

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<td></td>
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<td>Library Materials</td>
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<td>Contractual Services</td>
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<td>Total</td>
<td>$28,800</td>
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</tr>
</tbody>
</table>

Contact Person If Questions: Brad Bainter (309) 298-1808
Name Phone Number
Western Illinois University

Accountability Report for Program Support – FY11

I. Unit submitting report:
   Scholarship Office

II. Short title of the initiative receiving funding.
   Scholarship Enhancement Program – SEP

III. Describe the specific productivity measures achieved.
   Assisted in recruiting and retaining a more diverse and academically talented student population, and
   continued the commitment to enhance and increase campus-based scholarship opportunities for students.
   The SEP maintained the monetary integrity of WIU Scholarship Program, and expanded the impact of
   current WIU scholarships; as well as created new scholarships.
   Opportunities for prospective and currently enrolled students; expanded opportunities to assist with costs
   associated with study abroad, internships, summer school and assistance to needy students; and added more
   diversity to the scholarship recipient pool. Over 300 additional scholarship/assistance opportunities were
   possible because of the additional funding received for FY11.

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

<table>
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<td>Library Materials</td>
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</tr>
<tr>
<td>Other Operating Funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$226,000</td>
<td></td>
</tr>
</tbody>
</table>

Contact Person If Questions:  Terri Hare  298-2001
   Name  Phone Number
Western Illinois University
Accountability Report for Program Support – FY11

I. Unit submitting report: University Marketing

FY11 University Marketing initiatives for the Macomb campus. Specific initiatives and expenses include the following: Appalachian State playoff game TV ads ($250); Monthly web ads on mcdonoughvoice.com ($3,600); Print ads ($560); Stamats TeensTalk webinar ($250); Banners for the Square/Chandler Park/N. Lafayette ($4,180); Billboards near Good Hope, in Peoria, Loraine, and Chicagoland ($74,868); :30 video ad in cinemas in Quincy, Springfield, Peoria, and Chicagoland ($15,654); UTV Equipment Rental for production of video ad ($600); Postage ($556.61); QC Airport sign ($4,600); Printer cartridge ($30); University Relations design charges ($825); Banner Hardware/Poles/Brackets ($2,732.36); Pennants/Decals ($376.64); CASE conference registration ($309); Travel ($600); and Telephone ($1,000) for a Grand Total of $111,000.61.

III. Describe the specific productivity measures.

Increased focus on external institutional marketing, branding, and imaging efforts intended to appeal to WIU alumni, current students and parents, and prospective students and parents per the directive of new Vice President for Advancement and Public Services, Brad Bainter. University Marketing utilized a variety of ways to measure productivity during FY11. Methods used include the following: 1) Measuring promotional items and University service: The amount and kind that are produced/purchased during a fiscal year and the amount and kind of University service performed.; 2) Examining the reach of each form of media purchased. Most media outlets and their advertising inventory are measured using industry standards to determine the reach of their media through categories such as circulation numbers for print publications, number of viewers for TV stations and programs, and the amount of traffic on roadways where billboards are posted. Data can also be examined during the time period of the media run.; 3) Audience Surveys asking what form of media prospective students and parents have seen. This question was asked as a part of this year’s Discover Western Surveys.; 4) Driving our audience to the web through advertising messages and measuring the resulting hits on select web pages. General URL and vanity URLs were utilized for this purpose. Overall analysis of the results of these measurement methods indicate that University Marketing made sound media buys and placement decisions, stretching its limited budget as wisely and as far as it could in order to get as much exposure as possible with each buy. For a more detailed analysis of the measurement results from each of these methods, please see University Marketing’s annual report narrative.

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

<table>
<thead>
<tr>
<th>Enhancement</th>
<th>Department/Unit Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Services</td>
<td>105,436.61</td>
</tr>
<tr>
<td>Equipment and Instructional Materials</td>
<td>5,564</td>
</tr>
<tr>
<td>Library Materials</td>
<td>11,000.61*</td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>111,000.61*</td>
</tr>
</tbody>
</table>

Contact Person If Questions: Kristin Dunstan 309-298-1861

*approximately $11,000.61 is additional funding provided by the Foundation, over and above University Marketing’s appropriated $100,000 FY11 budget. Also, thanks to vendor supplied added advertising value, an additional $28,612 in free advertising was provided. Lastly, VPSS may contribute $10-15,000 for TV ads.
III. Major Objectives and Productivity Measures for FY12

1. Foundation and Development:
   a) Raise $9M in support of the Set the Standard: Higher Values in Higher Education Campaign.
   b) Implement successful faculty and staff portion of Campaign.
   c) Begin planning for completion of campaign in December of 2013.
   d) Accounting and Gift Processing will enhance internal policies, procedures, training materials, and process methodologies. Although the enactment of the entire plan will take several years to implement, the following items will take priority during the next fiscal year.
       • Increase the accuracy of data in reports.
       • Enhance the legal documentation of accounts, both endowed and non-endowed.
       • Perform the comprehensive account and report reviews.
       • Write policies and procedures for areas in which they are deficient.
       • Enhance risk assessment initiatives.
       • Enhance training materials.
       • Incorporate WQPT.
       • Enhance training of support staff.
       • Participate in relevant training seminars to remain updated on key issues (GASB, FASB, IRS, etc.).
   e) Prospect Management and Research:
       • Assist development officers with optimizing their portfolios with the best prospects at each stage of the cultivation continuum (discovery, cultivation, solicitation, stewardship)
       • Create prospect management tools
       • Implement policies and procedures
       • Refine MVS prospect management screens to include strategy and cultivation progress
       • Identify next tier of fundraising prospects to suggest to development officers for addition to their portfolios
       • Compile net worth for the top prospects in development officer portfolios
   f) Annual Fund and Phonathon:
       • Continue efforts in establishing a culture of philanthropy among undergraduate students by leveraging students participating in direct mail efforts and provide a vehicle for undergraduate participation in the Annual Fund.
       • Increase Young Alumni participation in the Annual Fund from less than 5% to 10%.
       • Continue to convene Automated Phonathon records system design team to identify and implement productivity enhancements and reporting protocol.
• Achieve $500,000 in Phonathon pledges and $2 million in overall Annual Fund pledges.
• Achieve Annual Fund fulfillment rate of 85% or greater in FY11.
• Increase Young Alumni participation in the Annual Fund from less than 5% to 10%.

**g) Donor Relations:**
• Work with college and unit Development Officers to develop individual stewardship plans for major donors.
• Maintain same level of donor stewardship and communication pieces.

**h) Special Events:**
• Three home football tents.
• Hall of Fame banquet.
• Scholarship banquets.
• Founders’ Day.
• Major Donor banquet.

**2. Scholarship Office:**
   a) Revise and update the scholarship applications for new freshman and transfers.
   b) Implement the new scholarship database.
   c) Revise and update the scholarship website.
   d) Restructure the major scholarship booklet to reduce paper while maintaining the quality and quantity of information.
   e) Continue the review of scholarship accounts for over and under-awarding of funds.
   f) Communicate issues with the department
   g) Notify departments of spending allowances prior to the new award year FY13.
   h) Continue to seek additional funding of scholarships for student recruitment and retention.

**3. University Marketing:**
   a) Increase WIU’s visual presence “in our own backyard.”
   b) Increase WIU’s visibility in major markets throughout the state while promoting the “WIU experience.”
   c) Productivity measures:
      • University Marketing can continue utilizing its FY11 measurement tools that were suggested by Brigandi + Associates to assess University Marketing’s work, the reach/amount of visibility of advertising buys, and any measurable actionable results that can be gleaned from media buys.
         — Promotional items and University service: The amount and kind that are produced during a fiscal year and the amount and kind of University service performed.
         — Examining the reach/amount of visibility for each form of media purchased.
         — Audience Surveys (“How did you hear about us/What did you see on
us?

— Driving audiences to the web through general or vanity URLs and measuring the resulting hits on select web pages.
— Student applications, student enrollment, and donations to WIU can also be measured and examined for any increases or patterns.

4. University Relations:
   a) Support the comprehensive campaign initiatives.
   b) Enhance Western's reputation and recognition as a top comprehensive university in the nation.
   c) Obtain national recognition for its programs, students, faculty and initiatives.
   d) Use social media to promote WIU.
   e) Further enhance and refine its publications program.
   f) Continue its outstanding relationships with media outlets.
   g) Work to further develop and implement University marketing initiatives as outlined in the strategic plan.

5. Visual Production Center:
   a) Provide outstanding customer service and provide new products to promote the institution.
   b) Research and evaluate new methods to promote its varied services.
   c) Further develop and implement University marketing initiatives as outlined in the strategic plan.
IV. Technology Goals and Objectives

1. Equip the WIU Phonathon with VoIP (Voice over Internet Protocol) to replace cell phone/landline usage.
2. Implement mobile giving plan.
3. Launch mobile annual fund presence.
4. Convene design team to revise present online giving site.
5. Expand use of QR (Quick Response) codes in direct mail and student philanthropy efforts.
6. Implement VDI Initiative (Variable Data Imaging) - Personalized electronic solicitations to young alumni.
7. Continue to work with University Relations and Online Students Services to implement an online registration system, calendar or events, and webpage for VPAPS/Foundation Office Events.

V. Internal Reallocations and Reorganizations: WIU-Macomb

None

VI. Internal Reallocations and Reorganizations: WIU-Quad Cities

None
**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 FY12 Budget Request Form for each request listed in “A”.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Item</th>
<th>Requested by</th>
<th>Amount</th>
<th>Funding type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Campaign Travel and entertainment</td>
<td>Foundation and Development</td>
<td>$54,000</td>
<td>Continuous through campaign</td>
</tr>
<tr>
<td>1</td>
<td>Marketing Operating Funds</td>
<td>University Marketing</td>
<td>$150,000</td>
<td>Continuous</td>
</tr>
<tr>
<td>1</td>
<td>Scholarship Enhancement Program</td>
<td>Scholarship Office</td>
<td>$525,000</td>
<td>Ongoing annual</td>
</tr>
<tr>
<td>1</td>
<td>Campaign Initiatives</td>
<td>Foundation and Development</td>
<td>$42,000</td>
<td>Continuous through campaign</td>
</tr>
<tr>
<td>2</td>
<td>Computer Equipment</td>
<td>Foundation and Development</td>
<td>$10,000</td>
<td>Ongoing annual</td>
</tr>
</tbody>
</table>
Western Illinois University
Budget Request Format
For Program Support FY11

I. Unit submitting request: Development Office  
   Priority Number 1

II. Provide a short title of the initiative proposed for incremental funding.
   Comprehensive campaign travel and entertainment expenses
   Capital Campaign 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 is 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 contact with
     prospective donors and dollars raised.

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  
   Other Operating Funds  
   Total  
   $54,000  

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

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

WIU Foundation will supplement appropriated funding.

Contact Person If Questions: Brad Bainter  
Phone: 818-08

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Western Illinois University  
Budget Request Format  
For Program Support FY11

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 annual report.

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

   University Marketing’s focus will be 1) Increasing WIU’s visual presence “in our own backyard” and 2) Increasing WIU’s visibility in major markets throughout the state while promoting the “WIU experience.” This will be accomplished through purchasing a variety of advertising media in select locations across the state such as billboards and TV and cinema video advertising. Measured by 1) Measuring promotional items and University service: The amount and kind that are produced/purchased during a fiscal year and the amount and kind of University service performed.; 2) Examining the reach of each form of media purchased. Most media outlets and their advertising inventory are measured using industry standards to determine the reach of their media through categories such as circulation numbers for print publications, number of viewers for TV stations and programs, and the amount of traffic on roadways where billboards are posted. Data can also be examined during the time period of the media run.; 3) Audience Surveys asking what form of media prospective students and parents have seen. This question was asked as a part of this year’s Discover Western Surveys.; 4) Driving our audience to the web through advertising messages and measuring the resulting hits on select web pages.

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td>$146,500</td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td>$ 3,500</td>
</tr>
<tr>
<td>Total</td>
<td>$150,000</td>
</tr>
</tbody>
</table>

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:  Kristin Dunstan  
   Phone: 8-1868
Western Illinois University
Budget Request Format
For Program Support FY11

I. Unit submitting request: Scholarship Office Priority Number 1

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

Scholarship Enhancement Program - SEP

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.

Assist recruiting and retaining a larger and more diverse student population.

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

This will maintain the monetary integrity of the WIU Scholarship program, and expand the impact of current WIU scholarships. Results will be measured by increase in opportunities and the number of recipients.

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

<table>
<thead>
<tr>
<th>Personnel Services</th>
<th>A/P</th>
<th>C/S</th>
<th>NTT</th>
<th>T/T</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

$525,000

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

Scholarship money is also awarded through outside scholarship and foundation funds.

Contact Person If Questions:  Terri Hare Phone: 8-2001
Western Illinois University
Budget Request Format
For Program Support FY11

I. Unit submitting request: Development Office Priority Number 1

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

Campaign Initiatives, Consulting services and Mailings for Planned and Major Giving

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. 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 campaign. 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.

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

<table>
<thead>
<tr>
<th>Personnel Services</th>
<th>A/P</th>
<th>C/S</th>
<th>NTT</th>
<th>T/T</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Equipment and Instructional Materials</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Materials</td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td>42,000</td>
</tr>
<tr>
<td>Total</td>
<td>$42,000</td>
</tr>
</tbody>
</table>

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

Yes ☑ No

VII. Will the project be supplemented by other funds?

Yes ☑ No

Contact Person If Questions: Brad Bainter Phone: 818-08
Western Illinois University  
Budget Request Format  
For Program Support FY11

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 Scholarship areas. Funding has previously been provided by one-time surplus money.

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:

<table>
<thead>
<tr>
<th>Personnel Services</th>
<th>A/P</th>
<th>C/S</th>
<th>NTT</th>
<th>T/T</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>10,000</td>
<td></td>
<td></td>
<td></td>
<td>$10,000</td>
</tr>
</tbody>
</table>

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
     If yes, please describe:

Contact Person If Questions:  Holly Fecht ___________________________ Phone: 8-1861
VIII. Facilities Requests

A. Identify, in priority order, requests for facility enhancements over $100,000. These requests need to be identified as specific FY12 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 FY12 Budget Request Form for each request.

<table>
<thead>
<tr>
<th></th>
<th>Phonathon relocation</th>
<th>Foundation</th>
<th>$154,904</th>
<th>One time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Western Illinois University
Budget Request Format
For Program Support FY11

I. Unit submitting request: Development Office
   Priority Number 1

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

   Relocate Phonathon

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.

   To increase private support for Western. The phonathon has temporarily been moved to Morgan Hall. We propose to move it to Physical Plant East which would free up space on campus and provide a safer environment for the student callers and a place to store equipment.

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

   A better environment with additional calling centers will provide for more contacts made with our alumni and friends which will in turn increase the effectiveness of the fundraising.

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
   $154,904

   Other Operating Funds

   Total
   $154,904

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  Phone: 8-1808
The Foundation experienced a large growth in transactional processing during FY11, which was due primarily to the acquisition of WQPT Television in the Quad Cities. A synopsis of some of the key transaction volume handled through the Foundation is shown in the following charts. The most drastic changes were in credit card gift processing, which nearly doubled from prior year activity, as well as the number of new donors and number of new records added to the Foundation Alumni Donor Database – all of these increases were a direct result of the addition of WQPT.

<table>
<thead>
<tr>
<th>TRANSACTIONS PROCESSED</th>
<th>FY11 as of 3/2/11</th>
<th>FY10 as of 3/10/10</th>
<th>FY09 as of 3/10/09</th>
<th>FY08 as of 3/5/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Pay Authorizations</td>
<td>1,672</td>
<td>1,688</td>
<td>1,978</td>
<td>2,232</td>
</tr>
<tr>
<td>Checks Written</td>
<td>710</td>
<td>678</td>
<td>730</td>
<td>892</td>
</tr>
<tr>
<td>EFT payments issued</td>
<td>460</td>
<td>511</td>
<td>573</td>
<td>531</td>
</tr>
<tr>
<td>Travel Vouchers</td>
<td>105</td>
<td>93</td>
<td>90</td>
<td>123</td>
</tr>
<tr>
<td>Journal Entries</td>
<td>14,306</td>
<td>13,674</td>
<td>13,173</td>
<td>12,298</td>
</tr>
<tr>
<td>Credit card gifts</td>
<td>2,110</td>
<td>1,235</td>
<td>1,121</td>
<td>1,252</td>
</tr>
<tr>
<td>Other credit card transactions</td>
<td>469</td>
<td>954</td>
<td>1,770</td>
<td>1,295</td>
</tr>
<tr>
<td>New Accounts</td>
<td>78</td>
<td>62</td>
<td>76</td>
<td>100</td>
</tr>
<tr>
<td>Accounts on Record</td>
<td>1,717</td>
<td>1,668</td>
<td>1,592</td>
<td>1,516</td>
</tr>
<tr>
<td>Active Accounts on Record</td>
<td>1,481</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>IRS 1099’s issued</td>
<td>57</td>
<td>52</td>
<td>63</td>
<td>56</td>
</tr>
<tr>
<td>Documents scanned</td>
<td>10,380</td>
<td>7,728</td>
<td>9,905</td>
<td>7,314</td>
</tr>
<tr>
<td>Cash gifts recorded</td>
<td>11,352</td>
<td>8,037</td>
<td>7,355</td>
<td>7,628</td>
</tr>
<tr>
<td>Pledges Made</td>
<td>12,133</td>
<td>14,806</td>
<td>14,005</td>
<td>12,522</td>
</tr>
<tr>
<td>Pledge Payments</td>
<td>8,202</td>
<td>9,100</td>
<td>10,161</td>
<td>10,662</td>
</tr>
<tr>
<td>Gift receipts mailed</td>
<td>10,577</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Gift receipts numbers issued</td>
<td>19,554</td>
<td>17,251</td>
<td>17,093</td>
<td>18,250</td>
</tr>
</tbody>
</table>
### Number of New Donors

<table>
<thead>
<tr>
<th></th>
<th>FY11 as of 3/10/11</th>
<th>FY10 as of 3/10/10</th>
<th>FY09 as of 3/10/09</th>
<th>FY08 as of 3/5/08</th>
</tr>
</thead>
<tbody>
<tr>
<td># gifts from New donors - Phonathon</td>
<td>3,663</td>
<td>4,866</td>
<td>4,533</td>
<td>3,295</td>
</tr>
<tr>
<td># gifts from New donors - Megathon</td>
<td>372</td>
<td>564</td>
<td>470</td>
<td>556</td>
</tr>
<tr>
<td># gifts from New donors - WQPT</td>
<td>2,778</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td># gifts from New donors - MISC</td>
<td>301</td>
<td>408</td>
<td>437</td>
<td>1,353</td>
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<tr>
<td># of new records added to the FAL</td>
<td>4,018</td>
<td>3,354</td>
<td>2,874</td>
<td>4,214</td>
</tr>
</tbody>
</table>

### % of Gifts from New Donors by Donor Category FY11

- Phonathon: 51.49%
- Megathon: 4.23%
- WQPT: 39.05%
- Other: 5.23%
## Spending Allocation Year End 2011
### University Scholarship Activities 3/18/2011

<table>
<thead>
<tr>
<th>Amount</th>
<th># Recipients</th>
</tr>
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<tbody>
<tr>
<td>PMGAP/Western Educational Opportunity Grants</td>
<td>$47,900</td>
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<tr>
<td>Presidential/Foundation/DuSable Scholarships</td>
<td>$84,000</td>
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<tr>
<td>WIU Foundation Scholarships</td>
<td>$946,008</td>
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<td>Outside Scholarships through WIU Foundation</td>
<td>$978,713</td>
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<tr>
<td>Al Goldfarb Scholarship</td>
<td>$21,000</td>
</tr>
<tr>
<td>Unrestricted Scholarship Funds: (President's Office, WIU Foundation Scholarships)</td>
<td>$185,584</td>
</tr>
<tr>
<td>Minority Achievement Books</td>
<td>$41,557</td>
</tr>
<tr>
<td>Minority Achievement Special Assistance (primarily book purchase for one semester)</td>
<td>$63,393</td>
</tr>
<tr>
<td>Retention Assistance (New)</td>
<td>$33,816</td>
</tr>
<tr>
<td>Short Term Loans</td>
<td>$119,629</td>
</tr>
<tr>
<td>Johnston/Carnes Institutional loans</td>
<td>$23,200</td>
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<tr>
<td>Bright Start Scholarship--State of Illinois</td>
<td>$17,000</td>
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<tr>
<td>Student Services:</td>
<td></td>
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<tr>
<td>Residential Scholar Initiative Program</td>
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<td>Academic Promise</td>
<td>$15,000</td>
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<tr>
<td>Minority Access for Achievement</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Total to Date</strong></td>
<td><strong>$2,957,294</strong></td>
</tr>
</tbody>
</table>

Allocated to be spent from President's funds:

| Summer 2011 | $50,000 |
| Retention Assistance (encumbrance for registration) | $130,000 |
| Special Assistance | $18,551 |
| License Plate Money for scholarship | $10,000 |
| **Total to be Awarded** | **$208,551** |
### Set the Standard - Higher Values in Higher Education

#### Campaign Progress Report
July 1, 2010 - June 30, 2011

<table>
<thead>
<tr>
<th></th>
<th>CAS*</th>
<th>CBT</th>
<th>COHIS</th>
<th>COFAC</th>
<th>Library</th>
<th>Honors</th>
<th>CIS</th>
<th>Student Services</th>
<th>QC</th>
<th>WQPP</th>
<th>Athletics</th>
<th>Alumni</th>
<th>BOT</th>
<th>Radio</th>
<th>Parents</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pledges</strong></td>
<td>74,833</td>
<td>186,720</td>
<td>65,317</td>
<td>87,835</td>
<td>83,629</td>
<td>5,640</td>
<td>26,000</td>
<td>6,595</td>
<td>89,189</td>
<td>0</td>
<td>265,746</td>
<td>12,406</td>
<td>11,983</td>
<td>4,916</td>
<td>38,256</td>
<td>70,827</td>
<td>1,009,592</td>
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<tr>
<td><strong>Gifts</strong></td>
<td>229,087</td>
<td>522,225</td>
<td>139,522</td>
<td>128,920</td>
<td>10,112</td>
<td>17,559</td>
<td>26,675</td>
<td>10,337</td>
<td>9,375</td>
<td>361,110</td>
<td>99,880</td>
<td>16,715</td>
<td>4,223</td>
<td>182,472</td>
<td>8,720</td>
<td>440,853</td>
<td>2,001,228</td>
</tr>
<tr>
<td><strong>Gifts-in-Kind</strong></td>
<td>5,921,140</td>
<td>3,370</td>
<td>320</td>
<td>42,622</td>
<td>23,685</td>
<td>0</td>
<td>0</td>
<td>1,151</td>
<td>635</td>
<td>26,690</td>
<td>43,282</td>
<td>671</td>
<td>0</td>
<td>0</td>
<td>16,486</td>
<td>3,189,798</td>
<td></td>
</tr>
<tr>
<td><strong>Testamentary - PY</strong></td>
<td>600,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1,000,000</td>
</tr>
<tr>
<td><strong>Testamentary - FY</strong></td>
<td>600,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1,000,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>3,320,847</td>
<td>611,651</td>
<td>302,656</td>
<td>268,506</td>
<td>98,205</td>
<td>21,440</td>
<td>51,675</td>
<td>16,588</td>
<td>99,159</td>
<td>412,432</td>
<td>400,269</td>
<td>38,792</td>
<td>16,165</td>
<td>186,979</td>
<td>45,014</td>
<td>1,528,396</td>
<td>7,670,817</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>Campaign Goal</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Campaign Goal</strong></td>
<td>14,000,000</td>
<td>16,000,000</td>
</tr>
<tr>
<td><strong>Campaign to Date</strong></td>
<td>7,902,328</td>
<td>7,712,061</td>
</tr>
<tr>
<td><strong>% to Goal</strong></td>
<td>54.45%</td>
<td>39.80%</td>
</tr>
</tbody>
</table>

Outside scholarships not included in report
FY11: 995,325.06
Total since 7/1/2005: 5,660,273.02

* CAS Gift in kind contains estimate of $3,000,000 for land. This will be updated once appraisal is finalized.

**NOTE**: This report is intended for administrative and development officers.

**Purpose**: Record of FY11 Campaign Goals and Progress by unit and tracks overall Campaign Goals and Progress by unit.

**Audience**: Internal use for administrators and development officers.

**Notes**: CAS does not include GRP. Student Services does not include Parent Fund.

**Total equals Pledges, Cash, Gifts-in-Kind (which do not include services in non-charitable GIFs) and Face Value testamentary gifts.**

For individual development officer contacts and metrics, see Development Officer Matrix.

*Document includes outside scholarships and includes Fall 2011 Trust and $2M planned gift.*

*Prepared on: 4/15/2011*
## Annual Fund Report
### July 1, 2010 - June 30, 2011

<table>
<thead>
<tr>
<th>Category</th>
<th># of Pledges</th>
<th>Total Pledges</th>
<th>Average Pledge</th>
<th>Pledges Paid</th>
<th>Cash</th>
<th>GIK</th>
<th>GIK Paid</th>
<th>Total Gifts*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Sciences</td>
<td>854</td>
<td>48,553</td>
<td>57</td>
<td>25,648</td>
<td>154,263</td>
<td>0</td>
<td>0</td>
<td>179,911</td>
</tr>
<tr>
<td>Business and Technology</td>
<td>1,215</td>
<td>66,485</td>
<td>55</td>
<td>51,334</td>
<td>126,217</td>
<td>0</td>
<td>0</td>
<td>177,551</td>
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<td>1,747</td>
<td>67,892</td>
<td>39</td>
<td>40,732</td>
<td>77,452</td>
<td>320</td>
<td>0</td>
<td>118,484</td>
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<tr>
<td>Fine Arts and Communication</td>
<td>761</td>
<td>80,038</td>
<td>105</td>
<td>32,505</td>
<td>99,711</td>
<td>12,242</td>
<td>0</td>
<td>144,458</td>
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<tr>
<td>Alumni</td>
<td>240</td>
<td>16,233</td>
<td>66</td>
<td>9,709</td>
<td>12,775</td>
<td>0</td>
<td>0</td>
<td>22,484</td>
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<tr>
<td>International Studies</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2,175</td>
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<td>2,175</td>
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<tr>
<td>Library</td>
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<td>20,534</td>
<td>226</td>
<td>0</td>
<td>22,820</td>
<td>9,337</td>
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<tr>
<td>Honors</td>
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<td>57</td>
<td>150</td>
<td>2,800</td>
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<tr>
<td>Quad Cities</td>
<td>14</td>
<td>6,005</td>
<td>429</td>
<td>1,165</td>
<td>4,325</td>
<td>639</td>
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<td>Athletics</td>
<td>619</td>
<td>240,206</td>
<td>388</td>
<td>64,968</td>
<td>127,944</td>
<td>1,715</td>
<td>300</td>
<td>194,927</td>
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<tr>
<td>Student Services</td>
<td>76</td>
<td>4,299</td>
<td>57</td>
<td>4,460</td>
<td>10,262</td>
<td>1,191</td>
<td>0</td>
<td>15,914</td>
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<tr>
<td>Board of Trustees</td>
<td>314</td>
<td>11,963</td>
<td>38</td>
<td>7,762</td>
<td>4,055</td>
<td>0</td>
<td>0</td>
<td>11,817</td>
</tr>
<tr>
<td>Radio</td>
<td>30</td>
<td>3,588</td>
<td>120</td>
<td>2,322</td>
<td>179,160</td>
<td>0</td>
<td>0</td>
<td>181,482</td>
</tr>
<tr>
<td>TV (WQPT)</td>
<td>40</td>
<td>4,586</td>
<td>115</td>
<td>3,535</td>
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<td>13,521</td>
<td>6,665</td>
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<td>300</td>
<td>20,486</td>
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<tr>
<td>University Scholarships</td>
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<td>17,423</td>
<td>69,583</td>
<td>0</td>
<td>0</td>
<td>87,005</td>
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<tr>
<td>Other</td>
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<td>13,365</td>
<td>74</td>
<td>10,334</td>
<td>266,025</td>
<td>17,159</td>
<td>0</td>
<td>283,118</td>
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<tr>
<td><strong>Total</strong></td>
<td>7,736</td>
<td>643,306</td>
<td>83</td>
<td>285,489</td>
<td>1,166,861</td>
<td>42,823</td>
<td>600</td>
<td>1,495,773</td>
</tr>
</tbody>
</table>

### Above Pledge Totals Include:
- Western Athletic Club: 229,091
- Performing Arts Society: 60,820
- Library Alumni Society: 19,024

### Above Receipt Totals Include:
- Western Athletic Club: 134,380
- Performing Arts Society: 26,333
- Library Alumni Society: 5,866

### Total Annual Fund: $1,852,991.05

**NOTES:**
- Total Gifts equals Income - Gifts, Pledges Paid, Gifts-in-Kind and GIK Pledges Paid
- GIK’s do not include Service or non-charitable Gifts in Kind
- Total, Pledges, Gifts and GIK’s (do not include pledges or GIK pledges Paid to avoid double counting)

Printed on: 4/12/2011
## Phonathon Report

**July 1, 2010 - June 30, 2011**

<table>
<thead>
<tr>
<th></th>
<th># of Pledges</th>
<th>Total Pledges</th>
<th>Average Pledge</th>
<th>Pledges Paid</th>
<th>Cash</th>
<th>GIK Paid</th>
<th>Total Gifts*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Sciences</td>
<td>844</td>
<td>46,488</td>
<td>55</td>
<td>24,896</td>
<td>225</td>
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</tr>
<tr>
<td>Business and Technology</td>
<td>1,206</td>
<td>60,220</td>
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<td>45,478</td>
<td>1,185</td>
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<tr>
<td>Education and Human Services</td>
<td>1,726</td>
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<td>39</td>
<td>38,149</td>
<td>200</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Fine Arts and Communication</td>
<td>381</td>
<td>14,263</td>
<td>37</td>
<td>8,678</td>
<td>25</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Alumni</td>
<td>227</td>
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<tr>
<td>International Studies</td>
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<tr>
<td>Library</td>
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<tr>
<td>Quad Cities</td>
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<tr>
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<tr>
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<tr>
<td>Board of Trustees</td>
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<td>0</td>
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<tr>
<td>Radio</td>
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<tr>
<td>WQPT</td>
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<td>0</td>
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<tr>
<td>University Scholarships</td>
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<td>48</td>
<td>16,583</td>
<td>100</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Other</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>51</strong></td>
<td><strong>201,304</strong></td>
<td><strong>2,160</strong></td>
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</tr>
</tbody>
</table>

 Above Pledge Totals Include:

 Western Athletic Club 31,400
 Performing Arts Society 0
 Library Alumni Society 920

 Above Receipt Totals Include:

 Western Athletic Club 26,225
 Performing Arts Society 33
 Library Alumni Society 730

 Total Phonathon: $341,471.98

**PURPOSE:** Record of FY11 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

 Total: Pledges, Gifts and GIKS (does not include pledges or GIK, pledges Paid to avoid double counting)

 See Annual Fund report for all phonathon and annual fund total

 Printed on: 4/12/2011