THINK PURPLE
THINK ACCOMPLISHMENTS
THINK WESTERN

OFFICE OF THE VICE PRESIDENT FOR ADVANCEMENT AND PUBLIC SERVICES
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I. Accomplishments and Productivity for FY12

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.
7. Consult with external advisory board to help advance the academic mission and service operations of Western Illinois University.

A. A brief review of the division’s goals and objectives for FY12.

1. Foundation and Development
   a) Raise $9M in support of the 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 the Development Officers’ portfolios.
f) Annual Fund and Phonathon:
• Achieve $325,000 in Phonathon pledges and $2 million in overall Annual Fund pledges.
• Achieve Annual Fund fulfillment rate of 85% or greater in FY12.
• Increase Young Alumni participation in the Annual Fund from less than 5% to 10%.
• Create a culture of philanthropy among undergraduate students through student involvement in Annual Fund’s direct mail efforts.
• Design/provide a vehicle for undergraduate participation in Annual Fund.
• Continue to convene Automated Phonathon Records System Design Team to identify and implement productivity enhancements and reporting protocol.
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
• Think Purple! Event(s)
2. Scholarship Office:
   a) Seek additional funding of scholarships for student recruitment and retention.
   b) Analyze processes to enable best use of student and campus resources.
   c) Educate students about scholarships.

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 FY12 measurement tools that were suggested by Brigandi + Associates to assess University Marketing’s work, the reach/amount of visibility of advertising buys, and any measureable 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.
B. Most important divisional accomplishments for FY12 and Measures

1. Foundation and Development
   a) By year end, we will have raised between $7 million and $8 million in support of the “Higher Values for Higher Education Campaign” bringing the campaign total to $50 million. Significant gifts include:
      • Major gifts:
        $455,000 Estate of Gladys Anderson
        $97,000 Estate of Dorothy Bates Jessee
        $48,000 Estate of Gil Belles
        $269,000 Estate of Mary Mabon
        $50,000 Kay Kennedy
        $50,000 Don & Sharon Tomnitz
        $100,000 Dan Webb

      • Planned Gifts:
        $2,500,000 Tate Lindahl

      • Corporate and Foundation Funding:
        $91,500 Caterpillar
        $20,100 Chicago Mercantile Exchange Group Foundation
        $20,000 Country Financial Services
        $25,000 Doris & Victor Day Foundation
        $50,050 Hubbell-Waterman Foundation
        $100,000 Lowell N. Johnson Charitable Foundation
        $27,000 Modern Woodmen of America
        $181,250 Moline Foundation
        $33,300 John Deere Foundation
        $20,000 Verizon

      • Developed and Implemented Text-for-Giving

      • Ways of Giving:
        — Continued mailings for planned giving program but reduced mailing costs by mailing one issue of Pentera instead of two.
        — Continued to monitor the ever-changing landscape of tax incentives for making charitable gifts to Western Illinois University – particularly in regards to gifts from IRA’s.
        — Continued to promote 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.

- **Enhanced data entry accuracy:**
  - Created automated system for entering Quid Pro Quo receipts
  - Merged records are now being handled in a way that ensures donor receipt history is accurate after a merge occurs. A comprehensive cleanup of prior years dating back to the 1970’s is underway to ensure giving history and reports are accurate.
  - The year-end tax receipt job was re-written to allow for many modifications from prior reports to make receipts easier to read and compliant with IRS regulations.
  - Several hard coded features continue to be added to our gift processing system to prevent erroneous entries.
  - Deleted and written off pledges are now stored in our history screen to allow for better tracking and improved reconciliation of pledges receivable.
  - Over 75,000 zip-codes were modified to reflect standardized USPS zip+4 addresses required by DPS in mailing (DPS previously had to run any missing addresses through their system prior to mailing).
  - 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.

- **Enhanced efficiency and productivity in data processing procedures:**
  - An external software package used for calculating and allocating interest distributions and market values on endowed funds was written internally in Excel at a cost savings of over $7,000 per year and a time savings of over 30 hours per year.
  - A scholarship screen was created that enabled the Scholarship Director to enter scholarship recipients and a “review” feature is now performed by Foundation Accounting. Previously the Scholarship Director typed up a list and Foundation Accounting re-entered the sheet into the system.
  - Several system improvements have been made to auto-add data to a system based on an entry on another screen or field.
  - Foundation Accounting has written macros in Excel for routine data processing jobs that were previously manual resulting in drastic decreases in labor necessary to facilitate such tasks. Such jobs can now be completed in seconds by simply pressing the macro.

- **Enhanced 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 as 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 remains 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 overspent.
  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. Account 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:
  — User manuals continue to be created for several recurring activities that require special processing. Additional focus needs to be made to ensure documentation remains up-to-date.
  — Screen print adapted manuals are being created for users of the system to help them navigate through screens. Manuals continue to be modified to ensure system enhancements remain.
  — Field help features are being implemented in several database screens to provide quick answers to database entry questions.
c) Prospect Management and Research
- Utilized DataDesk software to create a donor model for 110,714 alumni records
- Identified the Top 1% of potential donors within the database through DataDesk scoring model
- Completed requests for information on various prospects for the Development Officers
- Updated FY12 Campaign Ask Plans for Development Officers and created reports to demonstrate their progress
- Revised reports to show how Top Prospects have been moving through the pipeline
- Completed Voluntary Support of Education (VSE) survey reporting FY11 fundraising totals as required by CASE and CAE
- Completed CASE Campaign Survey reporting progress on the Capital Campaign
- Wrote *Getting Started in Prospect Research*, a how-to manual published by Charity Channel Press, November 2011

d) Annual Fund and Phonathon
- Expanded direct mail solicitation featuring students telling their personal stories about the impact of annual giving to current and potential donors.
- Launched “Text-to-Give” capabilities which will serve as one of several vehicles for undergraduate participation in the Annual Fund.
- Collaborated with University Relations in developing the Annual Fund Mobile Giving presence which will serve as a second vehicle for undergraduate Annual Fund participation.
- Achieved 497 Phonathon gifts fulfilled by credit card (51% increase over FY11)
- Achieved $28,999 in fulfilled Phonathon revenue via credit card (49% increase over FY11)
- Collaborated with University Relations in enhancing the WIU Annual Fund online presence.
- Achieved $21,185 in matching gift revenue (36.8 % increase over FY11)
- Reduced Phonathon operating costs by maintaining productivity goals with fewer staff in implementing the new Phonathon System.
- Collected over 4,000 new e-mail addresses from friends and alumni.
- Engaged 984 new Annual fund donors via Phonathon and direct mail.
- Engaged over 800 parents and family members of students in the Annual Fund.
- Achieved over $200,000 in Phonathon pledges with two months remaining in campaign.
- Achieved $1,570,264 in total Annual Fund paid pledges, cash received and gifts-in-kind.
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 1,500 have been sent so far in FY12.
- Sent special greetings to approximately 1,800 first time donors so far in FY12.
- Sent calendar year-end thank yous and tax information to over 290 WIU employee donors and 250 non-employee donors. Corresponded with donors who make multiple gifts in a year as they are moved from individual to annual receipts.
- Coordinated with Accounting for the mailing of over 125 annual endowment benefactor reports. Reports are now personalized with an individualized cover, inside letter, report and glossary.
- 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 nearly 800 cards, 100 gifts, and over 40 Kalanchoe plants to major donors and friends of the university during the holiday season.
- Generated monthly reports of memorial contributions to points of contact/family members.
- Made over 45 personal stewardship visits to individual donors, with topics ranging from finalizing scholarship criteria to profile interviews to endowment agreements. These are the “documented” visits qualifying as contact reports. Phone calls, emails and informal visits with donors occur on a daily basis.
- Collaborated with University Relations to publicize major campaign gifts as they were received (11 so far in FY12).
- Wrote press releases for all Foundation gift stories and events.
- 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.
- Developed content & supervised production of FY11 Foundation Year in Review, available online. Limited copies were printed and distributed to Foundation Board and President’s National Advisory Council members.
- Coordinated details, handled communications and attended two President’s National Advisory Council meetings.
- Consulted with Department of Recreation, Park & Tourism Administration on development of a minor in fundraising.
f) Special Events
   • Executed four President’s Tents during Football season and one President’s Buffet during Basketball season.
   • Planned and implemented a variety of recurring events funded by the Foundation Office including: Athletics Hall of Fame Banquet, and two Scholarship Banquets.
   • Assisted Athletics with the Purple & Gold Gala/Auction.
   • Provided support for events associated with Think Purple!
   • 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.
   • Contributed to the planning and execution of the logistics and events surrounding the Founders’ Day Ceremony which was held in conjunction with Dr. Thomas’ Inaugural Celebration.
   • Worked with University Relations to implement an online registration system, calendar of events and webpage for VPAPS/Foundation Office Events.

2. Scholarship Office
   a) The Scholarship/Foundation Office disbursed over $3M in competitive, academic scholarships
   b) Hired a student employee/graduate assistant to begin a year-long scholarship criteria research project and to enter the criteria into the new scholarship database
   c) Took over the responsibility of building all campus scholarship recipient information into database in order to credit student accounts
   d) Created a new online Scholarship Disbursement Form for campus use in reporting scholarship recipients
   e) Increased assistance to students, with priority to minorities, for purchasing books using appropriated dollars
   f) Created Special Books Assistance application and criteria
   g) Revised the freshman and new transfer Master Scholarship Application to create a uniform version on both paper and in electronic format
   h) Continued to review scholarship accounts for over and under-awarding of funds
   i) Served on Scholarship Committee for the National Association of Letter Carriers
   j) Worked with webmaster to create a web outline of re-designed scholarship website using CMS
   k) Participated in the Discover Westerns, Fall Opening Weekend, WIU Study Abroad Fair, and WIU Study Abroad How to Find Money session
   l) Traveled to participate in Scholarship Fair (Sugar Grove, IL)
   m) Spoke to student organizations on campus
n) Met with various departments to train and discuss scholarships (ex. Study Abroad)
o) Joined the National Scholarship Providers Association (NSPA)
p) Attended the NSPA national conference in October

3. University Marketing
   a) Continued to promote the Think Purple Campaign locally and regionally
   b) Developed a new 30 second promotional video featuring three current students
   c) Distributed video in movie theaters in Peoria, Bloomington, Springfield, Quincy, Quad Cities, Warrenville, Lincolnshire, and Lombard. It was aired from mid-December to mid-January to coincide with the Holiday break when prospective students would be viewing movies and again from mid-March to mid-April to coincide with spring breaks and with the anticipated release of the movie Hunger Games
   d) Video also aired on Quincy television stations, the Gatehouse Media website and during television coverage of the Summit League Conference Basketball Tournament
   e) Various topics for marketing and promotion appeared in papers in Macomb, Peoria, Quincy, Springfield, Quad Cities, and the Chicago Sun Times and the Chicago Daily Herald
   f) Billboard campaign featuring various topics in the Macomb region, Quad Cities, Springfield, Bloomington, Peoria, Chicago, and along interstates 80 and 88
   g) Banners and flags on Macomb and university streets and in local businesses
   h) Other promotional material such as clings and table tents provided to local businesses and on campus
   i) Advertising during the month of December in Woodfield Mall in Schaumburg and during the fall and spring in the North Riverside Park Mall.
   j) Developed the Holiday Greeting video featuring the University Singers under the direction of Dr. James Stegall and President Jack Thomas
   k) Developed two Think Purple stamps to promote Western world-wide
   l) Marketed Western in the Quad Cities airport
   m) With funding from the Western Illinois University Foundation, continued to offer purple shirts and polos to businesses for their employees to wear during selected Think Purple weekends throughout the year

4. University Relations
   a) Managed Crisis Communication:
      • Coordinated responses, with the city of Macomb, surrounding the aftermath of the 2011 Wheeler Street Block Party, including answering and monitoring questions/statements on Facebook, as well as e-mails and phone calls.
      • Numerous media interviews were conducted with Darcie Shinberger, Bob Fitzgerald and Al Goldfarb, which were coordinated through UR.
b) Supported WIU Marketing Initiatives including Think Purple:
- Darcie Shinberger, working with the VPAPS Brad Bainter and assistant Teresa Little, coordinated the University’s marketing efforts, including licensing and trademark agreements/approvals and logo approvals, as well as ad, billboard and other advertising placement throughout the state.
- UR Public Information Coordinator, Teresa Koltzenburg, in cooperation with Shinberger and student videographer, Daniel Kruzel, concepted, produced, and edited Western’s new 30-second Think Purple commercial for television, web and theatre placements, and concepted, produced and edited Western’s 2011 holiday greetings message for alumni, friends/donors, and the general public.

c) Improved Publications Initiatives:
- Re-designed viewbooks and other publications to further meet the needs of prospective students.
- All publications produced by UR (handbook, viewbooks, catalogs, etc.) are prepared by UR staff as accessible PDF documents for posting on the WIU website.
- Offering Campus Connection only as an e-newsletter (and PDF on the web), results in annual savings of over $4,000.
- 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

d) Continued Social Media Initiatives for Marketing, Recruiting and Promotion of WIU:
- Facebook, twitter, Flicker, and YouTube accounts are under the direction of Public Information Coordinator, Teresa Koltzenburg:
  - The Facebook page is used not only to promote the institution but also serves as a major/main communication conduit for students, prospective students, faculty, staff, alumni and parents.
  - As of March 1, 2012, WIU’s Facebook account has 15,564 likes, a 70% increase from 3/11.
  - Numerous videos were concepted, produced, and edited to promote a variety of WIU programs/initiatives (Big Pink Volleyball, Homecoming, FirstTee, Agriculture/Sustainability, and Mathematics).
- Webmaster Jessica Lambert designed and developed a University Marketing website.
  - Redesigned Annual Fund website and created numerous landing pages to coordinate with QR codes.
  - Designed and developed a Matching Gifts website, an online Scholarship Disbursement Form, and led and/or assisted with numerous web initiatives for the University.
e) Promoted WIU Programs, Activities, Accomplishments:
- Participated in national media networks through third party services to promote Western’s programs and faculty.
  - WIU employee finds Lincoln signature – 2,660 hits
  - emergency management program preps professionals – 3,439 hits
  - terrorism expert, Dean Alexander – 2,078 hits
  - severe weather expert, Jack Rozdilsky – 2,188 hits
- Working with local/regional/national media, UR staff coordinated interviews in which Western faculty and staff served as expert sources for such stories as green initiatives, transgender acceptance, birth control and the federal government, severe weather, terrorism and assassinations, and more.

f) Supported University Admissions:
- Continued to create 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.
- Public Information Specialist Jodi Pospeschil assisted Admissions with a media campaign to promote the Centennial Honors and Western Commitment Scholarships.
- Continued design projects and promotions for the University's Think Purple marketing campaign (lead designer – Jessica Lambert).
- Produced undergraduate viewbooks for the Macomb and Quad Cities campuses (Lambert & Bordowitz).
- Designed advertising materials (print ads, billboards, banners, etc.); Summer Session 2011 and 2012 promotional ads, posters, etc., as well as releases/promotions.

g) Continued University-Community Outreach Efforts:
- Public Information Specialist Jodi Pospeschil serves as the University representative for the American Cancer Society Walk and Alzheimer’s Walk, and also serves as liaison between the University and community for the annual Balloon Rally which is held on WIU’s campus.
- Public Information Coordinator Teresa Koltzenburg served as an instructor for HR training sessions about Facebook/social media, served as a social media panelist/expert for a "Social Media and Stalking” session held by the WIU Interpersonal Violence Prevention Initiative, and assisted the Illinois Council on Continuing Education with its web/social media efforts.
- UR Director Darcie Shinberger continues to work with local officials to promote WIU and Macomb, and in some instances, assists local city department with crisis communication efforts.

5. Visual Production Center
   a) Aggressively increased marketing and outreach by offering new products and services:
• Marketed WIU wall clings, stickers, window clings, and buttons.
• Took fraternity/sorority/honors society posed portraits and composites.
• Provided parents of student-athletes with e-mails providing links to game day action photos and individual posed photographs.
• Provided theatre and music students’ portfolio photographs.
• Alice Knapp supervised and completed an archives project of digital photos taken by VPC from FY’00-07 to further refine and enhance WIU’s photo archival database/library.

b) Provided quality photographs and large format projects at affordable prices.
• During FY2012 (July 1, 2011 to March 1, 2012) the Visual Production Center has produced 1,747 jobs (an increase of 69 from FY’11).

c) Continued to Improve Customer Service Initiatives.
• Lightbox, VPC’s online photo viewing website, which to date (March 1, 2012) has 188,964 photos uploaded.
• WIU Photographer II, George Hartmann, has promoted VPC’s services to community organizations (e.g. MHS), which has resulted in increased sales, and provided greater visibility at community events to further promote WIU.

d) Continued to promote WIU in the large format arena.
• Brian Kreps and Neil Wiarda have completed several large projects which have brought not only increased awareness and recognition for the University, but also to VPC.
  — Stand-up banners for Admissions
  — Hanson Field turf design
  — Banners for Hanson Field
  — Rock Hanson Display (Hall of Fame Room)
  — Union Kiosk display
  — Bookstore window clings
  — WIU banners and wall clings for off-campus businesses such as The Sports Corner, Wal-Mart and Buffalo Wild Wings.

e) Continued University-Community Outreach Efforts
• Larry Dean has worked with photography classes re: photography of art work, and has served as a mentor to two art students
• George Hartmann worked with local school districts to provide high quality photography/large format projects to promote programs, etc.
C. Describe how the division used any of the following categories of funds to enhance accomplishments and productivity:

1. Western Illinois University Foundation funds
   a) Alumni events
   b) President’s entertainment initiative
   c) Marketing efforts
   d) Scholarships
   e) Summer stipends for faculty
   f) “Think Purple” Campaign
   g) Campus beautification
   h) Memorial tree grove

2. Funds available due to vacant positions or dollars saved through hiring of new personnel at whatever level those funds reside.
   a) Jessica Lambert, Web Support Specialist for UR/VPAPS, was audited to Webmaster in Oct. 2011.
   b) Alison McGaughey, Public Information Specialist, resigned in October 2011.
   c) Jodi Pospeschil was hired as a Public Information Specialist in November 2011.
   d) Leslie Apel, VPC clerk, resigned in January 2012 (the position is currently being held).

3. Grants, contracts or local funds

4. Internal Reallocations: For reallocations over $20,000, identify the amount, area that was reallocated from, and the priority that funds supported.

5. Other fund sources
II. **Budget Enhancement Outcomes for FY12**

For each budget enhancement received in FY12—temporary or permanent—(i.e., 1% give back, end of year money) complete an accountability report form. Be specific about approved productivity measures.

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**Western Illinois University**

*Accountability Report for Program Support – FY12*

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.*

*Vice President spent $9,000 to date on travel & donor cultivation/stewardship and $14,600 was spent on Presidential Entertainment Initiative to date, including football tents, basketball buffet and scholarship banquets.*

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

<table>
<thead>
<tr>
<th>Personnel Services</th>
<th>Enhancement</th>
<th>Department/Unit Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds – Travel and Entertainment expenses</td>
<td>$23,600</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$23,600</td>
<td></td>
</tr>
</tbody>
</table>

**Contact Person If Questions:**

*Brad Bainter*  
*Name*  
*(309) 298-1808*  
*Phone Number*
Western Illinois University
Accountability Report for Program Support – FY12

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).

<table>
<thead>
<tr>
<th>Capital Campaign general</th>
<th>$26,300</th>
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<tbody>
<tr>
<td>Webinars</td>
<td>$625</td>
</tr>
<tr>
<td>Planned Giving Manager, Planned Giving Today &amp; GiftCalcs Plus</td>
<td>$1,335</td>
</tr>
<tr>
<td>Advisor Newsletters</td>
<td>$1,090</td>
</tr>
<tr>
<td>Prospect PRO</td>
<td>$2,595</td>
</tr>
<tr>
<td>Blackbaud</td>
<td>$5,500</td>
</tr>
<tr>
<td>Wealth Engine</td>
<td>$2,750</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
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<td>Equipment and Instructional Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
<td></td>
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<tr>
<td>Contractual Services</td>
<td>$40,195</td>
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<tr>
<td>Other Operating Funds</td>
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<td></td>
</tr>
<tr>
<td>Total</td>
<td>$40,195</td>
<td></td>
</tr>
</tbody>
</table>

Contact Person If Questions: Brad Bainter (309) 298-1808
Name Phone Number
Western Illinois University
Accountability Report for Program Support – FY12

I. Unit submitting report: University Scholarship Activities

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

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

See Attachment A for details regarding scholarships awarded in order to assist 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.

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

<table>
<thead>
<tr>
<th></th>
<th>Enhancement</th>
<th>Department/Unit Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td>$525,000</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$525,000</td>
<td></td>
</tr>
</tbody>
</table>

Contact Person If Questions: Terri Hare
Name
Phone Number 298-2001
Western Illinois University
Accountability Report for Program Support – FY12

I. Unit submitting report: University Marketing

II. Short title of the initiative receiving funding.

The following initiatives were accomplished with FY12 funding for marketing: $142,089.83 was expended for Chicago-area marketing with $12,138 spent on showing our 30 second promotional video in movie theaters, $99,447 spent on billboards around the Chicago area, $17,324.83 spent on promotion and marketing materials in malls, and $13,180 spent on print media marketing. $131,617.70 was spent on downstate advertising with $24,466 spent on showing our 30 second promotional video in movie theaters, $65,892.91 spent on billboards, $3,655.94 spent on banners and flags in the Macomb area, $16,320 spent on television and web advertising, $21,285.85 spent on print advertising. Marketing was augmented by approximately $10,000 from the WIU Foundation for the Think Purple shirts in Macomb.

III. Describe the specific productivity measures.

We continue to benefit from advice from Brigandi + Associates for our marketing program and very much appreciate their support. Our goal has been to increase 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 efforts to make Macomb and the Macomb region Western territory. The banners, flags, and clings, along with the shirts provided to local businesses, are a part of the local Think Purple campaign to get everyone talking and thinking Western, including guests during their visits to Macomb. Other efforts such as the billboards, movie theater promotions, and mall advertising have different landing pages to that we can see what kind of reaction we are getting from different marketing ideas.

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

<table>
<thead>
<tr>
<th></th>
<th>Enhancement</th>
<th>Department/Unit Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment and Instructional Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractual Services</td>
<td>$275,707.53</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$285,707.53</td>
<td></td>
</tr>
</tbody>
</table>

Contact Person If Questions: Brad Bainter
Name: Brad Bainter
Phone Number: 309-298-1808
## III. Major Objectives and Productivity Measures for FY13

1. Foundation and Development:
   a) Raise at least $8M in support of the Set the Standard: Higher Values in Higher Education Campaign to finish 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:
      - Identify final tier of fundraising prospects to suggest to Development Officers for addition to their portfolios for the last stretch of the campaign
      - Compile Net Worth for the Top Prospects in Development Officer portfolios
      - Add prior research results to new research contact screen in MVS

   f) Annual Fund and Phonathon:
      - Continue efforts in establishing a culture of philanthropy among undergraduate students by leveraging students participating in direct mail efforts.
      - Launch “Giving Circles” program among young alumni to leverage existing social networks and increased Annual Fund participation.
      - Increase Young Alumni participation in the Annual Fund from less than 5% to 10%.
      - Reconvene Automated Phonathon Records System Design Team to incorporate Parent and Family records, eliminating the need for greenbar paper, and streamlining Parent & Family Association fundraising efforts.
      - Achieve $400K in Phonathon pledges and $2M in overall Annual Fund pledges.
      - Achieve Annual Fund fulfillment rate of 85% or greater in FY13.
g) Donor Relations:
- Work with college and unit Development Officers to develop individual stewardship plans for major donors.
- Assist Tim Hallinan in implementing a Student Philanthropy Program.
- Work with Terri Hare to develop a communications vehicle with scholarship donors, ideally personalizing with scholarship recipient information.
- Continue to coordinate with Holly to bring all planned gift and scholarship accounts into compliance and under-used accounts into full utilization.
- Revise Foundation website and implement a separate campaign site featuring donor highlights, lead gifts, and impact stories.
- Expand Foundation Year in Review to include Donor Recognition Societies and donor lists; make available online.

h) Special Events:
- Three home football tents
- Hall of Fame banquet
- Scholarship banquet
- Founders’ Day
- Major Donor banquet
- Think Purple! Events

2. Scholarship Office:
   a) Continue to restructure and revise all written and web-based materials to promote and educate students about scholarship opportunities. Short term
   b) Assess how Foundation scholarship accounts can complement the new Western Commitment award while obeying the legal obligations set forth by the donors. Short term
   c) Continue to search for funding resources for competitive, academic scholarships. The Scholarship Office appropriated dollars are expected to be absorbed into the new Western Commitment award for new freshmen. Ongoing.
   d) Continue to enhance the Scholarship website and other electronic resources to reduce paper, increase awareness, and create a more efficient scholarship process for all involved. Short term.

3. University Marketing:
   a) Continue to increase WIU’s visual presence in Macomb and west-central Illinois
   b) Continue efforts to increase WIU’s visual presence throughout the state and especially in our major markets
   c) Begin efforts on campus to increase pride in the university and its history
   d) Develop a new 30-60 marketing video for television and theaters
   e) Further promote Think Purple
4. University Relations:
   a) Continue its support of Think Purple and other marketing initiatives.
   b) Continue to enhance Western's reputation and recognition as a top comprehensive university
   c) Obtain national recognition for its programs, students, faculty and initiatives.
   d) Continue the use of social media to promote WIU.
   e) Further enhance and refine its publications program
   f) Continue its outstanding relationships with media outlets

5. Visual Production Center:
   a) Continue to provide outstanding customer service and provide new products to promote the institution.
   b) Continue to research and evaluate new methods to promote its varied services.
   c) Further develop and implement University marketing initiatives as outlined in the strategic plan.
   d) Research innovative methods to market services to students and parents, as well as to the general University and local communities.
   e) Overhaul photos for the new Riverfront Campus, as well as many of the University's images representing academics, etc., to represent the institution in a bold and unique fashion.
IV. Technology Goals and Objectives

1. Equip the WIU Phonathon with VoIP (Voice over Internet Protocol) to replace cell phone/landline usage by September 1, 2012.
2. Launch mobile Annual Fund presence.
3. Continued use of QR (Quick Response) codes / online student videos in direct mail and student philanthropy efforts.
4. Continue to work with University Relations and Online Students Services to implement an online registration system, calendar of events, and webpage for VPAPS/Foundation Office events.
5. The Scholarship website will move from its current format to the new CMS format as a total format overhaul. Success will be measured by number of hits and number of inquiries.
6. Continue to improve correspondence between the Scholarship Office and departments across campus with regard to annual scholarship account balances and student disbursement.
7. Continue to create and implement new scholarship/Foundation screens that will enable information to be more easily accessed.
8. Continue to work with AIMS to create new reports/queries/screen enhancements and processes to ensure accuracy of data.
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 FY13 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>$300,000</td>
<td>Continuous</td>
</tr>
<tr>
<td>1</td>
<td>Previously Committed Scholarship Enhancement Program</td>
<td>Scholarship Office</td>
<td>$467,850</td>
<td>Ongoing Commitments from previous awards</td>
</tr>
<tr>
<td>1</td>
<td>Scholarship Enhancement</td>
<td>Scholarship Office</td>
<td>$327,000</td>
<td>Ongoing commitments</td>
</tr>
<tr>
<td>1</td>
<td>Campaign Initiatives</td>
<td>Foundation and Development</td>
<td>$100,000</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>
I. Unit submitting request: Development Office

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 contacts 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 _ X ______ No

VII. Will the project be supplemented by other funds?

X Yes ______ No

WIU Foundation will supplement appropriated funding.

Contact Person If Questions: Brad Bainter Phone: 8-1808_
I. Unit submitting request: University Marketing

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.

Approximately $275,000 was expended from various sources during the FY12 academic year. It would be beneficial to have this slight increase in one fund and would allow the university to continue to expand and broaden its marketing campaign and its Think Purple campaign. Two new initiatives will be to expand the Think Purple campaign on campus to build pride with our faculty, staff, and students on campus and to hire a media buying firm to assist us with our efforts in the Chicago area. The firm will do extensive research that will tell us where we are not marketing but should be and where our competitors are marketing and how much they are spending. They will also assist us in buying and placing media.

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>$300,000</td>
</tr>
<tr>
<td>Other Operating Funds</td>
<td>___</td>
</tr>
<tr>
<td>Total</td>
<td>$300,000</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?

X ___ Yes  ____ No

Contact Person If Questions: Brad Bainter Phone: 8-1808
Western Illinois University
Budget Request Format
For Program Support FY12

I. Unit submitting request: University Scholarship Activities
   Priority Number 1

II. Provide a short title of the initiative proposed for incremental funding.
    Previously Committed Scholarship Enhancement Program

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.

    Proposed department funding will be level funding for personnel, equipment, and instructional materials. Proposed funding from appropriated dollars will be reduced due to funds reallocated to the Western Commitment Scholarship. The proposal does include funding to maintain the remaining balance of 4-year scholarships already committed prior to the Western Commitment and the sustainability of transfer, minority, book, and non-Western Commitment scholarships.

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

    By receiving funding for the sustainability of transfer, minority, book, and non-Western Commitment scholarships, the university will be supporting accessibility for students to attend WIU. Results may be measured by recruitment and retention rates.

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

   Personnel Services  A/P
   C/S
   Equipment and Instructional Materials
   Library Materials
   Contractual Services
   Other Operating Funds-Attachments B & C  $467,850
   Total  $467,850

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

    These are funds that have been committed to 4-year scholarship recipients as renewals for FY 13.

Contact Person If Questions:  Terri Hare  298-2001
Name  Phone
I. Unit submitting request: University Scholarship Activities  

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

Scholarship Enhancement  

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.  

Proposed department funding will be level funding for personnel, equipment, and instructional materials. Proposed funding from appropriated dollars will be reduced due to funds reallocated to the Western Commitment Scholarship. The proposal does include funding to maintain the remaining balance of 4-year scholarships already committed prior to the Western Commitment and the sustainability of transfer, minority, book, and non-Western Commitment scholarships.  

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

By receiving funding for the sustainability of transfer, minority, book, and non-Western Commitment scholarships, the university will be supporting accessibility for students to attend WIU. Results may be measured by recruitment and retention rates.  

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

Personnel Services A/P  
Equipment and Instructional Materials  
Library Materials  
Contractual Services  
Other Operating Funds-Attachment C $327,000  
Total-Attachment D $327,000  

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  

Appropriated dollars that are to be used to make new scholarship awards each academic year. This does not include the 4-year scholarships (Attachment C) already committed that will be phased out over the next three years. Foundation funding is not included, as the budget for scholarships is driven by donations and annual interest earnings.  

Contact Person If Questions: Terri Hare 298-2001  
Name Phone
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, 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. 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. Increase in last year's request to assist in expanding the Annual Fund efforts as we head into the last 18 months of our campaign.

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. 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 __________
  - C/S __________
  - NTT __________
  - T/T __________

- Equipment and Instructional Materials __________

- Library Materials __________

- Contractual Services __________

- Other Operating Funds $100,000

- Total __________

- $100,000

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?

- Yes ___ X ___ No

Contact Person If Questions: Brad Bainter Phone: 8-1808
Western Illinois University
Budget Request Format
For Program Support FY12

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.

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
C/S
NTT
T/T

Equipment and Instructional Materials

Library Materials

Contractual Services

Other Operating Funds

Total

10,000

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 FY13 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>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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: 818-08
### ATTACHMENT A

#### Spending Allocation FY 12 Year End

<table>
<thead>
<tr>
<th>University Scholarship Activities</th>
<th>3/15/2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amount</strong></td>
<td><strong># Recipients</strong></td>
</tr>
<tr>
<td>Amount to Date</td>
<td></td>
</tr>
</tbody>
</table>

#### Foundation funding

- WIU Foundation Scholarships excluding Trustees: $858,781.98, 1,708 recipients (See Trustee also)
- Outside Scholarships through WIU Foundation: $998,808.00, 1,272 recipients
- **TOTAL**: $1,857,589.98, 2,980 recipients

#### Financial Aid Office funding

- PMGAP/Western Educational Opportunity Grants: $48,500.00, 26 recipients
- Presidential/Foundation/DuSable Scholarships: $114,000.00, 86 recipients
- **TOTAL**: $162,500.00, 112 recipients

#### Student Services funding

- Residential Scholar Initiative Program: $258,560.00, 55 recipients (See Trustee also)
- Academic Promise: $15,000.00, 15 recipients
- Minority Access for Achievement: $15,000.00, 16 recipients
- **TOTAL**: $288,560.00, 86 recipients

#### Appropriated funding/President Thomas

- Legacy Scholarship: $253,750.00, 221 recipients
- Minority Achievement Books: $44,190.93, 164 recipients
- Special Assistant Books: $70,085.83, 165 recipients
- Retention Assistance: $65,955.00, 99 recipients
- Al Goldfarb Scholarship: $21,000.00, 21 recipients
- Summer 2012: $40,000.00, Yet to be awarded
- Retention Assistance-spring registration: $30,018.24, Yet to be awarded
- **TOTAL**: $525,000.00, 670 recipients

#### Trustee Scholarship funding

- Tuition Waiver: $298,751.81, 31 recipients
- Residential Scholar Initiative Program: $125,206.00, 26 recipients
- Foundation scholarships for Room and Fees*: $148,430.00, 31 recipients
- **TOTAL**: $572,387.81, 31 recipients

**TOTAL AID AWARDED**: $3,406,037.79, 3879 recipients
## Institutional Funding—Scholarship Office
### 2012-13 Proposal
12/13/2011

<table>
<thead>
<tr>
<th>Scholarship</th>
<th>Type</th>
<th>Amount</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>President's Scholarship</td>
<td>Full ride</td>
<td>T/F/R/B</td>
<td>Tuition Waiver/Room Award</td>
</tr>
<tr>
<td>Underrepresented</td>
<td>PMGAP</td>
<td>8 @ $4,000/yr</td>
<td>$32,000.00 Graduate scholarship</td>
</tr>
<tr>
<td>Non-Western Commitn</td>
<td>Freshman</td>
<td>TBD</td>
<td>$50,000.00 Not limited to Underrepresented</td>
</tr>
<tr>
<td>Transfer Students</td>
<td>Transfer</td>
<td>TBD</td>
<td>$75,000.00 Not limited to Underrepresented</td>
</tr>
<tr>
<td>Retention</td>
<td>Encumbrance</td>
<td>$0</td>
<td>$0.00 Financial Aid takes control</td>
</tr>
<tr>
<td>Books</td>
<td>MAP</td>
<td>125 @ $600/yr</td>
<td>$75,000.00 Renewable each semester with 3.2 GPA</td>
</tr>
<tr>
<td></td>
<td>Special</td>
<td>200 @ $300</td>
<td>$60,000.00 One-time assistance</td>
</tr>
<tr>
<td>Summer</td>
<td>Scholarship</td>
<td>$500 or $1,000</td>
<td>$30,000.00</td>
</tr>
<tr>
<td>TOTAL REQUESTING</td>
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<td></td>
<td>$332,000.00</td>
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</table>
## FY 13 Committed Dollars

<table>
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<tr>
<th>Scholarship</th>
<th>Appropriated 2012-13</th>
<th>Other $'s 2012-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presidents - Freshman</td>
<td>$144,000</td>
<td>$89,000 housing</td>
</tr>
<tr>
<td>Presidents - Transfer</td>
<td>$7,700</td>
<td>$10,125 housing</td>
</tr>
<tr>
<td>Presidents - Quad City</td>
<td>$3,625</td>
<td>-</td>
</tr>
<tr>
<td>WIU Foundation Honors - Freshman</td>
<td>$12,000</td>
<td>$12,000 Honors</td>
</tr>
<tr>
<td>WIU Foundation Honors - Transfer</td>
<td>$-</td>
<td>$2,000 Honors</td>
</tr>
<tr>
<td>WIU Foundation Scholars - Freshman</td>
<td>$21,000</td>
<td>-</td>
</tr>
<tr>
<td>Presidential Scholars</td>
<td>$42,000</td>
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<tr>
<td>Goldfarb Scholars - Freshman</td>
<td>Being phased out</td>
<td>$9,000</td>
</tr>
<tr>
<td>Goldfarb Scholars - Transfers</td>
<td>Being phased out</td>
<td>$4,000</td>
</tr>
<tr>
<td>DuSable</td>
<td>$2,000</td>
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<tr>
<td>DuSable - Transfers</td>
<td>$1,000</td>
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</tr>
<tr>
<td>Western Legacy - Freshman</td>
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<td></td>
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<td>Western Legacy - Transfers</td>
<td>$2,000</td>
<td></td>
</tr>
<tr>
<td>Legacy Scholarship - Freshman</td>
<td>$-</td>
<td></td>
</tr>
<tr>
<td>Legacy Scholarship - Transfers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention Assistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minority Achievement Program (MAP) Books</td>
<td>$33,400</td>
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<td>Special Book Awards</td>
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<td>Summer WEOG</td>
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<td>PMGAP</td>
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<tr>
<td>Western Opportunity Grant</td>
<td></td>
<td></td>
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<tr>
<td>Academic Promise - Freshman</td>
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<td></td>
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<tr>
<td>Academic Promise - Transfer</td>
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<td>Minority Access Retention - Freshman</td>
<td>Being phased out</td>
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<td><strong>Totals</strong></td>
<td><strong>$354,725</strong></td>
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### Attachment D

#### FY 12 Funding

<table>
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<th>Amount</th>
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<tr>
<td>Tuition Waivers (President's Award)</td>
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<tr>
<td></td>
<td>$1,083,020.00</td>
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#### Budget Request FY 13

| Redirect from Scholarship Office to Western Commitment | $288,170.00* |

*This figure will continue to increase as 4-year scholarship recipients graduate over the next 3 years.
The Foundation transactions were mostly consistent with FY11 figures, which were up substantially from prior years 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 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

<table>
<thead>
<tr>
<th></th>
<th>FY12 as of 3/2/12</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>
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<tbody>
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<td>1,672</td>
<td>1,688</td>
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<td>Checks Written</td>
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<td>710</td>
<td>678</td>
<td>730</td>
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<td>457</td>
<td>460</td>
<td>511</td>
<td>573</td>
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<td>Travel Vouchers</td>
<td>94</td>
<td>105</td>
<td>93</td>
<td>90</td>
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<td>Journal Entries</td>
<td>12,197</td>
<td>14,306</td>
<td>13,674</td>
<td>13,173</td>
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<tr>
<td>Credit card gifts</td>
<td>2,652</td>
<td>2,110</td>
<td>1,235</td>
<td>1,121</td>
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<tr>
<td>Other credit card transactions</td>
<td>652</td>
<td>469</td>
<td>954</td>
<td>1,770</td>
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<tr>
<td>New Accounts</td>
<td>48</td>
<td>78</td>
<td>62</td>
<td>76</td>
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<tr>
<td>Accounts on Record</td>
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<td>1,717</td>
<td>1,668</td>
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<td>IRS 1099’s issued</td>
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<td>57</td>
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<td>14,806</td>
<td>14,005</td>
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<tr>
<td>Pledge Payments</td>
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<td>8,202</td>
<td>9,100</td>
<td>10,161</td>
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<tr>
<td>Gift receipts mailed</td>
<td>10,366</td>
<td>10,577</td>
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<td>n/a</td>
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<tr>
<td>Gift receipt numbers issued</td>
<td>19,329</td>
<td>19,554</td>
<td>17,251</td>
<td>17,093</td>
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</table>
### Number of Gifts from New Donors

<table>
<thead>
<tr>
<th>Category</th>
<th>FY12 as of 3/2/12</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>
</tr>
</thead>
<tbody>
<tr>
<td># gifts from New donors - Phonathon/Annual Fund</td>
<td>2,285</td>
<td>3,663</td>
<td>4,866</td>
<td>4,533</td>
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<tr>
<td># gifts from New donors - Megathon</td>
<td>259</td>
<td>372</td>
<td>564</td>
<td>470</td>
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<tr>
<td># gifts from New donors - WQPT</td>
<td>1,018</td>
<td>2,778</td>
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<td># gifts from New donors - MISC</td>
<td>353</td>
<td>301</td>
<td>408</td>
<td>437</td>
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</table>

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

- Phonathon/Annual Fund: 58.37%
- Megathon: 26.00%
- WQPT: 9.02%
- Other: 6.62%
<table>
<thead>
<tr>
<th>Year</th>
<th>CAS</th>
<th>CBI</th>
<th>COOPS</th>
<th>COHAC</th>
<th>Library</th>
<th>Money</th>
<th>CMH</th>
<th>Student Services</th>
<th>QM</th>
<th>WQEP</th>
<th>Athletics</th>
<th>Alumni</th>
<th>BPI</th>
<th>Ratio</th>
<th>PEK</th>
<th>Other</th>
<th>Total</th>
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<tr>
<td>2012</td>
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<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>51,000</td>
</tr>
</tbody>
</table>

**Campaign Progress Report**

July 1, 2011 - June 30, 2012

**Set the Standard -**

Higher Values in Higher Education

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**Notes:**
- CAS: Curriculum and Student Affairs
- CBI: Campus Business Institute
- COOPS: Campus Operations
- COHAC: Campus Human Affairs Committee
- Library: Library Services
- Money: Financial Management
- CMH: Campus Marketing and Hospitality
- Student Services: Student Affairs
- QM: Quality Management
- WQEP: Wisconsin Quality Enhancement Project
- Athletics: Athletics and Recreation
- Alumni: Alumni Relations
- BPI: Business Planning and Information
- Ratio: Financial Ratio
- PEK: Physical Education and Kinesiology
- Other: Other Departments

---

**References:**

1. [University Report Website](http://example.com)
2. [Campus Fact Sheet](http://example.com/factsheet)
3. [Campus Strategic Plan](http://example.com/strategicplan)
4. [Campus Budget](http://example.com/budget)
5. [Campus Sustainability](http://example.com/sustainability)
6. [Campus Accreditation](http://example.com/accreditation)
<table>
<thead>
<tr>
<th></th>
<th># of Pledges</th>
<th>Total Pledge</th>
<th>Average Pledge</th>
<th>Pledges Paid</th>
<th>Cash</th>
<th>GIK</th>
<th>GIK Paid</th>
<th>Total Gifts*</th>
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</thead>
<tbody>
<tr>
<td>Arts and Sciences</td>
<td>462</td>
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<td>129</td>
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<td>250</td>
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<td>Quad Cities</td>
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<td>1,245</td>
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<td>104</td>
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<td>1,104,796</td>
<td>191,374</td>
<td>550</td>
<td>1,570,264</td>
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</table>

Above Pledge Totals Include:
- Western Athletic Club: 224,367
- Performing Arts Society: 51,900
- Library Atrium Society: 8,080

Above Receipt Totals Include:
- Western Athletic Club: 81,304
- Performing Arts Society: 30,941
- Library Atrium Society: 3,750

Total Annual Fund: $1,956,273.31

**PURPOSE:** Record of FY12 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 - Gifts, Pledges Paid, GIK’s in Kind and GIK Pledges Paid
GIK’s do not include Service or noncharitable Gifts in Kind
Pledge, Gifts and GIK’s (does not include pledges or GIK pledges Paid to avoid double counting)
Printed on: 4/4/2012
## Phonathon Report
### July 1, 2011 - June 30, 2012

<table>
<thead>
<tr>
<th>Category</th>
<th># of Pledges</th>
<th>Total Pledge</th>
<th>Average Pledge</th>
<th>Pledges Paid</th>
<th>Cash</th>
<th>GIK Paid</th>
<th>GIK Paid Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Sciences</td>
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<td>30,220</td>
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<td><strong>4,346</strong></td>
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*Above Pledge Totals Include:*
- Western Athletic Club: 5,188
- Performing Arts Society: 200
- Library Atrium Society: 1,660

*Above Receipt Totals Include:*
- Western Athletic Club: 3,420
- Performing Arts Society: 0
- Library Atrium Society: 1,200

Total Phonathon: $207,273.44

**PURPOSE:** Record of FY12 Phonathon to report Unit totals

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

**NOTES:**
- 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:* 4/4/2012