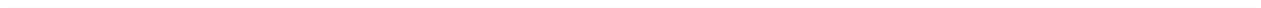


# **FY19 Planning and Accomplishments**

## **Office of the Vice President for Advancement and Public Services**



**FY19 Planning and Accomplishment Guidelines**  
**Western Illinois University**  
Public Presentations April 15-16, 2019

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

*Note:* The current edition of *Higher Values in Higher Education 2012-2022* and the *2017 Strategic Plan Supplement* for your answers are available at [http://www.wiu.edu/university\\_planning/strategicplan.php](http://www.wiu.edu/university_planning/strategicplan.php)

**Current Year**  
**Fiscal Year 2019**

**I. Accomplishments and Productivity for FY19**

The mission of the Division of Advancement and Public Services at Western Illinois University is to share information about the University, its students, faculty, alumni and programs; and to articulate the institution's needs in the form of budgetary, philanthropic and programmatic support. Advancement activities are conducted primarily through the efforts of the WIU Foundation and Development Office, University Marketing, University Relations, the Visual Production Center, and University Television.

The mission of the Western Illinois University Foundation is to inspire and motivate alumni, friends, faculty, and staff to make an impact on the University through financial support. We help prospective donors envision the direct, meaningful differences they can make in the lives of students and the University community. The Foundation will assist the University in attracting and retaining well qualified students by continuing Western's tradition of providing an accessible and affordable education. The Foundation will support the enhancement and maintenance of University facilities as technology advances and student and community expectations change. The Foundation will provide support for faculty scholarly activities and professional development opportunities for students and staff to support the University's mission. The Foundation will enhance donor relationships to preserve loyalty and generosity from its benefactors.

A. Give a brief review of the division's goals and objectives for FY19.

**a. Foundation and Development/ Development Leadership**

- i. As always, we will strive to increase levels of private support to continue to advance the mission of the University.
  - ii. We have filled several vacancies and ongoing training must continue for our new staff members as many were hired without experience in higher education.
  - iii. Continue to assess needs for every area on campus as we begin the process of preparing for our next comprehensive campaign for Western.
  - iv. Start the process of interviewing consultants for our next campaign
  - v. Prepare to hire new positions needed for a comprehensive campaign. Two new development officers and an assistant director of the annual fund are essential and a person devoted to full-time development work in athletics is also needed.
  - vi. Work closely with the college/department development officers and the deans/directors for those units, to determine priority areas to focus fundraising efforts and agree upon at the start of the fiscal year. Hold quarterly meetings to review and discuss priorities and progress toward goals.
  - vii. Facilitate increase in fundraising goals for development officers by 5-7% in order to achieve overall University goal of \$8 million.
  - viii. In addition to a prospect management metrics system which tracks contacts with prospects and donors, the development officers will complete proposal tracking reports to allow for the monitoring of progress with pre-identified major gift prospects including their top 20 prospects and their next 40 major gift prospects.
  - ix. Development officers will meet bi-monthly with the Executive Director of Development to report
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progress on annual plan as well as receive assistance in preparing proposals and making donor calls. All development officers meet monthly in a Prospect Management Meeting to discuss new prospects and share information about their respective efforts. New prospects are identified and assigned at these meetings as well as progress reports given on Discovery Prospects.

- x. Implement new strategies to identify prospective donors using wealth index screening as well as review of past donors with gifts exceeding predetermined thresholds with the assistance of the Director of Prospect Research.
  - xi. **Accounting and Gift Processing**
    - 1. The Foundation Accounting division completed a full year with the same staff beginning to end. Given the relatively new staff, the main goal and objective was training on both internal policies and procedures, as well as external laws, rules and regulations that impact the gift processing and accounting functions of a 501(c)(3) organization. Foundation Accounting continued to focus on enhancing internal policies, procedures, training materials and process methodologies of practice, as carried over from previous years.
  - xii. **Annual Giving**
    - 1. Expand University-wide Crowd Funding initiative.
    - 2. Plan and implement fourth annual Western Challenge in April 2019
    - 3. Implement Peer-to-Peer Alumni Engagement program at WIU-QC.
    - 4. Continue repurposing of Phonathon to include stewardship and donor relations activities in addition to solicitation calls.
    - 5. Continued Crowdfunding/Mobile Giving/Event-based fundraising programs among all stakeholders to leverage increased annual fund participation and data collection.
  - xiii. **Donor Relations/Special Events**
    - 1. Create comprehensive stewardship plan to ensure donors at all levels receive 7-10 contacts annually from the Foundation/University.
    - 2. Implement stewardship metrics to track the Foundations' ability to inspire, develop and retain key stakeholders who can help Western achieve its mission.
    - 3. Continue to call donors and thank them for gifts of \$2,000 or more.
    - 4. Continue to create more unique ways to steward donors.
    - 5. Continue to direct and manage traditional university events, including but not limited to Founders' Day, Donor Appreciation Banquet, groundbreakings, and facility dedications.
  - xiv. **Prospect Research and Advancement Services**
    - 1. Design a portfolio summary report to help Development Officers manage prospects flowing into and out of management.
    - 2. Utilize Pentaho reports to continue to create new opportunities for frontline fundraisers to identify potential new prospects and prioritize existing prospects.
    - 3. Modify the existing DataDesk query to apply to individual colleges, departments, or projects as a way to identify new potential donors.
    - 4. Utilize GrantStation to discover new opportunities for grant funding of various projects at the University. Facilitate the process of applying for these funds to ensure applications are compelling and complete for the best chance of being awarded.
    - 5. Continue to research matching gift companies and update the employee records to increase the amount of funds secured through matching gifts.
    - 6. Maintain and improve existing scheduled and ad hoc Pentaho reports to ensure data is being distributed in an efficient, useful manner for all users.
    - 7. Continue to review the checklist of monthly cleanup items with Foundation Accounting and other support staff to streamline division of responsibilities.
    - 8. Continue to work with the Foundation/Alumni/AIMS team to prioritize and complete project items related to the MVS/WIUP system.
    - 9. Continue to work with the UTech Business Intelligence team in creating the Pentaho Data Warehouse for Foundation/Alumni data.
  - b. **University Marketing**
    - i. Continue to increase WIU's visual presence in Macomb and west-central Illinois, the State, and targeted regions of the world.
    - ii. Identify and close gaps in brand touchpoints within the customer journey, with the primary goal to increase enrollment.
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- iii. Revitalize the WIU brand and continue efforts to increase pride and confidence for WIU both internally, within the community and the region, for recruitment, retention and lifetime commitment to WIU.

**c. University Relations (UR)**

- i. University Relations will continue its support of Foundation/giving initiatives.
- ii. University Relations will continue to enhance Western's reputation and recognition as a top comprehensive university.
- iii. University Relations will obtain national recognition for WIU's programs, students, faculty and initiatives.
- iv. Continue use of social media to promote WIU and its faculty, programs and services globally; to further enhance Western's recognition and reputation as a quality institution to attract and retain students, faculty and staff; and to engage members of the Western community with an open platform upon which they can provide feedback to the institution and ask questions.
- v. University Relations staff will further enhance its publications program, and will continue to produce higher quality/innovative publications, which supports the Strategic Plan Goals 1 & 2 of attracting a diverse student body and faculty to Western.
- vi. University Relations staff will continue its outstanding relationships with media outlets to promote services, events and programs.
- vii. University Relations and Visual Production Center staff will work to further develop and implement University marketing initiatives as outlined in the strategic plan.

**d. Visual Production Center (VPC)**

- i. The Visual Production Center will continue to provide outstanding customer service and provide new products to promote the institution. In addition, VPC will continue its relationship with University Archives to better determine the best method possible for archiving WIU's photographic history.
- ii. The Visual Production Center will research innovative methods to market services to students and parents, as well as to the general University and local communities.
- iii. University Relations and Visual Production Center staff will work to further develop and implement University marketing initiatives as outlined in the strategic plan.

**e. University Television (UTV)**

- i. University Television's primary mission is to support Western's commitment to higher education through television and media services.
- ii. UTV collaborates with WIU marketing and public relations initiatives.
- iii. UTV's secondary mission is to advance television and media services to other educational and private groups for community outreach.
- iv. Provide broadcasting students with practical experience in the broadcasting field.

- B. List the most important divisional accomplishments for FY19 and document how these accomplishments support the goals and objectives of the University, including specific *Strategic Plan 2012-2016* and *2017 Strategic Plan Supplement* accomplishments.

**a. Foundation and Development**

- i. As of February 28, 2018, the endowment fund has a value of \$58.7 million, up over \$5 million at the time of this report in FY18. Total foundation assets are now valued at just over \$68.1 million. Our planned giving inventory, which represents planned gifts documented, is now at \$38.1 million.
  - ii. Contributions and pledges now total over \$5.3 million, which is nearly 70% toward our goal of \$8 million for FY19.
  - iii. Additional new scholarships to assist in the recruitment of freshmen and transfer have been added to our existing foundation scholarship program this year.
  - iv. Our Day of Giving, which raised nearly \$154,000 last year, is scheduled for April 24 in conjunction with our Purple & Gold Day, which celebrates the founding of Western in 1899.
  - v. Significant gifts through March 31 include:
    - 1. Major Gifts and Planned Gifts Received:
      - a. Ernie Codilis - \$50,000
      - b. John F. Blauvelt Geography Fund - \$232,000
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- c. Anna Fagerlie - \$100,000
  - d. George Grice - \$39,000
  - e. Molly Homes - \$28,000
  - f. George Hussey - \$20,000
  - g. Dale & Lynn Johnson - \$27,000
  - h. Joyce Juhl - \$23,845
  - i. Stephen Julstrom - \$21,000
  - j. Michael Kelly - \$20,000
  - k. Kay Kennedy Estate - \$35,441
  - l. Mary Olive Woods Trust - \$29,426
  - m. Jody McCamey - \$33,000
  - n. Velma McCamey - \$26,000
  - o. William Noble Estate - \$119,696
  - p. Steve Mills - \$25,000
  - q. Ruth Richert - \$25,300
  - r. Margaret Wong - \$34,000
2. Planned Gifts Made:
    - a. Jerry Ernst- \$300,000
    - b. Cliff & Susan Haka- \$517,400
  3. Corporate and Foundation Funding:
    - a. Marguerite Casey Foundation - \$20,000
    - b. Roy J. Carver Charitable Trust - \$494,917
    - c. Doris & Victor Day Foundation - \$45,000
    - d. Hubble-Waterman Foundation - \$50,000
    - e. Hunt and Diane Harris Foundation - \$50,000
    - f. John Deere Classic - \$64,603
    - g. Lowell N. Johnson Foundation - \$67,500
    - h. Quad Cities Community Foundation - \$256,750
    - i. Sodexo Inc. and Affiliates - \$339,686
    - j. Summit League - \$250,000
    - k. Tracy Family Foundation - \$76,000
    - l. Fellheimer Trust of Wesley United Methodist Church - \$45,313
  4. Ways of Giving:
    - a. Nearly 50,000 planned giving brochures will again be mailed to our alumni over the age of 55 by fiscal year end.
    - b. Efforts continue to be made to make online giving easier for our donors.
    - c. Information is provided to prospective donors who wish to electronically transfer appreciated securities, establish automated electronic transfers from bank accounts, and establish payroll deductions.
    - d. Our planned giving website provides up-to-date information about estate planning and changes in tax laws that might affect charitable giving. This includes information about directing required contributions that must be taken from retirement accounts to the Western Illinois University Foundation. This is becoming an increasingly popular way to donate to Western from our alumni who are 70 ½ years of age or older.
    - e. We continue to improve our crowdfunding platforms and our text to give efforts.
- vi. **Development Leadership**
1. Levels of private support continue in all colleges/departments though some levels of hesitancy exist amid layoffs and program changes.
  2. Members of the development staff have been actively visiting prospective donors throughout our region and the state of Illinois, as well as Alabama, Arizona, California, Colorado, Florida, Indiana, Iowa, Georgia, Kentucky, Minnesota, Missouri, New York, Oklahoma, Tennessee, Texas, Virginia, Wisconsin and Washington, D.C.
  3. Significant support from the colleges/departments include:
    - a. College of Arts and Sciences
      - i. \$517,400 increase in planned gift to benefit math & history
      - ii. \$232,000 gift for Doppler Radar purchase
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- iii. \$50,000 planned gift
  - iv. \$27,635 for scholarship support and classroom renovation
  - v. \$25,000 for endowed Biology scholarship
  - vi. \$21,606 for physics lab updates
  - b. College of Business and Technology/Corporate Engagement
    - i. \$43,275 corporate support from multiple sources for ag programs
    - ii. \$17,000 for Ag Bucket Project
  - c. College of Education and Human Services
    - i. \$101,000 in gifts for Great River Teacher Corp
    - ii. \$28,000 gift to support community policing scholarship
  - d. College of Fine Arts and Communication
    - i. \$50,000 endowment for senior art award
  - e. Athletics
    - i. \$250,000 gift for endowed scholarships
  - f. Quad Cities
    - i. \$494,917 for School of Engineering capital improvements
    - ii. \$250,000 for WQPT capital needs
    - iii. \$60,000 for endowed scholarships
    - iv. \$50,000 to support high school dual enrolled ag classes
  - g. Student Services
    - i. \$28,000 for LGBTQA+ endowed scholarship
    - ii. \$25,000 matching challenge for Western Challenge
    - iii. \$86,100 for both phases of the Alumni Plaza fundraising project with 581 donors.
4. Gifts secured in FY18 as well as FY19 have led to several new or renovated university facilities in FY19, including:
    - a. McCamey Criminalistics Lab
    - b. Horrabin Hall Education Classroom Technology Upgrades
    - c. Chown Golf Learning Center at Harry Mussatto Golf Course
    - d. Men's Soccer Locker Room Renovation
    - e. Physics Lab Renovation
    - f. Active Learning Classroom for Political Science and History
    - g. Renovated Nursing Labs
  5. Each of the four colleges and intercollegiate athletics started the year with a development officer in place with direct reporting lines to the Executive Director of Development. COFAC is currently in a search after the resignation of their development officer in January. Student Services is staffed by the Associate Vice President for Student Services and the Library is staffed by the Development Officer for COEHS. Consideration should be given for a full time development position to be added which could serve the Honors College, International Programs, Student Services, and the Library.
  6. While additional focus this year has been on specific prospects and the development and presentation of major gift proposals, a more directed Moves Management System will be put in place for the coming year to better track prospective donors and the development officers' efforts toward securing major gifts.
  7. With layoffs coming in the college units which impact staff who plan and stage events, additional time is being requested of the development officers as they are seen not only as fundraisers but also serve in public relations and other external functions. While the university development office has a position to assist with events, additional time expectations of the development officers to assist in these "other" duties will severely hamper their specific responsibilities for major gift fundraising. Some attention must be given to the areas being impacted by these layoffs and the duties previously performed by those whose positions have been eliminated.
  8. Members of the development staff attended and participated in the CASE District V Conference in Chicago.
  9. New staff members have attended CASE Newcomers or other CASE-specific conferences to enhance their professional development and enhance their skills as advancement officers.
  10. Performance metrics continue to be used to measure productivity and track personal calls for
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cultivation, solicitation, and stewardship. Each gift officer is also responsible for developing proposal timelines for solicitation of major gifts from specific prospects.

11. Mentoring opportunities have been encouraged with all development officers who attended CASE District V conference meeting with counterpart from other universities to discuss best practice techniques.

vii. **Accounting and Gift Processing**

1. The department was able to convert and complete the FY18 financial statements from GASB to FASB with no material audit findings.
2. The department accomplished calendar year-end IRS obligations in a timely manner.
3. We have also been able to cross-train new staff on the gift and pledge processing function, as well as the accounts payable function

viii. **Annual Giving**

1. Strategic Plan Goal 5 Action 3a: "Increasing the percent of Alumni giving to the University"
  - a. Implemented successful outbound text solicitation pilot campaign via Phonathon (Nov. 2018).
  - b. Expanded direct mail outreach among WIU-QC alumni to include Museum Studies, School of Engineering and comprehensive donor acquisition mailing.
  - c. Expanded crowdfunding effort among academic programs in 2018-19 from 3 to 10 projects.
  - d. Planning fourth Western Challenge event on 24-APR-19.
  - e. Increased online advocates for University Crowdfunding initiatives by 30% in 2018-19 (293 advocates).
  - f. Increased online donors via the GiveCampus platform by 15% in 2018-19 (1,385 donors).
2. Strategic Plan Goal 3 Action 5b: "Assist student organizations in the planning, implementation, and evaluation of cultural, social, educational and service programs."
  - a. Supported and provided guidance to three student groups to meet project revenue goals.
  - b. Working with Sigma Chi representative on launching FY19 Senior Gift Campaign.

ix. **Donor Relations & Special Events**

1. Stewardship
    - a. Maintained timely, personalized acknowledgement of Foundation gifts of \$500 and above. Individual letters from VP Bainter were sent to nearly 530 donors so far in FY19.
    - b. Drafted acknowledgement letters for President Thomas for major, special and presidential scholarship gifts.
    - c. Sent special greetings to more than 1,012 first-time donors so far in FY19.
    - d. Realized the Foundation Fellows codes on the database are not all accurate; working with AIMS to do a complete overhaul of our Foundation Fellows coding so it is accurate.
    - e. Notified donors with pending matching gifts the procedures necessary to capture that gift.
    - f. Generated monthly reports of memorial contributions to family member/points of contact.
    - g. Sent calendar year-end thanks and tax information to 1,800 donors. Corresponded with donors who make multiple gifts in a year as they are moved from individual to annual receipts; numbers increase each year.
    - h. Sent approximately 40 birthday cards per month to donors with lifetime giving of \$25,000+.
    - i. Coordinated the Foundation's holiday card, gift, and flower program. While we try to decrease the number of cards and gifts in order to conserve resources, we still distributed over 900 cards and 14 gifts (holiday swag) to major donors and friends of the university during the holiday season.
    - j. Documented personal stewardship visits to individual donors, with topics ranging from donor history/wants to profile interviews to endowment agreements. Phone calls, emails and informal visits with donors occur on a daily basis.
    - k. Personally steward a portfolio of major donors.
    - l. Collaborated with University Relations to publicize major gifts as they were received.
    - m. Assisted with the hosting of specific Alumni & Friends Events including Homecoming 2018.
    - n. Assisted with Scholarship and Presidential Entertainment events. Represented the
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- Foundation Office at campus and community events.
2. Communications
    - a. Assisted in the gathering of information for press releases for all Foundation gift-related stories and events.
    - b. Provided Foundation gift stories for Alumni's RockeNews.
    - c. Monitored and updated Foundation website content.
    - d. Developed content for Foundation-related publicity and correspondence.
  3. Special Events
    - a. Helped organize and host the 7th Annual Fallen Soldiers 5K Run/Walk. More than 450 people, including volunteers, participated during the race, which raised more than \$12,095 for scholarships.
    - b. Contributed to the planning and execution of the logistics and events surrounding the Founders' Day Ceremony.
    - c. Working to plan and implement the Celebrating Western Banquet which is scheduled for April 12, 2019. Invited more than 1,800 individuals to this event where we will celebrate our loyal donors, hear from student scholarship recipients, and feature some student musical talent.
    - d. Helped to plan, promote, and execute the Sustainability Committee's "Farm to Fork" event. Tickets were sold out and this was a huge success bringing together community members with students, faculty, and staff.
    - e. Planned a dedication ceremony for the Chown Golf Learning Center in conjunction with Homecoming.
    - f. Assisted in the planning of donor-centric events including the Crime Lab Dedication and the Mavigliano/Brabec Art Prize reception event.
  4. Other
    - a. Assisted Development Officers as needed.
    - b. Worked with individual donors on specific gifts.
    - c. Served on the following university committees: Foundation/Alumni/AIMS Information Management team, University Marketing Working Group, and the Sustainability Committee.
    - d. Serving on the search committee for the Development Director for COFAC.
    - e. Working with Shelby Eck to find ways to actively clean up data to make it more accurate and up-to-date.
    - f. Working with Tim Hallinan to help promote the Western Challenge online fundraising event.
  - x. **Prospect Research & Advancement Services**
    1. Utilized DataDesk software to build a predictive model of donor propensity to give for 178,306 alumni and friends. We now have these scores for 11 consecutive years.
    2. Created a form for Development Officers to request prospect research using Google Forms. This has allowed me to gather their requests in a consistent manner and include the information they already know and the specifics they are requesting. I can also track the requests along with their deadlines in a Google Sheet.
    3. Revised instructions and provided training for entering proposals in the MVS/WIUP database to ensure Development Officers are using consistent methods that will allow for accurate reporting of current fundraising activities.
    4. Analyzed wealth screening data as well as internal giving data to discover new prospects to recommend to Development Officers at each monthly Prospect Management Meeting.
    5. Monitored Google News Alerts to capture updates on alumni regarding employment changes, awards, marriages, etc.
    6. Served as a guest speaker for GH299 Fundraising Essentials for Leaders and RPTA424 Volunteerism and Fundraising in Leisure Services, to give students an overview of prospect research.
    7. Conducted individual and corporate research on current and prospective donors to the university.
    8. Created or updated nearly 200 queries and custom Pentaho reports to address specific business needs of Foundation and Development functions.
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9. Proactively researched and reviewed grant opportunities for various projects/programs at the University. Facilitated over 50 applications and proposals for corporate and foundation grants totaling over \$1.4 million with almost \$750,000 funded so far. These funds help support scholarships and initiatives throughout the university and public services.
10. Prioritized and maintained project list of nearly 200 items relating to the MVS/WIUP system in coordination with the Foundation/Alumni/AIMS information management team through bi-weekly meetings.
11. Continued with updating matching gift company records in the database and adding matching gift info to employee records in order to capture more matching gift opportunities and secure additional funds potentially doubling, tripling, or even quadrupling gifts from these donors. \$26,517.73 has been received so far for matching funds in FY19 (compared to \$26,508.83 for the same time period in FY18).
12. Combined or archived 22 edit check reports to eliminate redundancies and increase efficiency of monthly cleanup projects for data accuracy.
13. Contracted with AlumniSync to obtain obituary data on deceased alumni and donors as well as updated phone numbers and addresses for those found to be incorrect by Phonathon or returned mail.
14. The above listed accomplishments align with the Strategic Goal 2, Action 5, Strategic Goal 3, Action 6a, Strategic Goal 5, Action 3b and Strategic Plan Supplement Goal 5, item C.

**b. University Marketing**

- i. Continued to increase WIU's visual presence in Macomb and west-central Illinois, the State, and targeted regions in the world.
    1. Analyzed 2017 media placement, our audience, industry benchmarks, and competition to develop a marketing mix. Mapped out placement of all current marketing media and developed a plan to target ideal regions for reaching our audience. Planned and allocated budget for the year to a zero-based budget in order to maintain strategic alignment.
    2. Established a media strategy from a goal/audience/message perspective with clear metrics to deliver measurable results. Analyzed audience preferences from WIU data to develop a content plan for digital advertising.
    3. Developed a timeline to drive coordination with admissions for cohesive communications
    4. Coordinated across departments to develop the Promise+ campaign program to communicate our Aim High support money as a recruitment strategy for prospective Fall 2019 students.
    5. Created and developed over 200 ads for digital placement; many created within the online platforms. Ads and reports from both ad accounts and web analytics monitored weekly and ads and content revised accordingly to meet industry benchmarks.
    6. Digital marketing purchased through MediaLink on various platforms. Audience included: freshmen undergrads, transfer students, graduate students, out-of-state and international students. Advertising focused on brand awareness, academic strengths of WIU, academic programs, competitive pricing programs, scholarships, student registration, Discover Western, remarketing, junior college events, HS campuses, WIU on-campus promotions to local HS students, online MBA, marketing to India and over 40 program-specific ads.
      - a. Interact.com subscription purchased to develop creative interactive quizzes to engage our audiences
      - b. Niche.com college recruiter package - included display ads on their website, retargeting of Niche WIU profile website visitors, and premium profile on their website.
    7. OTT – streaming TV purchased for the first time at WIU. Ran October – November through MediaLink.
  - ii. Identified and closed gaps in brand touchpoints within the customer journey, with the primary goal to increase enrollment.
    1. Connected across the university with departments and internal systems to identify and close communication gaps in communication content. Developed templates with University Technology and drove updates to over 100 program and campaign webpages to deliver a streamlined user experience.
      - a. Juicer.com subscription purchase – aggregates social media to display on our wiu.edu homepage.
    2. Developed consistency in brand identity application across all touchpoints, and revised all
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- communications with University Relations, from signage to billboards, while working on a long-term brand identity solution. Updated displays on campus – signage produced by VPC:
- a. Posters on three sides of two kiosks on campus
  - b. Window clings for the Union
  - c. Posters for Sherman Hall display cases
- iii. Revitalized the WIU brand and continued efforts to increase pride and confidence for WIU both internally, within the community and the region, for recruitment, retention, and lifetime commitment to WIU.
1. Planned and developed a brand architecture and identity system: University Marketing finalized research, analyzed data and developed draft brand architecture. Developed personas and delivered brand ideas. Up & Up agency contracted to finalize and deliver final brand platform and identity system.
  2. Developed a reputation campaign to deliver across multiple audiences: Successes of Western - Right Here at Home campaign with University Television. Included three 30-second broadcast ads, digital media video 15 sec. and 5 sec. spots to be played in theatres, TV and digital streaming TV (OTT):
    - a. NCM Theaters-Quincy 6 from 2/8 to 3/21/19
    - b. Macomb's Rialto Theater- Annual contract, six screens and lobby television from 7/1/18 to 6/30/19
    - c. Princess Theater in Rushville- 3/1/18 to 6/30/19
    - d. WLS-TV (Chicago) 7/1/18 to 7/27/2018 through Media Link; New Rep campaign
    - e. WTVO (Rockford) 7/1/18 to 7/28/18 through Media Link; New Rep campaign
    - f. WCIA (Springfield) 7/1/18 to 7/28/18 through Media Link; New Rep campaign
    - g. WGN (Chicago) 8/6/18 to 12/30/18 through Media Link
    - h. WIFR (Rockford) 8/6/18 to 12/30/18 through Media Link
    - i. WEEK (Peoria/Bloomington) annual contract through Media Link
    - j. KLJB (Quad Cities) annual contract through Media Link
    - k. KHQA/NHQA (Hannibal) annual contract through Media Link
    - l. WGEM (Quincy) NBC/CW/FOX:
      - i. All Star Game on 7/17/18
      - ii. Two commercials in the QND vs QHS game on 10/19/18
      - iii. Two commercials in the finale of the Masked singer on 2/27/19
    - m. KHQA (Quincy, IL) CBS:
    - n. Nine commercials in a Super Bowl package
    - o. KGCW (Quad Cities)
    - p. One commercial in Cubs vs Cards on 7/22 & on 9/28/18
    - q. Premion (Chicago) OTT (streaming media); 9/10 to 11/4/18 through Media Link
    - r. Strategus (Rockford) OTT (streaming media); 9/10 to 11/4/18 through Media Link
    - s. CASS COMMUNICATIONS (Virginia and Williamsville, IL Systems) -Annual Contract from 7/1/17 to 6/30/19
  3. With University Relations, developed Successes of Western - Right Here at Home campaign with print advertising which included these placements:
    - a. Rockford Register Star - full-page, full-color ad on July 1, 2018.
    - b. Daily Pairings Guide – back cover at the John Deere Classic featuring Supply Chain Management from July 8 to July 14, 2018. Also ran a full-page, full-color ad on the inside cover of the John Deere magazine published on July 1 featuring Here, We Excel.
    - c. McDonough County Voice - Welcome Back tab back cover on August 18, 2018: full-page, full-color ad featuring Rocky and Ray
    - d. McDonough County Voice - Macomb High School sports programs back cover. Full-color ad featuring Here, We Excel
    - e. McDonough County Voice - Fallen Soldier 5K Run/Walk in the Live\*Work\*Shop\*Play section - full-page, full-color ad
    - f. Galesburg Register-Mail
    - g. Monmouth Review Atlas
    - h. Canton Daily Ledger on September 22
    - i. McDonough County Choice on 9/25/18.
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- j. McDonough County Voice - complimentary full-page ad placed in the Look at Western Illinois Progress tab on July 28, featuring Here, We Excel
  - k. Astoria High School Yearbook; Congratulations, Class of 2019 – half page
  - l. Cuba High School Yearbook; Congratulations, Class of 2019 - half page
  - 4. Annual contract billboards feature the following messages at the listed locations:
    - a. Macomb:
    - b. East Jackson- Nearly 100% Job Placement; Explore Supply Chain Management
    - c. West Jackson- Highest CPA Exam Pass Rate of all Illinois Public Universities
    - d. North Lafayette- 100% National Nursing Licensure Exam Pass Rate
    - e. Route 336- Ovarian Cancer Research in University Laboratories
    - f. Good Hope: Top Finisher in Ag Trading Competition with Sherman Hall background; Top Finisher in Ag Trading Competition featuring a student
    - g. Roseville: Highest CPA Exam Pass Rate of all Illinois Public Universities; CPA students studying
    - h. Quincy: 100% National Nursing Licensure Exam Pass Rate
    - i. Springfield: 100% National Nursing Licensure Exam Pass Rate
    - j. Rushville: Investigate a Criminal Justice Career at WIU
    - k. Peoria: Highest CPA Exam Pass Rate of all Illinois Public Universities
  - 5. Advertising within airports in central Illinois:
    - a. Quad City International Airport - backlit sign–annual contract; Excellent Career Opportunities Supply Chain Management
    - b. Peoria International Airport – fabric display near security checkpoint from 7/1/18 to 1/21/19; Think Purple Think Criminal Justice and Public Safety Career Think LEJA Think Western!
    - c. Central Illinois Regional Airport lobby – backlit display in Bloomington, IL- annual contract; Highest CPA Exam Pass Rate of all Illinois Public Universities
  - 6. Tri States Public Radio – supported programming
  - 7. Quincy bus wrap
  - 8. Two truck wraps (shared the cost with Athletics). One featured Football and the other Supply Chain Management
  - 9. Winchester High School video board for 2018-2019 basketball season, including tournaments.- two :30 second ads
  - 10. MHS football field banner
  - 11. Neon logo sign for area restaurant
  - 12. Fallen Soldier 5K Facebook ads to promote the event
  - 13. Redneck 5K Run T-shirt sponsor in Pittsfield, IL
  - 14. Purple t-shirts and polo shirts provided to businesses for their employees to wear during select Think Purple days/weekends throughout the year. An email blast was sent through the Chamber of Commerce to advertise the availability of the shirts.
  - 15. 2019 Colonel Rock Calendar, funded by University Marketing and produced by University Relations with photographs provided by the Visual Production Center.
  - 16. Successes of Western – Right Here at Home - Mailed brochures to HS counselors, administrators, alumni, politicians and influencers.
  - 17. Provided promotional items for high school events hosted on campus and prizes for After-prom, College and Career weeks, project graduations, and AVID programs in area high schools.
  - 18. Continued to enforce the University's licensed vendor policy and visual identity guidelines/logo usage policy. Reviewed hundreds of artwork submissions by licensed vendors for application on promotional goods.
    - a. Continued our contractual relationship with Learfield Licensing Partners (LLP), our licensing agent. LLP collects royalties from our licensed vendors and issues royalty checks to Western on a quarterly basis. LLP also assists in the policing of merchandise bearing Western's logos.
  - 19. Crains – online advertising to promote WIU successes to influencers.
  - c. University Relations**
    - i. Managed Crisis Communication.
-

1. Coordinated/handled media inquiries, including national media, re: budget, layoffs, TSPR funding, reports, Open Meetings Act violations, enrollment, weather incidents, and more.
  2. Coordinated campus safety notices per Clery Act mandate.
  3. Coordinated messages and updates re: budget, incidents on campus, etc.
  - ii. Promoted WIU Programs, Activities, Events & Accomplishments.
    1. Promoted Western's national rankings, Cost Guarantee and recognition from U.S. News & World Report, Princeton Review, GI Jobs, faculty research, Google Impact Challenge, and more.
    2. Participated in national media networks through third party services (NewsWise and Profnet) to promote Western's programs and faculty. Examples include from NewsWise (a service for journalists to find stories and experts): Terrorism book (Dean Alexander), 5,763 hits; Taylorville tornado damage (Chad Sperry), 8,186 hits; domestic terrorism, 6,771 hits; homeland security expert, 7,549 hits; NSF star research, 6,297 hits; Purple Heart recipients meet, 4,610 hits.
    3. Working with local & regional media, wire service reporters, and national media, UR staff coordinated interviews in which Western faculty and staff served as expert sources for such stories as disaster recovery; research; state budget/economy; elections/impeachments; terrorism; law enforcement issues; international issues; and more.
    4. Enhanced efforts with such publications and sites as AASCU (several WIU stories featured in "Credit Hour" biweekly newsletter); Inside Higher Ed; and other specific national publications.
  - iii. Supported WIU Marketing Initiatives/Campaign.
    1. Assisted with the coordination of the University's marketing efforts, including the fourth year of the University's digital marketing campaign, licensing/trademark policy inquiries/infringements, licensing and trademark agreements/approvals and logo approvals, as advertising throughout the state.
    2. Darcie Shinberger, Brad Bainter, Marketing Director Suzi Pritchard, Marketing Assistant Susan Schoonover, and UTV staff, conceived Western's branding initiative/campaign, "Right Here at Home." University Television produced the 30-second commercials as well as 15- and 10-second videos for digital campaign.
    3. Shanee Sullivan designed the 2019 Rocky and Ray Calendar, with photographs from VPC.
  - iv. Supported University Admissions & General Promotions Initiatives.
    1. Public Information Coordinator, Jodi Pospeschil, continued to assist Admissions with a media campaign to promote the Centennial Honors, Commitment and Transfer scholarships by writing and sending news releases to each recipient's hometown paper.
    2. Darcie Shinberger produced accomplishment lists of students for Admissions to share with high school guidance counselors.
    3. Continued design projects and promotions for the University's "The Right Here at Home" marketing campaign.
    4. Produced undergraduate viewbook, as well as additional Admissions recruitment publications and projects to complement the viewbook and other promotional materials.
    5. Designed advertising materials (print ads, billboards, banners, etc.).
    6. Summer Session 2018 and 2019 promotional ads, posters, etc., as well as releases/promotions.
    7. Coordinated press events at the WIU-Macomb and QC campuses.
  - v. Continued Social Media/Web Initiatives for Marketing, Recruitment & Promotions.
    1. Under the direction of Shinberger, with Public Information Coordinators Alisha Looney and Jodi Pospeschil, continue to manage the University's presence on social networks, along with student worker/graduate assistant Amanda Pankhurst.
      - a. As of March 1, 2019, WIU's Facebook page has **72,216** likes/followers (as compared to March 2018- 70,884 likes; March 2017- 67,666 likes; March 2016- 54,138 likes; March 2015- 40,796 likes; March 2014-25,394 likes). (Interesting note: In March 2010, we had only 6,809 likes.)
      - b. UR's Twitter feed, @WesternILUniv, has **18,595** followers (compared to 18,700 in March 2018; 17,500 in March 2017; 12,000 in March 2016; 8,286 in March 2015; 4,916 followers in March 2014).
      - c. WIU's YouTube channel has **2,253** subscribers (1,919, March 2018; 1,407, March 2017;
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- 1,036, March 2016; 783 subscribers in March 2015). Several videos were conceived, produced and edited by UR to promote a variety of WIU programs/initiatives. WIU-produced videos have garnered over 1.5 million views.
- d. WIU's Instagram account has **9,657** followers (7,593, March 2018; 6,325, March 2017; 4,158, March 2016; 2,142, March 2015). Instagram stories, established in 2017, are at 1,563 views. GA Amanda Pankhurst manages the WIU Instagram account.
  - e. Snapchat is experiencing a decline compared to Instagram. WIU's account has **734** followers (compared to 884 in March 2018; 1,170 in March 2017; 181 followers in March 2016).
  - f. Western's LinkedIn page has **71,740** followers (compared to 70,488 in March 2018; 66,559 in March 2017 and 59,453 in March 2016). The University is also represented in LinkedIn Groups, with Looney managing and monitoring a "Western Illinois University Group" (see [www.linkedin.com/groups/65378](http://www.linkedin.com/groups/65378)), which includes **4,728** members.
  - g. Shinberger continues to coordinate the University Facebook page and President Thomas' Facebook page, Twitter account, and blog, and continues to assist in the maintenance of the President's social media initiatives.
- vi. Continued University-Community Outreach Efforts/Professional Development Initiatives.
1. Graphic Designer, Natalie Divan, of VPC presented two class tours for the Department of Art; served as a Building Connections Mentor again; and volunteered for recruiting/speaking with prospective students and parents during Discover Western days. Divan also serves on the St. Paul Home and School Association Golf Outing committee and is chairing the St. Paul Home and School Association Biennial Gala, as well as doing the underwriting, marketing and design for the event.
  2. Graphic Design Associate, Tammy Carson, serves on the church board of First Baptist Church of Macomb, along with the Creative Arts Ministry Team and the Praise Team. She also serves on the planning board and service team of the Outlet Teen Center, a once a month outreach ministry of First Baptist Church of Macomb to teens in the surrounding area that provides them with a safe and positive place to hang out with friends. Carson also works with Youth for Christ serving pizza to teens on Fridays during the school year
  3. Administrative Clerk, Christie Eyler, is a member of the Rushville Community Band, directs various small vocal groups for various events, is the Junior Choir Director, Youth Program team member, Candy Fundraiser, Director of the Junior Choir Spring Musical, assists with Third Sunday Breakfasts at the First Christian Church in Rushville, and is a scorekeeper for RIHS track.
  4. VPC Senior Photographer, George Hartmann, worked with local school districts to provide high quality photography/large format projects to promote programs, etc. Hartmann is a member of the University Photographers Association of America and donates photo services to low-income families, both independently and corporately.
  5. Graphic Designer, Brian Kreps, is a member of Adobe Worldwide.
  6. Webmaster, Jessica Lambert, serves on the Employee Wellness Committee, web accessibility committee, and the iTac web committee.
  7. Public Information Coordinator, Alisha Looney, is a University 100 instructor. Looney serves as a Building Connections mentor, as a member of the Parking Appeals Committee, and as a guest speaker for Communication Department Career Day. She is a member of the Young Professionals of Macomb organization, and is a volunteer for the Relay for Life event in Kewanee, IL.
  8. Public Information Coordinator, Jodi Pospeschil, is a University 100 instructor. She is an advisor for the Alpha Sigma Alpha Sorority; chapter officer (public relations) for the WIU Chapter of Phi Kappa Phi; a member of the ADA Advisory Board; and a member of the Western Courier Publications Board. She is the publicity coordinator for the Macomb Balloon Rally Committee and an Advance Team board member for the Center for Youth and Family Services
  9. Assistant VP, Darcie Shinberger, is a member of the Campus Master Plan Committee, Emergency Management Committee, Emergency Management Core Team, the Center for the Performing Arts Planning Committee, Social Responsibility Task Force, and Fallen Soldier 5K Committee. Shinberger also serves as a Building Connections mentor, and is a "Promoting
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Your Community" panelist for the Chamber's Leadership Academy. She also served as a media relations speaker for the NACUBO certification program. Shinberger assists with the WIU Dance Marathon initiative. She continues to work with local officials to promote WIU and Macomb and, in some instances, assists local city departments with crisis communication efforts.

10. Assistant Photography Manager, Sarah Twidwell, is an active member of the University Photographer's Association of America and serves as a WIU Building Connections mentor. She also owns and operates Ritter Photography.
- vii. Assisted with the University's Freedom of Information Act (FOIA) Requests.
  1. Since July 1, 2018, working with WIU FOIA Officer and University Attorney, Liz Duvall, University Deputy FOIA Officer, Darcie Shinberger, completed well **over 200 FOIA requests** to date (March 8, 2019).
- viii. Continued Publications Initiative Improvements.
  1. Edited and produced external publications, newsletters, billboards, ads, etc. for the division, and institutional marketing efforts, admissions, and student recruitment and orientation to support the institution's strategic plan/marketing efforts, including the new alumni magazine.
  2. Prepared all publications produced by UR (handbook, viewbooks, catalogs, etc.) as accessible PDF documents for posting on WIU website.
  3. University Relations handles all publication initiatives for campus departments and organizations.

**d. Visual Production Center**

- i. Increased Marketing and Outreach Efforts and Improved Services of the Visual Production Center
    1. During FY19 (July 1, 2018 to March 9, 2019) the Visual Production Center has produced **1,809 jobs** (a decrease of 43 jobs compared to July 1, 2017-March 1, 2018).
    2. Continues to aggressively market and promote WIU by offering a variety of products and services, such as stickers, yard signs, WIU Wall Clings, alumigraphix prints, poster prints, and window clings; buttons; fraternity/sorority/honors society posed portraits and composites. Under the direction of Administrative Assistant, Alice Knapp, VPC continues to target parents of student-athletes with e-mails providing links to game day action photos and individual posed photographs.
    3. Due to the ongoing budget situation facing the University, VPC continues to research new vendors and products to save customers money, and provide them with additional options for printing services at a reduced cost. Prices on print sizes up to 16x20 have decreased an average of 40%, and large format print costs have been reduced by an average of 33%. While the number of jobs produced decreased, revenue increased by \$330.
    4. Assistant Photography Manager, Sarah Twidwell, continued to promote VPC services at events such as Grad Prep Day and Student Activities Fair; photographed campus and community events, and provided printing services of graduation orders and special events. She fulfilled other customer requests for images and photographic prints, trained and supervised student photographers and photography interns, and maintained the PhotoShelter digital asset management software as well as the university photo databases.
    5. Larry Dean, former Photographic Lab Manager, organized and photographed events to promote WIU in Macomb, WIU-QC and the extended region.
    6. WIU Senior Photographer, George Hartmann, has promoted VPC's services to community organizations (e.g. MHS).
    7. Brian Kreps and Natalie Divan of VPC's Large Format division completed several large projects on campus and in the community, which have brought not only increased awareness and recognition for the University, but also to VPC. Just a few examples include: Sodexo; The Lamoine Retirement Living; stickers, yard signs, and other signage for numerous campus departments, organizations, as well as the community (Regional Office of Education (ROE) #26 and ROE #33, School of Agriculture, GIS Center, Col. Rock, Provost's office, McDonough County EDSA, McDonough County Search and Rescue, Macomb Police Department, Macomb Bomber Boosters, Canton Little Giants); campaign projects for campus and community (Union windows, University kiosks, University Union elevator wrap); and facelifting projects for Facilities Management by starting to replace stickers on the building signs and redoing and replacing the stickers on the Blue Light boxes for the Office of Public
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Safety. We offered a new backlit material, which was used in the kiosks as well as the Heating Plant. The large format division also hosts class tours for different instructors on campus and provides internship opportunities. Kreps and Divan also attended a two-day workshop in April 2018 (Avery Dennison Digital Films Training in Fenton, MO) to learn how to wrap vehicles. With this training, they now have the ability to design, print, and install on campus. The WEMS van, mini-bus in Facilities Management, an off-campus full-wrap of a garage door, and other partial vehicle wraps have been completed since attending the class.

8. PhotoShelter, VPC's online photo viewing website and digital asset management system is in the process of being customized and having new content added. PhotoShelter has to date (March 9, 2019) **130,963 image files and 1,709 digital image transfers per 90 days.**

**e. University Television**

- i. Created promotional videos to help with University recruitment.
- ii. Streamed events for Athletics: The Jared Elliott Show, WESP's awards, Signing Day and Athletic Director's Updates.
- iii. Streamed live press conferences, graduation ceremonies, Founders' Day, and other events.
- iv. Created promotional and educational materials for the University community.
- v. Provided video support for fundraising events such as Purple & Gold Auction and Performing Arts Society.
- vi. Maintained, programmed, and supported cable Channel 3 and live-streamed WIU Channel 3 to showcase the University.

**C. Indicate measures of productivity by which the unit's successes can be illustrated.**

**a. Annual Giving:**

- i. Phonathon:
  1. Piloted outbound text program to replace phone calls among targeted groups which outperformed calling 3:1 (contact rate and revenue).
  2. Projected FY19 personnel expense savings of \$3,500 for FY19.
- ii. Direct Mail:
  1. Projected FY19 direct mail revenue < 22% of cost.
  2. 50% of Direct Mail initiatives currently showing increased revenues as of time of report.
  3. Increased sustained giving via "Giving Cohort" implementation among select target groups (College Student Personnel, Accounting).
- iii. Crowdfunding/Mobile/Event Fundraising
  1. Implemented 10 crowdfunding campaigns resulting in 249 unique donors and \$37,475 in revenue. (Does not count Alumni Plaza project or Western Challenge.)
  2. Increased mobile revenue from \$14,969 to \$21,182 (+42%) and increased mobile donors by 5% (198 mobile donors).
  3. Implemented third annual "Western Challenge" day of giving, raising \$165K, a 16% increase in revenue over the FY17 event.
  4. Supported fourth successful event-based fundraising event (RPTA Alumni Social – January 2019) raising \$800 from 12 attendees.

**b. Donor Relations/Special Events:**

- i. Many areas have seen an increase in numbers: growth of Foundation Fellows members, number of holiday cards sent, and number of annual receipts sent.
- ii. Positive feedback was received from attendees of Special Events who include: students, parents, donors, faculty, staff, and administration.
- iii. Events fostered a sense of unity and convergence among the university and community.

**c. University Marketing**

- i. Summer reputation campaign June 1 – July 31: 4.5M broadcast ad impressions, 2.1M digital ads with 0.5M people reached and 6-10 average frequency, 327k newspaper circulation
  - ii. OTT – September – November 397k impressions, average video completion 95%, frequency of 3, reached adults ages 35-54 and parents with children ages of 16-20.
  - iii. Broadcast media – increased ad placement quantity 3x while improving or maintaining placement within highly rated programming. 11.25M impressions; 4,451 spots.
  - iv. Website: request info forms up 249% 2417 in 2018-19 as compared to 692 in 2017-18, campus
-

visit reservations on the website up 8%, bounce rates down to 52-62% while last year average was 80%.

- v. Digital media – Developed over 200 creative ads formatted to social platform requirements, many developed within the social platforms. Placed ads were maintained so that they exceeded benchmark click through rates within each category. We had 34 million views of our digital ads as provided for this consolidated report on 3/15/2019.

**d. University Relations**

- i. Successful promotion of events and announcements
  1. Obtaining general media coverage and providing up-to-date news on wiu.edu, Facebook and Twitter feeds are essential, successful elements of the UR media relations program.
  2. Well-established/long-term strong relationships with media outlets beyond region and state - UR is a "go-to" for many media (including Chicago Tribune, AP and regional reporters) who are seeking expert sources, comments on statewide (or nationwide) higher education issues, localizing national issues of significance, etc.
  3. UR staff has promoted numerous press announcements/events for major initiatives, partnerships, prominent campus speakers and events, to name a few.
- ii. Data to Support UR Promotion/Publicity Outcomes
  1. Through University Relations' subscription to Newswise, a comprehensive online database of current news, searchable archives and subscription wire services, **seven** WIU news stories have received a total of **39,175 "hits."**
  2. From July 1, 2018 to March 8, 2019, University Relations news staff (three individuals comprise the news staff) wrote 689 press releases (average 86/month).
  3. Social networking success (video views – WIU YouTube Channel) – Videos posted since July 1, 2018 had thousands of views (too many to count) – this does not count videos viewed as part of digital marketing campaigns or those from WIU FB page.
  4. See Google Analytics Data table in appendix.
- iii. Data to Support UR Publications Outcomes
  1. From July 1, 2018 to March 8, 2019 the Publications staff designed **317 jobs** for **52** WIU departments and organizations, including admissions/recruitment, foundation and development, marketing initiatives, alumni, financial aid, scholarship, graduate studies, WIU-QC, Honors College, and more.
  2. Publications staff prepared 139 design, electronic, and DPS jobs.
  3. Publications staff prepared 178 jobs for printing for an overall total of 705,800 printed pieces from July 1, 2018 to March 9, 2019 for a total of \$191,765.
  4. Since Fall 2010, the Campus Connection is provided only as an e-newsletter (and PDF on the web), for an annual savings of over \$4,000 for University Relations (when Connection was printed and mailed the average annual cost was over \$4,100).

**e. Visual Production Center**

- i. Data to Support Visual Production Center Outcomes
  1. During FY19 (July 1, 2018 to March 8, 2019), the Visual Production Center has produced **1,809 jobs** (a decrease of 43 jobs compared to July 1, 2018-March 8, 2019).
    - a. Total Large Format and Photography (does not include special events): July 1, 2018 to March 8, 2019: **1,055 jobs, with net sales of \$74,740.66** (\$97,345.63 total sales minus \$22,604.97 discounts processed).
  2. More than **754 special event orders** were completed from July 1, 2018 to March 8, 2019. Special event orders include athlete individual and team photos, graduation, honors' convocation, posed studio portraits, LEJA internship photos, and fraternity photos.
    - a. Special Event Orders: July 1, 2018 to March 8, 2019: **Net Sales: \$18,164.50** (\$18,354.50 total sales minus \$190 discounts processed).

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

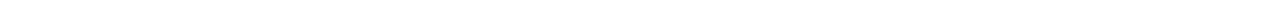
1. Western Illinois University Foundation funds
    - i. \$80,820 for continued contract with Pledgemine to expand variable data printing, targeted direct mail and relationship-building pledge reminder materials
    - ii. \$62,000 for an Accountant II position in the Foundation Accounting office
-

- iii. \$50,000 for unrestricted scholarships
  - iv. \$25,000 for support of TSPR
  - v. \$30,000 for the President's travel and entertainment associated with alumni and development activities
  - vi. \$25,000 for the Nursing Lab
  - vii. \$20,000 to augment the University Marketing budget
  - viii. \$20,000 for faculty research stipends and McDonough awards
  - ix. \$10,000 for spring commencement programs
  - x. \$8,000 for the Minority Achievement Program
  - xi. \$5,000 for summer camp scholarships
  - xii. \$3,475 for travel expenses for nursing students to Lurie
  - xiii. \$3,174 for Town & Gown Alumni Event
  - xiv. \$2,220 for conference registration fees for students to attend Illinois School Psychologist Association Convention
    - xv. \$1,834 for the new donor wall
    - xvi. \$1,828 for ISU Donor Social
    - xvii. \$1,500 for downtown sculpture sponsorship
    - xviii. \$1,000 to PAS for Summer Music Institute scholarships
    - xix. \$946 for sponsorship of Pre-Law Symposium
    - xx. \$650 for the Macomb Balloon Rally
    - xxi. \$500 for support of transportation for the Jazz Studio Orchestra's trip to Springfield
    - xxii. \$500 for sponsorship of Pre-Med Symposium
    - xxiii. \$500 for support of Math Contest
    - xxiv. \$500 to art student to design the Foundation Holiday card
    - xxv. \$357 for Founders' Day
    - xxvi. \$340 for Suzi Miner Memorial Golf Outing
    - xxvii. \$320 to support Purple & Gold Gala
    - xxviii. \$300 for the Macomb Holiday Basketball Tournament
    - xxix. \$250 for Rally for Love t-shirts
    - xxx. \$200 for Theatre and Dance 50<sup>th</sup> Celebration
    - xxxi. \$126 for 2018 Illinois Science Olympiad program printing
    - xxxii. Anticipated support for FY19, not yet spent:
      - a. \$12,000 for GiveCampus crowdfunding platform
      - b. \$9,350 for Blackbaud/AcademicWorks scholarship software for VPSS Scholarship Office
      - c. \$500 Troyer Scholarship until endowed
      - d. \$35,000 for Pentera mailing – moved from appropriated budget this year.
  - 2. Funds available due to vacant positions or dollars saved through hiring of new personnel at whatever level those funds reside.
  - 3. Grants, contracts or local funds
    - i. Local funds from Visual Production Center were used for VPC's digital assessment management system (Photoshelter), student employment, photo editing software, Adobe Creative Cloud and Photo Mechanic, equipment purchases and other operational expenditures (materials, etc).
    - ii. Visual Production Center Local Funds: VPC must generate revenue to defray costs in its large format printing and photographic operations. During FY19 (July 1, 2018 to March 8, 2019), VPC has generated **\$92,905 (net sales)**. Generated income at VPC is essential to operate the services of the department as there is limited appropriated funding for operational support. VPC supports the division and the institution by eliminating assignment fees to all customers, and provides photographic services to Athletic Media Services at **no charge**. VPC has provided \$22,794 in discounts and no charge services to date during FY19.
    - iii. University Television fulfilled the following contracts:
      - a. City of Macomb to manage cable channel 15 for \$12,000
      - b. Macomb Park District for \$1,200
      - c. Center for Best Practices for early childhood videos for \$1,500
      - d. Macomb Police Department for \$500
      - e. McDonough District Hospital for \$750
  - 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 FY19**

For each budget enhancement received in FY19—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 –FY19*

I. Unit submitting report:

Development Office

II. Short title of the initiative receiving funding.

**Interim 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 in the amount of \$16,950 for travel and entertainment expenses to cultivate, solicit, and steward donors in an effort to increase private contributions in support of Western Illinois University.

Vice President has spent \$12,450 through mid-March 2019 on travel & donor cultivation/stewardship, and \$10,168 was spent on Presidential Entertainment Initiatives this fiscal year for football games and football tents.

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

	Enhancement	Department/Unit Funds
Personnel Services	_____	_____
Equipment and Instructional Materials	_____	_____
Library Materials	_____	_____
Contractual Services	_____	_____
Other Operating Funds – Travel & Entertainment expenses	_____ <u>\$ 39,568</u>	_____
Total	<u>_____</u> <u>\$ 39,568</u>	<u>_____</u>

Contact Person If Questions:

Brad Bainter  
Name

309-298-1808  
Phone Number



**Western Illinois University**  
*Accountability Report for Program Support –FY19*

I. Unit submitting report:

University Marketing

II. Short title of the initiative receiving funding.

**FY19 Reputation Marketing throughout the Local Community, State and Targeted Regions both National and International**

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

University Marketing accomplished the following initiatives with FY19 funding:

Television & Cable:	\$144,365.00
OTT:	\$ 15,000.00
TSPR:	\$ 25,000.00
Print ads:	\$ 12,445.00
Cinemas:	\$ 2,820.00
Billboards:	\$ 96,759.56
Airports:	\$ 15,163.97
Digital Marketing:	\$247,546.83
Branding:	\$ 50,000.00
Think Purple T-shirts/Polo shirts:	\$ 20,949.55
Banners/Flags/Hardware:	\$ 3,047.00
Misc. Promotions & Packages*:	\$ 19,242.97
Licenses, Postage, Travel, Telephone:	\$ 838.70

\*Col. Rock 2019 calendars, a truck wrap, Quincy bus wrap, promotional items, and Winchester High School video board

Our continued goal has been to increase the visibility and awareness of Western Illinois University throughout the state, region, and local community. Efforts included the primary goal to support the recruitment activities of our Admissions Office.

We continue to use banners and clings, along with the shirts provided to local businesses, as a part of the local Think Purple campaign to get everyone talking and thinking Western, including guests during their visits to Macomb. Other advertising mediums such as the billboards and movie theater promotions support and carry the current marketing campaign throughout the state of Illinois and into its border states.

We were privileged to have been given a large sum of funding for digital advertising, a measurable proven media for student recruitment.

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

	Univ. Mrktg.	Department/Unit Funds
Personnel Services	<u>\$ 56,672.00</u>	_____
Equipment and Instructional Materials	\$ _____	_____
Commodities	<u>\$ 23,856.98</u>	<u>\$ 7,109.72</u>
Contractual Services	<u>\$ 372,706.10</u>	<u>\$ 1,120.25</u>



### III. Reductions for FY19

- A. Discuss staffing and operational reductions implemented during FY19.
    - a. UTV converted an Associate Director of Television position (A&P) to a Civil Service position with a lower salary. UTV's Broadcasting Engineer retired and the position is not being filled. The Director of Advancement Services position was given up at the beginning of FY19. VPC's Photographic Lab Manager retired and is not being replaced. In response to the 20% across-the-board budget reduction we will not fill two positions that became vacant due to retirements on December 31, 2018. This resulted in FY19 savings of \$55,350 and will also result in continued annual savings of \$110,701. In addition, we expect another retirement at fiscal year-end to result in additional ongoing savings of \$67,780. The resignation of another staff member and the combining of that position with another position in our division also resulted in saving an additional \$42,240 this fiscal year and this will be an ongoing savings. The Foundation already pays for the salary of one member of our accounting area and we will move another position to the foundation at an annual and ongoing savings of \$32,965. Positions not replaced in the VPAPS division now amount to over \$600,000 since 2016.
  
  - B. In response to Item A (above) include the dollar amount for these reductions and whether the reductions result in one-time or continued savings.
    - a. Annual and one-time savings for Advancement and Public Services
      - i. Associate Director of Television conversion from A&P to CS - one time and continued savings
      - ii. UTV Broadcasting Engineer- one time (\$25,614.50) and continued savings (\$51,229)
      - iii. VPC Photographic Lab Manager- one time (\$29,736) and continued savings (\$59,472)
      - iv. Director of Advancement Services- one time (\$17,600) and continued savings (\$42,240)
-

**Budget Year**  
**Fiscal Year 2020**

**IV. Major Objectives and Productivity Measures for FY20**

- A. List the most important goals and objectives the division will pursue in FY20, and how these actions will be measured/assessed.
- B. Of the objectives identified above, please indicate which are directly related to the *2012-2022 Strategic Plan* and/or *2017 Strategic Plan Supplement*.
- C. For those action items noted above, indicate whether you intend to have the action completed in the short-term (next 12 months), mid-term (2-4 years), or long term (5+ years).

**a. Foundation and Development/Development Leadership**

- 1. We continue to strive to increase levels of private support. This year has proven to be very challenging for our development officers.
- 2. In the past fourteen months, we have replaced our Executive Director of Development, Director of Development for the College of Business & Technology, Director of Development for the College of Arts and Sciences, and the Director of Donor Stewardship and Special Events. We are currently in a search for the Director of Development for the College for Fine Arts and Communications. Those are five key positions to our development program and we must establish a level of continuity and stability in our office before we can embark on a campaign.
- 3. Continue to assess needs for every area on campus as we begin the process of preparing for our next comprehensive campaign for Western.
- 4. Prepare to hire new positions needed for a comprehensive campaign. Two new development officers and an assistant director of the annual fund are essential. More support for alumni programs is also needed due to the severe cuts they have faced over several years.
- 5. Specific goals are currently being discussed by each development officer with their dean/director for FY20 as well as looking beyond and setting priorities for each unit in preparation of the next comprehensive campaign.
- 6. College and Department goals will be established to allow the University to reach a goal of \$8.5 million for FY20.
- 7. An established Moves Management System will be initiated to provide for more accurate planning, cultivation, solicitation, and stewardship of major gift prospects by the individual development officers. As budgets allow, more travel to meet face-to-face and present significant proposals will be expected of all development staff.
- 8. Development officers will be expected to take further advantage of opportunities provided through alumni programs to make discovery visits and initial calls upon prospective donors as well as develop new leads for major gift prospects.
- 9. Planning is underway to host a campus event for major gift prospects who will play a significant role in the next comprehensive campaign. The event will showcase recent accomplishments and highlight plans for advancing the mission of the university and the role of private fundraising in a successful campaign.

**ii. Accounting and Gift Processing**

- 1. Staff training will remain the focus in FY20. The focus will not only be on internal Foundation Accounting staff, but also support staff across campus. Other goals include enhancing internal policies, procedures and forms, accounting systems programs, training materials, and process methodologies in the Foundation Accounting area. Although the enactment of the entire plan will take several years to implement, the following items will take priority during the next fiscal year:
    - a. Continue to write policies and procedures for areas in which they are deficient.
    - b. Continue to enhance risk assessment initiatives.
    - c. Continue to enhance training materials.
    - d. Enhance training of support staff across campus.
    - e. Continue to make incremental changes to the Accounting system and processes to improve accuracy of data and efficiency of processing.
-

- f. Participate in relevant training seminars to remain updated on key issues (GASB, FASB, IRS, etc.).
    2. These goals and objectives will be measured by monitoring office productivity and error reductions, and by seeking feedback from our external auditors. These goals mostly relate to Strategic Plan Supplement Goal 5, "Increase Business Acumen." The identified goals fit in both the short-term and long-term category. It is our goal to have a solid foundation built in all of the areas noted within two to four years, but because each is an ongoing initiative, we hope to continue improving in these areas in the long-term.
  - iii. **Annual Giving**
    1. Implement comprehensive outbound text fundraising program to increase alumni giving and revenue. (Strategic Plan Goal 5, Action 3b & 3c)
      - a. Compare data on segments by class year, affinity and academic major.
      - b. Track performance to compare against phone call solicitations.
    2. Support and expand University-wide Crowdfunding initiatives. (Strategic Goal 5, Action 3b & 3c)
      - a. Continue to provide training to campus entities/project managers on creating and fielding successful projects.
      - b. Increase yearly crowdfunding campaigns to a minimum of 12 successful campaigns per year.
      - c. Field Senior Class Giving Campaign on the crowdfunding platform.
    3. Plan and implement fifth annual Western Challenge in April 2020. (Strategic Goal 5, Action 3b & 3c)
      - a. Work with Major Gift Officers in securing major challenge gift(s).
      - b. Increase number of donors and revenue by 15% over the 2019 event.
    4. Continue partial repurposing of Phonathon to include outbound text, stewardship and donor relations activities in addition to solicitation calls. (Strategic Goal 5, Action 3b & 3c)
      - a. As assessed by call metrics and giving rates.
    5. Continue Crowdfunding/Mobile Giving/Event-based fundraising programs among all stakeholders to leverage increased annual fund participation and data collection. (Strategic Goal 5, Action 3b & 3c)
      - a. Assessed by increased Annual Fund participation/monthly reports.
  - iv. **Donor Relations/Special Events**
    1. Create an event, society and/or strategic way to steward loyal donors (giving every fiscal year continuously at any amount).
    2. Clean up preferred program names for our highest-level donors for proper use on the Donor Wall and Foundation mailings.
    3. Create comprehensive stewardship plan to ensure donors at all levels receive 7-10 contacts annually from the Foundation/University.
    4. Create a new format/template for daily acknowledgement letters from VPAPS Office.
    5. Work with the Scholarship Office staff to plan an event or create a new process to streamline scholarship thank you notes from students to donors.
  - v. **Prospect Research**
    1. Design a portfolio summary report to help Development Officers manage prospects flowing into and out of management.
    2. Utilize Pentaho reports to analyze our data as well as research external data to identify potential new prospects and prioritize existing prospects.
    3. Compare the existing DataDesk model with other options for predictive analytics to identify the most likely donors within our database.
    4. Utilize GrantStation and other sources to discover new opportunities for grant funding of various projects at the University. Facilitate the process of applying for funds to ensure applications are compelling and complete for the best chance of being awarded.
    5. Continue to research matching gift companies and update the employee records to increase the amount of funds secured through matching gifts.
    6. Maintain and improve existing scheduled and ad hoc Pentaho reports to ensure data is being distributed in an efficient, useful manner for all users.
    7. Continue to work with the Foundation/Alumni/AIMS team to prioritize and complete project
-

items related to the MVS/WIUP system.

- a. These goals support Strategic Plan Goal 2, Action 5; Goal 3, Action 6a; Goal 5, Action 3b; Strategic Plan Supplement Goal 4, item D; and are all ongoing/short-term.

**b. University Marketing**

- i. Continue to increase WIU's visual presence in Macomb and west-central Illinois, the State, and targeted regions in the world.
  1. Adjust the digital media strategy according to changes in the market and for competitive positioning from a goal/audience/message perspective with clear metrics to deliver measurable results.
  2. Measurement: Closely monitor and evaluate media spending in FY20 to achieve the best value for our marketing expenditures. Dependencies: budget availability, digital media content. (short-term: 12 months)
- ii. Identify and close gaps in brand touchpoints within the customer journey, with the primary goal to increase enrollment.
  1. Redefine website to deliver on an easy-to-find, easy-to-know and easy-to-buy strategy.
  2. Connect regularly with chairs and deans to gather the latest marketing information.
  3. Measurement: latest accurate content reflected in our marketing communications; improved trends in digital traffic. Dependencies: leadership support for centralization; stakeholder availability; web marketing tools and team. (short-term – mid-term: 12 months – 2 years)
- iii. Revitalize the WIU brand and continue efforts to increase pride and confidence for WIU both internally, within the community and the region, for recruitment, retention and lifetime commitment to WIU.
  1. Deliver a brand strategy and identity system with our contracted agency. Establish across the university, a clear brand vision and strategy for a revitalized Western Illinois University brand.
  2. Measurement: An integrated brand launch through a campaign internally and externally, that captures University goals and messaging that resonates with our target audiences. Dependencies: internally-resourced creative team to produce brand tool kit materials, revised communications, stakeholder alignment, and budget for brand activation. Departmental communicators utilizing our brand identity system will be vital to the success of integration of the brand university-wide. (short-term – long-term: 12 months – 5+ years)

**c. University Relations**

- i. University Relations will continue its support of Foundation/giving initiatives.
    1. Support will be measured by the recognition and awareness of alumni, friends, and general public of giving initiatives.
  - ii. University Relations will continue to enhance WIU's reputation and recognition as a top comprehensive university.
    1. Participation in initiatives through news media, social media, and other venues.
    2. Document efforts to obtain institutional recognition through news media subscription services and media exposure.
  - iii. University Relations will obtain national recognition for its programs, students, faculty and initiatives.
    1. As funds allow, will continue to use Newswise posting services and ProfNet experts database (used to promote WIU faculty as expert sources) and feature stories that illustrate WIU's commitment to its core values.
    2. UR will measure its success based on the "hits" WIU stories receive from media outlets.
  - iv. Continue use of social media to promote WIU and its faculty, programs, and services globally; to further enhance Western's recognition and reputation as a quality institution to attract and retain students, faculty and staff; and to engage members of the Western community with an open platform upon which they can provide feedback to the institution and ask questions.
    1. The implementation of social media also supports the strategic plan goal of encouraging the integration of technology to support the University's mission. UR will measure its success based on the "likes" and interaction received via social media outlets.
  - v. University Relations staff will further enhance its publications program, and will continue to produce higher quality/innovative publications, which supports the Strategic Plan Goals 1 & 2 of attracting a diverse student body and faculty to Western.
-

1. Measured by enrollment and faculty hires, as well as focus groups, to rate the publications (particularly Viewbooks).
- vi. University Relations staff will continue its outstanding relationships with media outlets to promote services, events and programs.
  1. Supports the strategic plan goal of public service/outreach and increased participation in University-supported events and programming.
- vii. University Relations and Visual Production Center staff will work to further develop and implement University marketing initiatives as outlined in the strategic plan.
  1. Print publications, visual images and features stories. These are short-, mid- and long-term goals.
- d. Visual Production Center**
  - i. The Visual Production Center will continue to provide outstanding customer service and provide new products to promote the institution. In addition, VPC will continue its relationship with University Archives to better determine the best method possible for archiving WIU's photographic history.
    1. Meet the needs of departments, organizations, and individuals who seek visual images to enhance publications, websites, promotional materials and more.
  - ii. The Visual Production Center will research innovative methods to market services to students and parents, as well as to the general University and local communities.
    1. Supports the strategic plan goal of public service/outreach and increased participation in University-supported events and programming.
  - iii. University Relations and Visual Production Center staff will work to further develop and implement University marketing initiatives as outlined in the strategic plan.
    1. Print publications, visual images and features stories. These are short-, mid- and long-term goals.
- e. University Television**
  - i. Develop recruitment videos for the University and every college and department on campus.
  - ii. Continue promoting Western Illinois University, all University colleges and departments, the community, and west central Illinois.
  - iii. Keep providing television media services to the University and community to enhance student recruitment and instruction.
  - iv. These are all short-term goals related to Strategic Goal 1, Action 3a and Strategic Goal 2, Action 4d.

## V. Technology Goals and Objectives

- A. List the most important technological goals and objectives the division will pursue in FY20, and how these will be measured/assessed.
  - B. Describe how these objectives build upon goals in divisional and/or institutional strategic plans.
  - C. For each technology item, indicate whether you intend to have the action completed in the short-term (next 12 months), mid-term (2-4 years), or long term (5+ years).
    - a. Foundation and Development:**
      - i. Continue to explore commercial options for fundraising/CRM (Constituent Relationship Management) software services in conjunction with WIU's Enterprise Task Force evaluation of university-wide enterprise resource planning systems to convert from the current MVS mainframe.
    - b. Annual Giving:**
      - i. Implement comprehensive outbound text fundraising program to increase alumni participation and revenue (short-term goal).
        1. Implementation of a comprehensive outbound text program will allow the Phonathon callers to engage alumni/donors more effectively in terms of contact rates and revenue generation as part of the annual giving program.
        2. An outbound text program will allow the annual giving program the flexibility to respond to donors' changing preferences in terms of solicitation and contact.
        3. This program will enable the annual giving program to engage in more effective and less intrusive donor outreach that can also include stewardship communications, event registrations and survey implementation.
-

- ii. Facilitate upgrade of existing Phonathon Software (mid-term goal).
  - 1. Industry-wide decreases in Phonathon contact rates and revenue call for a more efficient and cost-effective operating system.
  - 2. A software upgrade will allow for more streamlined and targeted telephone outreach initiative utilizing fewer staff and University support resources.
- c. **Foundation Accounting:**
  - i. Foundation Accounting, like Business Services, is in need of an updated fiscal management ERP System. The University currently has a task force to select the most appropriate platform; this is a long process as it is a major decision that will impact the entire University and will take a considerable amount of time to implement. Further, with little funding support, it is unknown when the University will be able to purchase the new system. The goal of Foundation Accounting, however, is to provide feedback to this task force regarding what features would best serve our area and work together in selecting the most optimal choice.
    - 1. These goals mostly relate to Strategic Plan Supplement Goal 5, “Increasing Business Acumen.” It is our hope that this action can be completed mid-term, but due to roadblocks in state funding, may take 5+ years.
- d. **University Relations:**
  - i. Continue to use social media to promote Western Illinois University is an essential – and constant – technological goal for Fiscal Year 2020. Measured by hits/participation. Little cost is associated with this goal; however, software and equipment updates may be necessary. Upgrades: \$500-1,000. Continuous goal.
  - ii. Staying current with the latest best practices and trends for content design and display on the web, which includes but is not limited to: updating/maintaining code; multimedia use (such as embedded captioned YouTube videos into news releases, other web pages, etc.); and maintaining accessible pages per the Illinois Information Technology Accessibility Act (IITAA). Little cost is associated with this goal; however, software and equipment updates may be necessary. Upgrades: \$500-1,000. Continuous goal.
  - iii. Updating and maintaining design-related software for publications staff will continue to be technology-related goals for FY20. Upgrade/updates: \$1,500. Continuous goal.
  - iv. **If funds allow:** Continue online news media inquiry service at current enhanced level. Enhanced Newswise: \$1,500. Continuous goal.
  - v. UR web services will further refine and enhance the division's online presence. Continuous goal.
  - vi. Develop informative and engaging content that is presented in a visually appealing, consistent and professional manner in order for the University Relations and VPAPS sites to serve as the main sources of information to a mass audience. Continuous goal.
- e. **University Television will:**
  - i. Continue to push to upgrade its HD field and studio equipment.
  - ii. Purchase new computers and HD editing software. (12 months)
  - iii. Stream video live to Facebook and Twitter. (12 months)
  - iv. Add LED studio lighting (12 months)
  - v. Plan on purchasing 4K cameras. (12 months)
  - vi. Replace field gear (i.e. microphones, lighting). (2-4 years)
  - vii. All of the UTV items above will give WIU a more professional look concerning our media outlets. UTV would also become more efficient. By upgrading our video equipment, we will broaden the University’s visual appeal which will help with student recruitment. These goals relate to Strategic Goal 1 Action 3a and Strategic Goal 2 Action 4d.

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

- A. What are planned FY20 reallocations or reorganizations, including the movement of positions, upgrade of positions, creation of new positions, and/or the reallocation of personnel and/or operating funds?
    - a. Foundation Accounting has had an increasing workload due to more reliance being placed on the use of Foundation funds.
  - B. How do these reallocations and reorganizations further *Strategic Plan* and/or *2017 Strategic Plan Supplement* goals and objectives?
-

- a. The Foundation Accounting reallocations indirectly relate to reducing reliance on state funding because of the increase in the use of Foundation funding being supported by staff.
- C. Describe how all reallocations, permanent and temporary, will affect the unit's standard performance measures.
- D. How are you finding new funds?
  - a. Describe divisional strategies to seek additional resources (e.g., grants, Foundation).
    - i. The Annual Giving Program will increase solicitations for unrestricted donations in FY20.
    - ii. UTV will be working with McDonough District Hospital to promote their services. We will also continue to transfer media to digital formats for set fees.
  - b. Provide an explanation of how additional resources would be used to enhance divisional objectives.
    - i. UTVs additional funds can be used to purchase equipment upgrades.
  - c. Summarize long-term external funding goals which extend beyond FY20.
  - d. Develop indicators to track attainment of goals.

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

Not Applicable

## **VIII. Reductions for FY20**

- A. Discuss planned staffing and operational reductions for FY20.
  - B. In response to Item A (above) include the dollar amount for these reductions and whether the reductions result in one-time or continued savings.
    - a. We expect another retirement at fiscal year-end to result in additional ongoing savings of \$67,780.
    - b. The Annual Giving Program is not requesting Graduate Assistant support for FY20 and is reducing total Phonathon staff from 28 to 24 for continued savings in anticipation of minimum wage increases
-

## IX. 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 *FY20 Budget Request Form* for each request.

Priority	Item	Requested by	Amount	Funding type
1	Fundraising Initiatives	Foundation and Development	\$100,000	Continuous
1	Fundraising Travel and Entertainment	Foundation and Development	\$50,000	Continuous
1	Text Solicitation for Annual Giving	Foundation and Development	\$2,250	Continuous
1	Phonathon Software Upgrade	Foundation and Development	\$15,000	Continuous
1	Marketing Operating Funds	University Marketing	\$171,000	Continuous
1	Director of Social Media	University Relations	\$70,000	Continuous
1	Digital Imaging Specialist I	Visual Production Center	\$30,000	Continuous
1	Part-Time Administrative Clerk	Visual Production Center	\$15,000 – \$18,000	Continuous

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**X. Facilities Requests**

- A. Identify, in priority order, requests for facility enhancements over \$100,000. These requests need to be identified as specific FY20 requests or long-range requests. For each request, identify the ways in which the facility enhancement will advance specific *Strategic Plan* and/or *2017 Strategic Plan Supplement* 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 *FY20 Budget Request Form* for each request.
-









**Western Illinois University**  
Budget Request Format  
For Program Support FY20

I. Unit submitting request: *University Marketing* Priority Number   1  

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

*Effective Marketing, Brand Platform, and wiu.edu Experience*

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 strategic plan requires effective marketing.*

*Our new brand platform will be the long-term foundation for effective marketing. Resources are required in order to update our presence and make a visible impression to start to build confidence with all of our audiences. Brand activation requires developing new advertising content, refreshing signage and environments on Macomb and QC campuses. Request: \$65,000*

*Refresh our website to be experience driven. Our branded website is the campus destination for both Macomb and Quad Cities before a student sees or steps foot on our actual campus. The website is also the location where a student makes a final decision to attend WIU. All of our advertising connects to the website and success is dependent on the structure of wiu.edu. Our audiences need a clear path of navigation to access content that is relevant. Over half of our website contains outdated, redundant and inconsistent content which will undermine brand building efforts. 20% of students will remove a university after having a bad experience on a website.\* In addition, over the years we have lost digital content experts and now compiled with the fact that we have less resources to maintain content, efforts need to be restructured and streamlined into one cohesive website.*

*Request: \$70,000 for contract digital content development services, \$36,000 for a revised website platform.*

\*Inside Higher Ed, 2016

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

*Revitalizing the brand for recruitment, retention, and long-term committed WIU alumni. Brand building starts from the inside with everyone – staff, faculty, students and influencers. An updated brand presence is how we activate the defined brand architecture. We will make a visible impression of the brand to start to build confidence and socialize the brand with all of our audiences. The visibility and public adoption of the brand and utilization of our brand assets will be measured.*

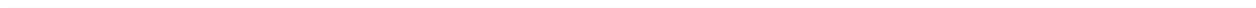
*An experience driven website, delivering on the expectations of prospective students, is vital to increasing enrollment and establishing the brand. Content will be updated and delivered into templates built for the future. Results will be measured with tangible numbers of duration of time spent on our website, requests for more information, visits scheduled and pages visited.*

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

Personnel Services \_\_\_\_\_

Equipment and Instructional Materials \_\_\_\_\_

Library Materials \_\_\_\_\_





**Western Illinois University**  
 Budget Request Format  
 For Program Support FY20

I. Unit submitting request: *University Relations* Priority Number 1

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

*Director of Social Media*

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.

*Keeping abreast of, and maintaining, emerging communication methods is necessary to further enhance Western Illinois University in the public marketplace. This position, which includes supervision of the office that must remain up-to-date on University-related events, programs, and activities, is essential to effectively promote the University and to uphold the institution's reputation and public presence. Due to the ever-changing landscape of communication and digital technologies, it is essential to have a director in place to oversee the University's digital/social media presence and continue to research the best methods of communication for the promotion of WIU among all venues.*

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

*See above. In addition, because of the evolution of social media, digital and traditional communication opportunities, as well as the ever-changing nature of communication, in order to stay on the forefront and keep Western ahead of its peers, it is essential for a position of this nature to be established within the University's public relations department.*

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

Personnel Services	A/P	<u>\$70,000/annually</u>
	C/S	_____
	NTT	_____
	T/T	_____
Equipment and Instructional Materials		_____
Library Materials		_____
Contractual Services		_____
Other Operating Funds		_____
Total		<u>\$70,000/annually</u>

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: Darcie Shinberger 298-1993  
 Name Phone

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## XI. Appendices

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

#### Google Analytics Stats for University Relations' Websites

<b>*Measuring Period</b> <b>July 1, 2018 - March 8, 2019</b>		
<b>New Releases</b> All web pages with URL: news/newsrelease.php	<b>News Page</b> URL: news/index.php	<b>University Relations Page</b> URL: vpaps/university_relations/ index.php
<b>Pageviews</b> 309,322 (up from 254,062 – FY18)	<b>Pageviews</b> 48,643 (up from 38,552)	<b>Pageviews</b> 1,249 (up from 1,182)
<b>Unique Pageviews</b> 273,210 (up from 226,492)	<b>Unique Pageviews</b> 34,811 (up from 25,746)	<b>Unique Pageviews</b> 1,041 (up from 990)

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# Interim Campaign Progress Report July 1, 2018 - June 30, 2019

COLLEGE/UNIT	PLEDGES	GIFTS	GIFTS- IN-KIND	PLANNED GIFTS	FISCAL YEAR TOTAL
CAS	45,776	499,737	75	517,400	1,062,988
CBT	61,696	276,208	740	0	338,644
COEHS	97,393	310,902	150	0	408,445
COFAC	41,075	153,219	4,071	0	198,365
LIBRARY	5,379	10,309	2,292	0	17,980
HONORS	2,880	58,030	219	0	61,129
INTL STUDIES	145	225	0	0	370
STUDENT SERVICES	14,678	364,888	927	0	380,493
QC	20,326	572,217	0	0	592,543
WQPT	236,462	713,610	8,292	0	958,364
ATHLETICS	489,820	101,625	29,289	0	620,734
ALUMNI	4,631	11,814	0	0	16,444
BGS	3,702	17,877	0	0	21,579
TRI-STATES RADIO	125,225	275,290	0	0	400,515
PFA	5,555	1,210	0	0	6,765
UNIV SCHOLARSHIPS	21,634	263,490	1,008	0	286,131
OTHER	11,997	169,669	244	0	181,910
<b>UNIVERSITY TOTALS:</b>	<b>1,188,374</b>	<b>3,800,319</b>	<b>47,306</b>	<b>517,400</b>	<b>5,553,399</b>

Outside scholarships not included in report: \$ 1,096,599

PURPOSE: Record of fiscal year progress by unit

AUDIENCE: Internal use for administrators, development officers, and board members

NOTES: Gifts do not include pledge payments.

Radio is separate from COFAC; Parent and Family Association is separate from Student Services.

Gifts-in-kind do not include service or noncharitable gifts-in-kind.

Printed on 2019-04-10



# Annual Fund Report July 1, 2018 - June 30, 2019

COLLEGE/UNIT	# OF PLEDGES	TOTAL PLEDGES	AVERAGE PLEDGE	PLEDGES PAID	CASH	GIK	GIK PAID	*TOTAL GIFTS
CAS	248	26,396	106	19,966	79,525	75	0	99,566
CBT	360	40,616	113	26,855	89,585	740	0	117,180
COEHS	237	24,785	105	16,554	105,625	150	0	122,328
COFAC	123	22,950	187	13,171	77,577	4,071	0	94,818
ALUMNI	8	953	119	716	9,074	0	0	9,790
INTL STUDIES	2	145	73	100	225	0	0	325
LIBRARY	12	5,379	448	4,629	10,309	2,292	0	17,230
HONORS	5	1,350	270	1,130	8,030	219	0	9,379
QC	14	5,326	380	2,753	10,300	0	0	13,053
ATHLETICS	817	238,420	292	235,799	78,475	29,289	0	343,563
STUDENT SERVICES	37	5,328	144	3,327	12,427	827	0	16,580
BGS	87	3,702	43	2,095	5,777	0	0	7,872
TRI-STATES RADIO	541	125,225	231	88,760	273,290	0	0	362,050
WQPT	452	236,462	523	92,352	713,550	8,292	0	814,194
PFA	144	5,555	39	2,305	1,210	0	0	3,515
SCHOLARSHIPS	247	21,091	85	17,905	77,168	1,008	0	96,080
OTHER	72	7,184	100	4,980	105,329	244	0	110,553
<b>Total</b>	<b>3,406</b>	<b>770,868</b>	<b>226</b>	<b>533,398</b>	<b>1,657,473</b>	<b>47,206</b>	<b>0</b>	<b>2,238,076</b>

**\*\*Total Annual Fund: \$2,475,547**

Above Pledge totals include:

Leatherneck Club	\$ 238,291
Library Atrium Society	\$ 5,379
Performing Arts Society	\$ 8,898

Above Receipt totals include:

Leatherneck Club	\$ 252,511
Library Atrium Society	\$ 11,608
Performing Arts Society	\$ 31,450

PURPOSE: Record of fiscal year Annual Fund totals by Unit; includes Phonathon and President's Scholarship totals.

AUDIENCE: Internal use for administrators, development officers, and board members.

NOTES:

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

\*\*Total Annual Fund equals sum of Pledges, GIKs, and Cash.

Radio is separate from COFAC; Parent and Family Association is separate from Student Services.

Gifts-in-kind do not include service or noncharitable GIKs.

Printed on 2019-04-10



# Phonathon Report July 1, 2018 - June 30, 2019

COLLEGE/UNIT	# OF PLEDGES	TOTAL PLEDGES	AVERAGE PLEDGE	PLEDGES PAID	CASH	GIK	GIK PAID	*TOTAL GIFTS
CAS	227	15,833	70	12,032	0	0	0	12,032
CBT	309	20,010	65	11,440	50	0	0	11,490
COEHS	217	9,390	43	5,590	0	0	0	5,590
COFAC	83	3,935	47	2,245	0	0	0	2,245
ALUMNI	2	300	150	300	0	0	0	300
INTL STUDIES	1	25	25	0	0	0	0	0
LIBRARY	4	100	25	75	0	0	0	75
HONORS	0	0	0	0	0	0	0	0
QC	0	0	0	0	0	0	0	0
ATHLETICS	57	6,000	105	4,640	0	0	0	4,640
STUDENT SERVICES	25	1,475	59	300	0	0	0	300
BGS	86	3,600	42	2,010	0	0	0	2,010
TRI-STATES RADIO	3	75	25	25	0	0	0	25
WQPT	2	135	68	0	0	0	0	0
PFA	144	5,555	39	2,305	0	0	0	2,305
SCHOLARSHIPS	220	16,057	73	13,252	695	0	0	13,947
OTHER	48	2,055	43	760	0	0	0	760
<b>Total</b>	<b>1,428</b>	<b>84,545</b>	<b>59</b>	<b>54,974</b>	<b>745</b>	<b>0</b>	<b>0</b>	<b>55,719</b>

\*\*Total Phonathon: \$85,290

Above Pledge totals include:

Leatherneck Club           \$ 5,875  
Library Atrium Society       \$ 100  
Performing Arts Society     \$ 100

Above Receipt totals include:

Leatherneck Club           \$ 4,640  
Library Atrium Society       \$ 75  
Performing Arts Society     \$ 0

PURPOSE: Record of fiscal year Phonathon totals by Unit.

AUDIENCE: Internal use for administrators, development officers, and board members.

NOTES:

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

\*\*Total Phonathon equals sum of Pledges, GIKs, and Cash.

Radio is separate from COFAC; Parent and Family Association is separate from Student Services.

Gifts-in-kind do not include service or noncharitable GIKs.

See Annual Fund report for all phonathon and annual fund totals.

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