

## **2019-2021 Biennium Internal Budget Proposal Narrative**

### **Division: University Advancement**

**Evaluation Criteria:** Proposals will be evaluated on every aspect of this template. It is highly recommended that the narrative portion touch on each area. Proposals forwarded to UPRC by unit leaders will be discussed at UPRC and authors are encouraged to attend so that they may answer questions and provide clarification.

#### **100% Funding for Associate Director for Alumni and Constituent Engagement**

- This is a revised version of a previously submitted budget proposal.  
*If box is checked please briefly outline any significant changes and/or indicate why it is being resubmitted.*

This is being resubmitted for consideration as the prior year's emergent proposal was funded 50% permanently and 50% for one year, with one-time funding. We are looking to secure 100% permanent funding for this position.

**Statement of Purpose:** *(What is the challenge or opportunity being addressed? How does the proposal address this challenge or opportunity? Limit response to 1 page – please link to any existing reports, data, supplemental materials, etc.)*

The concept of alumni engagement, and how we increase engagement with our alumni and constituents, has become the touchstone for most advancement organizations supporting higher education. Integrated advancement organizations are looking for more and more ways to emphasize the importance of engagement because data shows that constituents with strong engagement also have greater propensity to support the University in other ways, including with their financial gifts. However, the key to a successful engagement model is not just providing more opportunities for engagement, but also capturing the many ways constituents are already engaging with the University beyond just what Advancement sees. We find that alumni and constituents are already engaging with our University in many ways, however, we do not have processes or systems in place to adequately capture that information. If we could better capture that information and aggregate it with the data that Advancement already has, we could make better decisions about who to reach out to, and what ways they might like to further engage with the University.

University Advancement has implemented a new initiative called “Western Engaged” (WE). The intent is to encourage colleges and divisions to participate in the engagement process through the implementation of new systems, processes, and training across the University. Western Engaged is becoming the language we use to talk about our alumni and constituents. University Advancement has already made a commitment to a new integrated CRM system (Ellucian CRM Advance) which will address the system needs, and we have two colleges that are piloting the program (CFPA and CBE) with another who is eager to join.

Since the last budget cycle, we have placed one of our staff into this role and are seeing immediate impact. This dedicated person is working with our different units to help them

identify and capture engagement data, but also helping them set up additional opportunities to engage in the form of reunions

This budget request is to provide permanent funding for the remaining 50% for the **Associate Director of Alumni and Constituent Engagement**.

**Anticipated Outcome(s):**

Through the addition of this staff person, we have been able to launch the WE initiative much sooner and with greater momentum. As we have introduced this concept to different groups on campus, we have been pleased that the groups have responded well and are realizing how an integrated and centralized focus on engagement can lead to greater results.

**Metrics:** *(How will outcomes be measured? Please include current data points and goals. If this proposal will have any impact on the [Overall Metrics](#) included in the university’s strategic plan, please indicate which specific ones here.)*

Since beginning their work in July, this staff person has scheduled and supported 11 departmental reunions with attendance exceeding 450 alumni. Through the rest of this year there are another 13 reunions on the books with expected attendance of over 550 alumni. These are 1,000 alums that may not have had another reason to come to campus.

**How does this proposal align with your departmental/divisional strategic priorities?** *(Please reference specific items from the recently completed departmental/divisional strategic plan and attach a copy.)*

It fits within our final unit objective which is to “introduce and gain acceptance of Western Engaged throughout the entire campus by 2021”.

Relation to WWU Core Themes (should this be goals instead?)	Unit Objective	Initiative Title	Recurring Personnel Costs (including benefits)	Non-Personnel Recurring Costs (does not include one-time needs)	Expected Implementation Biennium	Primary Funding Source
Washington Impact	Raise \$20 Million for a capital project by 2021	Capital Campaign	No additional short-term funding required	No additional short-term funding required	2019-21	Private Funds
Inclusive Success	Raise \$10 Million for the Student Success Initiative by June 2021	Student Success Initiative	No additional short-term funding required	No additional short-term funding required	2019-21	Private Funds
Inclusive Success	Increase major gift revenue year over year	Major Gift Revenue	Each Major Gift Officer (\$125k) adds \$500k to \$1.0 Million in gift revenue	\$50k- \$75k	2019-21	Internal to Unit
Inclusive Success	Increase Annual Giving by average of 5% annually over 6 years	Annual Giving	\$125k	\$50k- \$75k	2019-21	Internal to Unit
Academic Excellence	By 2022, complete one real estate project or transaction that meets an important need of the University and provides a financial return to the Foundation	Non-Philanthropic Revenue Support	\$150k	\$50k- \$75k	2019-21	Other
Washington Impact	Introduce and gain acceptance of Western Engaged throughout the entire campus by 2021	Western Engaged	\$42k	No additional short-term funding required	2019-21	Other

**How does this proposal support the University Mission and Strategic Objectives?** *(Please refer to the [2018-2025 Strategic Plan](#) and indicate which core theme(s) this proposal will help achieve.)*

Greater engagement, leading to greater fundraising success aligns with the University mission and strategic plan as all of the objectives (Washington Impact, Inclusive Success, and Academic Impact) benefit directly from the availability of greater funding.

**What are the consequences of not funding this proposal?**

If this position is not fully funded, we may be required to reduce this staff person's focus on growing engagement, and ask them to do other things to help maintain the ongoing operations of the unit.

**What alternatives were explored?**

There are really no alternatives to fully funding this position. The only other option would be to try to allocate different tasks across the existing Advancement team members. However, this is not really feasible as existing team members will not be able to dedicate the time and focus required to make this initiative a success.

**Which units (departments, colleges, etc.) will be involved?**

As discussed above, this position has direct impact across all colleges and departments. Initially, this position is focusing on the pilot colleges, but ultimately, this person will engage across the entire campus and be integral to their advancement initiatives.

**Equipment needed:**

[Click here to enter text](#)

*For major (>\$25k) purchases, please provide the following information.*

**Item:**

There are no anticipated equipment needs that would exceed \$25k

**Purpose:**

[Click here to enter text](#)

**Cost:**

[Click here to enter text](#)

**Anticipated Useful Life:**

[Click here to enter text](#)

**Replacement Cost if any:**

[Click here to enter text](#)

**Human Resources** *(Complete the table below adding additional rows if necessary):*

<i>Position Title</i>	<i>Total Headcount</i>	<i>Total FTE</i>	<i>Salary and Benefits per FTE</i>	<i>Total Cost</i>
Associate Director of Alumni and Constituent Engagement	1.0	1.0	\$82,250 x 50% = \$41,125	\$41,125

*Table above should match data on budget spreadsheets submitted with this proposal. Complete the spreadsheet to get salary, benefit, and total cost amounts. Contact your division budget officer with questions.*

**Operating & Maintenance Costs (include service contracts, installation costs, etc.):**

[Click here to enter text](#)

**Space Requirements:**

**What type of space is needed for this proposal? (e.g., private office, lab space, group work/study space, etc.)**

Office Space

**What features must this space have? (e.g., fume hoods, plumbing, 3-phase power, etc.)**

[Click here to enter text](#)

**What needs can be accommodated within your existing space?**

All needs can be accommodated within existing space

**How much new space will be required?**

[Click here to enter text](#)