State of the Department. 2008
Institutional Advancement
Texas A&M University – Corpus Christi
Presented by Trent Hill, VP

In 2008, Institutional Advancement began to implement the initiatives designed to move the University into the next phase of its Capital Campaign. With the guidance of our campaign consultant Arthur Criscillis, of Alexander, Haas, Martin and Partners, we are now better informed about our donor base – more specifically about who our top donors are, their capacities and proclivities to give, and their funding priorities. We've carefully studies the findings of our consultants and have aligned them to the campaign’s mission to achieve the imperatives identified in Dr. Killebrew’s Momentum 2015 strategic initiative — excellence, expansion, engagement.

Among our findings has been the realization that our tested goal of $50 million is perhaps too ambitious for this community at this time. Upon completion of the feasibility study and extensive interviews with Corpus Christi’s philanthropic community, the firm’s recommendation is to embark instead on a public goal to raise $25 million with a $30 million challenge goal, based on a five-year payout. Local community leaders and University friends Larry and Karen Urban will serve as campaign co-chairs. In FY 08, as of April 10 we have raised $10.6 million.

In addition, the department took the lead in celebrating the University’s 60th anniversary. We chaired a committee that brought together diverse members from across campus and generated a dozen ideas and events that helped spotlight this momentous occasion in the history of the University. Among the most memorable is a beautiful pictorial “coffee table” book created entirely by our Marketing and Communications people that looks back at where we have been and where we want to go. We also secured a gift from alumnus Woo Sung Lee for a future Welcome Center on Ennis Joslin, worked tirelessly with the City to secure the South Guth land gift, continued collaborations with the port and refinery communities as well as the Texas Legislature to promote an Engineering School; and worked across departments and disciplines to raise funds and build endowments to help hold the line on tuition costs for our students. In a historic move, we entered into an agreement with the Port, the City, and the World Affairs Council of South Texas to initiate a program on campus that specifically focuses on building the University’s international presence both at home and abroad. In the fall we will be continuing an element of the 60th anniversary, a speaker series designed to promote greater dialogue about policies and practices around the world that have an effect on our own community. Former congressman Charlie Wilson has already agreed to be our first speaker.

Following is a brief synopsis of the year, broken down by the major focal points in Institutional Advancement: Development, Marketing and Communications, Alumni Relations and Advancement Services.

Development
General/Administrative
In early FY08, a reorganization of the Development Department occurred in coordination with that of Institutional Advancement. As a result, the following were restructured:

- Alumni Office Director reports to the Vice President for Institutional Advancement (VPIA) and not the Assistant Vice President for Development (AVPD)
- Advancement Services Director and staff report to the AVPD and not the VPIA
- Special Events Coordinator reports to the AVP for Marketing and Communications
- Scholarship Office Coordinator reports to the Foundation Liaison
- Development Officer-Annual Funds reports to AVPD, not Director of Development
- Title of Director of Foundation and Donor Relations was changed to Director of Foundation and Corporate Relations
- Class Agent Program has been transferred to Alumni Office Director
As part of the reorganization, the following occurred:

- 17 members of the development staff were given revised PDQs in an effort to re-focus the staff on fund-raising, donor, prospect and stewardship efforts.
- Weekly staff meetings with all staff were established with written minutes provided to VPIA.
- Efforts were made to increase staff accountability and responsibility through calendar sharing, call reports, leave documentation, and work reports to direct supervisors.
- Written reports from all development staff attending conferences have been received.
- Budget accounts within the department were consolidated.
- A "holiday coverage" schedule was established for the development office where specific officers were "on call" for the Christmas holidays and responsible to check messages into the office regarding potential year-end gifts.
- Central development office files were established.

Additionally, a number of projects were completed:

- Transfers of the Joslin and Campbell Endowments were made by the university to the foundation, resulting in approximately $1 million in endowment to now be utilized. This project had been pending since 2004 due to System and Attorney General issues.
- Updated Raisers Edge to include two Heritage Society members.
- Updated planned giving website information.
- Worked with Finance and Administration to add spending account balances to endowment balances that were less than $10,000. This will allow three endowments to now be available for scholarship award immediately, with another four scholarship endowments to be available in the near future.
- Planned giving files are in the pipeline for contact by a development officer.
- Written reports from development staff attending conferences are being received.
- Written reports from deans regarding use of their annual fund dollars are being received.
- Evaluated PG Calc and Crescendo Interactive and determined that PG Calc will not be renewed.

Planned Giving

- In FY08, the University became the beneficiary of ½ of the remainder of the Virginia T. Rankin (deceased) Trust. According to the trust department at Frost Bank, the university can expect approximately $65,000 from this irrevocable trust. Depending upon the need for an estate tax return and the marketability of all the trust assets, it could take until late FY '09 to receive this gift. The funds are to be used by the University in the form of scholarships for deserving students.

- Marketing to professional advisors occurred in October 2007 and in February 2008 the University hosted along with Wells Fargo Private Client Services, 15-20 estate planning attorneys for a three day Estate Planning and Probate course and a two day Advanced Drafting course. In addition, in May of 2008, the development office will co-sponsor the Corpus Christi Estate Planning Council's annual seminar with approximately 200 attorneys, CPAs and other professional advisors attending.

- GiftLegacy, the weekly online newsletter for our donor and prospects continued for FY08. The newsletter is currently sent to approximately 142 university donors, and prospects consisting of alumni and friends.

- IRA Charitable Rollover solicitation letter was crafted, signed and mailed to 1,438 donors/prospects age 69 and over to inform them of the IRA charitable rollover giving opportunity available in 2007. This solicitation generated 4 IRA rollover gifts, one each from Dee and Ted Stephens, Gloria and Bob Furgason, Bettie and T.D. Higginbotham, and Anne Armstrong. All gifts received totaled $32,125.
Annual Fund Programs

Achieve Partnership
The Achieve Partnership scholarship program continues to increase in dollars received and in membership. For the second consecutive year since the program was implemented in 2000, dollars received exceeded the goal. Total dollars received for FY07 was 80,700, which was slightly above the goal of $80,000. Of the $80,700, approximately $21,000 were net revenues from the State of the University Luncheon. Total members for FY07 were 116 up from the 110 in the prior year. The State of the University Luncheon has grown over the last three years to become a significant part of the total dollars received for the Achieve Partnership program.

For FY08, as of April 15, 2008, $53,000 (approximately $50,000 expected net revenues from the State of the University Luncheon) has been received. It is expected that with Luncheon net revenues and private gifts total dollars received for FY08 will increase to over $100,000.

President's Council
Total dollars received as of April 15 for FY08 is $94,000, which is 70% of the goal of $135,000. This compares to total dollars raised in this program in FY07 of $115,455. Current active membership is 76 members through April 15, 2008, compared with 79 current active members as of April 15, 2007. A second letter of appeal to approximately 25 LYBUNTS and 15 additional names provided by Dee and Ted Stephens, the 2008 PC co-chairs, was mailed on April 25, 2008. With four months left in the year, it is expected that the goal will be reached.

Campus Campaign
As of March 31, 2008, 50.48% of the campus community has given to the campaign with $47,340.55 pledged, of which $43,170 has been received. This is the largest campus participation rate ever for this campaign. In FY07, a total of $53,563 was received. Solicitation of the campus community will continue through May 31, 2008.

Class Agent Program
Implemented in 2006, the class agent program increases young alumni giving and engages graduating students in the activities of the alumni association. The class of 2007 raised $1,415 with gifts from 67 graduating students. This represents an increase in young alumni giving with 5% of the graduating class of 2007 contributing. Of the class of 2007 dollars raised and gifts received, only $281 and 14 gifts are considered FY08 amounts. The FY08 dollars raised and number of gifts received are expected to increase as May and summer graduates from the class of 2008 are solicited.

Annual Fund – Alumni, parents, friends, direct mail and ECC
- Islander Fund (Alumni) Total dollars received for FY07 was $43,412. For FY08, $65,378 has been pledged by alumni. Historically the collection rate is 60% of pledged gifts which would yield a received amount of $39,227. Together with outright gifts of $8,285, the total received amount is expected to be $47,512. Compared to FY07, this is an increase of approximately 10%.

- Parents’ Council Total dollars received for FY07 was $60,283. For FY08, $72,003 has been pledged to the Parents Council. Historically the collection rate is 60% of pledged gifts which would yield a received amount of $43,200. Together with outright gifts of $7,825, the total received amount is expected to be $51,025. Compared to FY07, this is a decrease of approximately 15%.

- Total year-to-date gifts received from alumni, parents, and friends solicited through direct mail and the Electronic Calling Center as of March 31, 2008 totaled $100,224.52 compared to $97,363.72 in FY07.

Tarpon Foundation
Dollars received to date for FY08 are $136,000, compared to $112,000 same time last year. It is expected that dollars received for FY08 will exceed the $333,500 received in FY07. This FY07 amount does not include net revenues of $305,000 from the Stripes event. Net revenues for the FY08 Stripes event will increase to $335,000.
Foundation and Corporate Relations
The goal for foundation and corporate support in FY08 is $522,500. We received $150,000 from the Moore Foundation for the Math and Science Center. As in previous years, the Kenedy Foundation has committed to $50,000 for annual scholarships. We also secured $100,000 in grants from the Greater Texas Foundation to establish an endowment of $200K ($100,000 is the match from the University). The Serrao Foundation added to the current scholarship endowment and is assisting with solicitations for more donations to this memorial. Work is ongoing on corporate proposals for engineering school support endowment: Port Industries, CITGO, Flint Hills, AEP). We continue to broaden the base of foundation support by identifying new funding prospects and submitting letters of inquiry/proposals. Letters of inquiry have been mailed to Terry Foundation, AT&T Foundation, and Motorola.

Scholarship Endowments
The goal for scholarships in FY08 is $275,000. For the year, the following new scholarship endowments have been established: STARR Memorial - $10,000; Danny Kloster - $10,000; Bettie and T. D. Higginbotham - $10,000; Chela Storm $25,000, and Josh Mazurek - $10,000. Endowments that are expected to be completed by end of fiscal year include: Sembradores De Corpus Christi; Dick Connolly; Sigma Theta Tau; and Carl Beaver; all of which will total approximately $54,000. As reported above, the Greater Texas Foundation gave $100,000 to establish an endowment. Additionally, the largest gift to scholarships ever received by the university, from the Atkins Estate was received in FY08 in the amount of $5,047,641. To date we have exceeded the goal.

Special Events
Fiscal year 2008 marked the celebration of the University’s 60th Anniversary. Several events commemorated this occasion. Some of the highlighted events were the State of the University Luncheon, the 60th Anniversary Speaker Series, Islander Lights and the Homecoming Bash. These events successfully promoted the University to the community and established new donor relation contacts.

A variety of stewardship and recognition events occurred. The events were intended to recognize and thank the donors while providing them the opportunity to be a part of the campus community and meet the students, faculty and staff. Fall events included the President’s Council Reception, the Island Showcase and the Lee House Deed Signing. Continuing in the spring were the Endowed Scholarship Council Scholarship Banquet, the Dugan Wellness Center Topping-Out Ceremony, the South Guth Deed Signing Ceremony, Chapman Fieldhouse Ribbon Cutting Ceremony and the President’s Council Art Competition and Reception.

By the end of FY08 a total of 48 special events will have been completed. This function has been moved to Marketing & Communications as of April 18, 2008.

Marketing and Communications
We had another excellent news services year with placements in area print, television and radio media. On the upswing were our live remotes with television stations for early morning broadcasts, as well as guest segments on several of the radio stations in the market. While we continue to seek an ongoing program of statewide media placement and select national print placement, we are focusing further on honing the faculty to provide trend and issue expertise for the larger markets.

A repeat sold-out performance by Michael Martin Murphey at the Performing Arts Center was spirited by targeted placement of advertising in print and radio. This similar media saturation supported the sell-out for the spring’s Glenn Miller Orchestra performance. However, two shows — an a capella group and the comedian troupe Second City did not hit the anticipated goals. Concentration in the next performance year will be on Winter Texan thrusts to ensure that the Bravo! Series maintains fluid revenues for supporting its endowment growth.

There is now a stronger focus on promoting theatrical performances by the theater students for their performances in the Warren and Wilson theaters. This includes an assertive media program, accompanied by marketing collateral. These performances also are boosted on Web banners on Caller.com and Corpus Christi Daily. The telephone system’s music-on-hold service extends public outreach for these performances, as well as the University’s film series, Women’s Center productions, and other performance-based events.
Expanding the freelance design base has allowed the operation to both increase its production quantity and heighten the quality of materials. The use of these independent agents also supports the work underway on the graphic identity migration, recruitment collaterals, and short-term projects that require extensive production hours.

We embraced the launch of the University’s 60th Anniversary through the creation and debut of the commemorative book of the best images from contemporary times, coupled with campus history chronicled through early photographs. The full staff pitched together in several ways to bring about the book’s development, completion and promotion. By mid-year we launched the debut of the Regional Transit Authority’s first wrapped bus-- an assembly of life-sized images of our diverse student body.

The 60th Anniversary also opened the opportunity to promote the new speakers series, where MarCom led promotional efforts to gain attendance from students, employees and the general public. Even the Texas “bigfoot” film had an impressive crowd.

The educational marketing firm Stamats was contracted to work with MarCom to implement the redevelopment of the University’s Web site. Through on-campus focus group sessions, an analysis of the current Web site, and the thrust the University is moving toward in student attainment and client support, a intuitive navigational architecture was created on which new pages are being crafted. The University provided ample feedback on content structure and preliminary design concepts that were reworked to craft the final construction templates for first-, second- and third-level Web pages. The delivery of the finalized HTML-coded pages are due within days with the goal of having the new homepage, secondary pages and various tertiary sites in place just prior to the beginning of the fall 2008 semester. Throughout the process, there has been top-flight support by a representative task force and individuals positioned for the site’s implementation.

The operation took on the monthly crafting of fresh stewardship letters for mailing to donors. This has now become an automated task to support both develop and advancement operations. The letters infuse current events for promoting the campus and enlightening donors on “points of pride” that the University desire to communicate.

With the launch of the Dialogic Communications Corporation emergency communications system came issues regarding data integrity. While the MarCom operation is the University’s focal point for training, support and implementation, many departments throughout campus also share responsibility for data uploads, staff and student orientation, and critical emergency notification. Training of the University Police Department’s dispatch operation continues, with the near-term goal of their ability to provide 24/7 critical emergency communications.

The MarCom operation took a deeper role in the expediting of Homecoming through co-chair activity coordination, extensive marketing, and on-site event support. We learned, however, that this particular series of events may not be providing the campus the return on its investment as should be expected. Alumni and the general public were reached through various advertising and direct mail vehicles, as well as spot placement in the University’s magazine, and numerous news stories prior to and during the event. It appears, though, that our alumni may not be conditioned to want to attend some of Homecoming’s events in their present form. As these activities are regenerated in the upcoming fiscal year, MarCom will provide its continued market promotional tactics.

Great media attention came to the Wellness Center topping out, the deed signing ceremony and the nursing building groundbreaking. These major events in the University’s history had ample play among many publics.

The University also was touted in the endeavors of the Clearinghouse for Mexican American Research during the March symposium honoring the life and work of Dr. Hector P. Garcia. MarCom worked hands-on with event coordinator Anthony Quiroz in the promotion and planning to ensure a significant media gain and public attendance. The activities associated with the event were highlighted as social, community and historical accomplishments.

The operation greatly supported the role of the President in his State of the University address through many weeks of labor expended on the crafting of his presentation that involved video media, talking points and presentation graphics. All staff were invested in the program, and the event made a highly positive impact to the community. The University’s Islander magazine is now on track as a twice-annual publication. The staff commitment now brings forth a publication comprising newsworthy articles that are more targeted in providing emphasis on the University’s people, programs and prosperity. The magazine now has a promised frequency which will build readership.
Enrollment marketing activities continue to support the University’s bottom line by heightening the number of new students and promoting the largesse of the institution to publics throughout the state. Heavy concentrations on advertising and direct mail have brought Island Day attendance to record numbers of around 1,100 people. The Anycollege.com Web college search has proven itself extremely fruitful by bringing forth around 300 prospects each month, and we will discontinue Hobson’s Collegeview site because of continual years of lesser returns. Gaining nearly 500 new prospects each month from the high school magazine Next Step is a strong win that allows us to discontinue the Townsend-brand publications. We continue to weigh continuing Peterson’s Web presence.

The new series of viewbook materials have borne other collaterals of similar motif that will be utilized throughout an 18-month timeframe. The scope of extending the usage of this viewbook and complementary search piece now pushes us to have new materials debut during the summer, the most appropriate time for the placing fresher academic content into the publication and aligning best with the fall recruitment push.

The enrollment materials highlight our new push to photograph a collection of diverse, photogenic students whose images have improved the look of the campus in its marketing materials. Additional photography of students in action, laboratories and buildings now are part of the Image Gallery available on the Web site.

The campus community continues to learn each month of the people and events of the campus through Coastlines. This Web-based newsletter has honed its quality into a resourceful collection of current news. It also serves as a media archive because of its stories and images. Coastlines now goes beyond the employee base to all retirees, several donor groups and friends of the University.

Alumni Relations
Alumni Relations continues growing the alumni base for the University by active alumni engagement. Areas of achievement for this year included the following:

- Increased alumni participation by 282%
- Conducted 40 special events designed to build and strengthen relationships with alumni
- Increased Islander Shrimp Boil attendance by going to five cities this year instead of four
- Introduced alumni focused Shrimp Boil Tailgates at Homecoming and in San Antonio/UTSA
- Increased alumni engagement having 613 alumni registered on the Alumni Web site
- Increased affinity program revenue by 23.4%
- Developing strategic plan to engage more alumni per nationwide best practices

Advancement Services
As of April 16, 2008, Advancement Services has processed 657 more gifts than during this same time last year, for a total of 7,558 gifts. We processed more than 580 data requests/reports, and in addition to our usual annual workload, this year we also processed data for special events related to the University’s 60th anniversary.

Following the transition of new leadership, Advancement Services is now functioning with a full and well-trained staff, including a new Advancement Services Coordinator who recently completed training on the Raiser’s Edge database software. This year, we added a number of enhancements that will further our ability to meet the rising demands on our time and resources, including:

Document Scanning System – The University purchased a new document imaging system, Laserfische, and Advancement Services is the first phase of implementing the new document scanning system.

Enhanced Prospect Research – The TAMU-CC Foundation has purchased Lexis/Nexis for a one year subscription. The Foundation has also purchased Wealth Screening of our database from Wealth Engine. Advancement Services will be developing a new process of updating information from both sources into the RE database.
Stewardship Task Changes – The Assistant VP of Development has assigned a committee to revamp the stewardship tasks, $1,000 and above. The committee will meet this summer, June 2008.

Planned Giving Module – Funds were available this fiscal year to purchase a planned giving module for RE. This module will help us manage wills/bequests we hope to receive during the capital campaign.

As of April 16, 2008, we have identified 30,090 solicitable alumni for inclusion in our database. This represents a 3.64% increase from the 29,032 we were able to identify in FY07. Our staff also strengthened the reliability of our database. As of April 16, 2008, we had 27,142 with good addresses, compared with 25,797 in FY07 (a 5.21% increase); 18,516 with good phone numbers, compared with 21,349 in FY07 (a decrease of 13.27%, due partly to increased integrity of the data gathered and partly to the prevalent use of cell phones, which are not as easy to access); 6,120 with good email addresses, compared with 5,108 in FY07 (a 19.81% increase).

Also as of April 16, 2008, our database had confirmed 4,239 parents with good addresses, compared with 3,288 in FY07 (a 28.92% increase); 3,167 with good phone numbers, compared with 2,953 in FY07 (a 7.25% increase); 2,406 with good email addresses, compared with 1,262 in FY07 (a very encouraging 90.65% increase).

Conclusion
The primary focus for Institutional Advancement in FY08 continues to be a successful capital campaign. Our final report from Alexander Martin Haas & Partners will be our blueprint for moving forward on the fundraising front. We will also continue to be actively engaged with the progress on the recent South Guth Park land acquisition and promotion of the idea that the University’s growth has a positive impact on the community. Our outreach with the community will continue as well with our relationship with the World Affairs Council of South Texas to increase our international presence and our work with the oil and gas business to garner support for an engineering program.

After overcoming a few setbacks with the house on Ennis Joslin, we now look forward to moving into an entirely new structure when the Woo Sung Lee Alumni and Welcome Center completes construction before year-end. Throughout the year, we will launch new initiatives to build our alumni base and to broaden our interactions with alumni and former students.

With a new Assistant VP for Development in place, we are putting renewed effort in reaching out to donors for a greater commitment than previously made to include bringing alumni who have given to annual funds up the development pyramid to special and major gifts. We will also be targeting retired staff and faculty to engage them in life income gift possibilities. Our focus for the remainder of the year will be to galvanize our development officers and our campus community to work harder than ever before to ensure a successful capital campaign.

As in years past, we effectively conduct all the fundraising and marketing efforts of schools the size of A&M College Station, UT Austin, Texas State, and Texas Tech, but with one-eighth the staff and budget. Given that, we do remarkably well with what we have. We expect to continue to surpass our limitation and do our part to bring greater recognition and broader appeal to our University.