

Organizational Profile

Organizational Environment

The Office of Institutional Advancement at Western New Mexico University (WNMU) was established in 2006 to promote WNMU's educational opportunities, to enhance the University's image, to connect with alumni, community, businesses and global partners, and to develop initiatives for raising private monies to support WNMU's mission. Educational opportunities provided through Institutional Advancement (IA) include the Western Institute of Lifelong Learning (WILL) and its Leadership Academy, and Economic Development courses and workshops offered through the Small Business Development Center (SBDC) at WNMU. Services to alumni include hosting of periodic chapter meetings (both regionally and nationally), twice-yearly publication of the *WNMU Alumni Bulletin*, availability of the new WNMU Alumni Social Network, special events (such as Homecoming and the annual Great Race) and ongoing awards and recognitions for our outstanding graduates. Services to the community include facilities usage, program/event sponsorship, leadership involvement in service organizations and workforce coalitions, small business advising, facilitation services, and a variety of open forums for ongoing dialog between "Town and Gown." A partnership recently established with the Centro de Enseñanza Técnica y Superior (CETYS) has taken our Basic Economic Development Course across the border to Mexico: WNMU is the only U.S. university that is accredited by the International Economic Development Center to teach this week-long course in Mexico. Another economic development initiative, the International Business Accelerator (IBA) is the only program that provides advisory assistance to small businesses here and abroad. The NAFTA Institute, also a part of WNMU's Institutional Advancement division, is the largest international trade conference with 650 attendees and 300 companies doing business at this year's session. Finally, fundraising is central to Institutional Advancement's role of supporting the University's Mission; since the office was established two years ago, the Vice President for Institutional Advancement (VPIA) raised over \$1 million to establish seed money for IA, annual gifts to support the capital campaign and endowed scholarships and chairs.

Western New Mexico University, founded in Silver City, New Mexico in 1893 as a teachers' college, serves both as a regional university and a community college, offering a spectrum of educational opportunities ranging from masters degrees to English as a Second Language (ESL) and general education development (GED) classes. Teacher education continues to be preeminent at WNMU, and many of our alumni are educators and coaches around the country. Geographic isolation, small size, low student-to-teacher ratios, and the university's ongoing commitment to continuous quality improvement work together to create an organizational culture that values individual input and achievement. Institutional Advancement's purpose is to build strong, lasting relationships with the alumni, students, employees, donors, businesses and communities that we serve. IA maximizes on the limited but valuable resources available in the WNMU alumni, staff, students, faculty, administration and Board of Regents (BOR) by involving all stakeholders in IA activities. The wife of the University President is a permanent volunteer in the IA office; BOR members host alumni chapter meetings and participate in IA strategic planning; faculty and staff assist with fundraising events such as the 2008 Expressive Arts Scholarship Art Auction; and family members of IA staff are regularly recruited to assist in University Fridays, Homecoming, and other promotional activities. This 'small community' culture supports the institutional mission and vision:

Western New Mexico University serves the multi-cultural populations of New Mexico, other states and other nations as a comprehensive university with an additional community college role. While research and public service are important undertakings of the institution, teaching and learning are preeminent at WNMU. We are a University that believes in the promise of every student, and together we work to create an educational community of diverse backgrounds, perspectives and talents that instill the values and develops the knowledge and skills necessary to prepare our students for the challenges of a changing world.

The WNMU Vision is to be recognized as a leader among peer institutions as evidenced by measurable success in meeting the education, research and service needs of the populations we serve.

Furthermore, all Institutional Advancement activities support WNMU Values:

Commitment to Students – at WNMU we exhibit this by ensuring that we

- ❖ Put students first as we teach, prepare, and celebrate student success.
- ❖ Provide appropriate students services to support students needs and success
- ❖ Create learning opportunities that enable students to succeed in a competitive work environment while generating a thirst for lifelong learning and exhibiting ethical behaviors
- ❖ View each and every student contact as an opportunity to add value and build relationships

Diversity – at WNMU we exhibit this by making a commitment to

- ❖ Expanding our community and worldview and promoting better understanding and appreciation of all peoples, cultures, religions, economic classes, abilities, and lifestyles.
- ❖ Learning with and from people whose backgrounds and assumptions may differ from our own
- ❖ Practicing fairness and equity for all people in whatever we do
- ❖ Providing an open, flexible, and participative learning and working environment
- ❖ Valuing each person for his/her distinctive skills, experiences, and perspectives and recognizing that a diverse workforce and student body are assets to WNMU

Flexibility – at WNMU we exhibit this by

- ❖ Responding positively and resourcefully to changing circumstances
- ❖ Treating every situation with a positive, “can do” attitude
- ❖ Anticipating and welcoming constructive change
- ❖ Responding effectively to the different needs or circumstances of our students, work colleagues, and communities
- ❖ Reviewing existing policies, procedures, curricula, programs, and teaching methods for current relevance and appropriateness
- ❖ Encouraging the capacity for rapid change throughout the institution
- ❖ Building the capacity to create new work systems, simplify processes, and identify ways to build collaborative relationships among departments/units

Integrity – at WNMU we demonstrate this through

- ❖ Engaging in and embracing full disclosure

- ❖ Ensuring transparency within the organization and our classrooms by being open, honest, consistent, impartial, and direct in all our dealings and decisions
- ❖ Being accountable to students, stakeholders, partners, and employees for commitments, results, and quality of effort and for the efficient and effective use of resources
- ❖ Acting responsibly, accountably, and ethically and taking responsibility for our actions and words.
- ❖ Giving appropriate credit for the work of others and not taking credit for others' contributions
- ❖ Doing the right thing even when no one is looking
- ❖ Maintaining appropriate confidentiality
- ❖ Communicating only what we know and not representing opinions, theories, speculation, or rumors as fact

Open Interaction with Community – at WNMU we exhibit this by welcoming opportunities to

- ❖ Meet, communicate, collaborate, and partner with the communities we serve
- ❖ Collaborate with, and for the betterment of, the communities in which our students, employees, and their families live and work
- ❖ Build an informed community where there is broad participation, healthy debate, and multiple channels for communication
- ❖ Create an environment that welcomes people to the campus and that generates involvement by university students and employees in the communities where they learn and work
- ❖ Partnership with community members and groups on issues of mutual concern
- ❖ Build town and gown relationships in order to identify imaginative outreach and collaboration opportunities

Preeminence of Teaching and Learning – at WNMU we exhibit this by providing

- ❖ Innovative and relevant curricula, instructional methods, developmental experiences, scholarship, creative activities, and professional/public service
- ❖ Tools for lifelong learning for students, employees, and the community.
- ❖ Opportunities for personal and professional growth beyond current boundaries
- ❖ An environment that encourages innovation, dialogue, critical and creative thinking, and an open exchange of ideas
- ❖ Curricular and co-curricular learning experiences that involve others in significant and meaningful ways

Pursuit of Excellence – at WNMU we exhibit this by expecting

- ❖ Continuous improvement in the delivery of relevant services to our students, our employees, and the communities we serve
- ❖ All faculty, staff, and students to rise above self-imposed limits
- ❖ Constructive self-evaluation, self-improvement, and personal excellence
- ❖ The highest standards in all that we do
- ❖ Effective use of data and information to inform our efforts, serve as a basis for high performance, and support accountability in our activities and desired outcomes
- ❖ Transparency within the organization
- ❖ Use of evaluation and improvement cycles, research and development, ideas and input from faculty, staff, students, and other stakeholders to identify “best practices”

Respect – at WNMU we exhibit this by

- ❖ Treating each person with the same dignity, civility, and fairness that we expect for ourselves
- ❖ Creating a workplace where the talents and contributions of each employee is included, recognized, and valued
- ❖ Honoring our commitments to others including meeting deadlines
- ❖ Working to communicate effectively by encouraging active listening to understand better the concerns of internal and external constituents
- ❖ Creating a work environment that is free of threats of retaliation and where each person feels comfortable to make suggestions or register concerns
- ❖ Creating learning and work environments that value the talents and contributions of all learners and employees

The IA Office is staffed by the Vice President for Institutional Advancement, the Special Projects Coordinator, four part-time contract employees (one for Special Projects and three for the Call Center), two full-time contract employees (Marketing and Public Information) the Director of the Small Business Development Center, the SBDC Administrative Assistant, the SBDC Business Advisor, the Quality Initiatives Coordinator, the Director of Alumni Affairs, a part-time Student Assistant and a part-time Volunteer. While the University Ombudsperson is not directly affiliated with the IA Office, this individual works closely with the Vice President for Institutional Advancement in facilitation of strategic planning and meetings with various customer groups. Of the IA workforce, 71% are female, 28% are Hispanic and 7% are African American. 21% hold advanced degrees, 64% have baccalaureate degrees and 100% have attended college. The IA Office is not represented by a collective bargaining unit but must comply, as does the entire university, with OSHA and AA/EEO requirements. Permanent full-time and part-time employees (53% of the 15-person IA workforce) are eligible for full WNMU benefits, which include paid leave and holidays, health insurance, and tuition waivers.

The Director of Alumni Affairs is housed in an office in Hunter Hall; Institutional Advancement staff, contract employees, and volunteers are housed in 6 offices and a conference room (for the Call Center) in the Global Resource Center. All permanent staff and three of the four contract employees have workstations and telephones; all but two offices have desktop color printers and two offices have FAX machines. The IA Office shares a Konica 3135 photocopier. Technologies used in IA include Microsoft Access for the Alumni data base and Prospect Research Online (PRO), a subscription-based service designed for non-profit organizations to identify and qualify individual, corporate and foundation funding sources. The IA Office also subscribes to the online Obituary Registry service.

As a subunit of Western New Mexico University, the Office of Institutional Advancement operates under the general regulation of our institutional accrediting body, the Higher Learning Commission of the North Central Association of Colleges, through the Academic Quality Improvement Program (AQIP). WNMU reports to the State Auditor for New Mexico 4-year public institutions, and is compliant with NCAA, Title IV, OSHA and EEOC regulations. The VPIA, a Certified Economic Developer (CEcD), is active in the Council for the Advancement and Support of Education (CASE), an international organization that provides member organizations with access to industry networking and best practices. She is also a member of the International Economic Development Council (IEDC), where she serves on the International Committee, and she is currently the Chair of a New Mexico 1st Implementation Team on Rural

Economic Development. The WNMU SBDC is certified and audited by the New Mexico Small Business Development Center (NMSBDC), which in turn operates under the guidelines of the national Small Business Administration (SBA). The NMSBDC annually audits WNMU SBDC processes and results.

The VPIA reports to the President of Western New Mexico University and participates in regularly scheduled meetings of the Senior Leadership Team and President’s Cabinet. Senior leadership at the University level includes all four vice presidents (Institutional Advancement, Academic Affairs, Business Affairs and Student Affairs). President’s Cabinet includes the University President, all VPs and Deans; it also includes Student, Faculty and Staff Senate Presidents, the Quality Coordinator and the Director of Information Technology (IT). The VPIA meets quarterly with the University’s governance board, the WNMU Board of Regents, and continuously involves this group in strategic and event planning for Institutional Advancement.

Key customer/stakeholder segments include donors, The WNMU Foundation, alumni, current students (future alumni), faculty, staff, Board of Regents, community members, education and business partners in the region and in Mexico, and prospective students. Parents of existing and future students, children of graduates, and regional high schools and two-year community colleges also constitute key customer/stakeholder groups.

Institutional Advancement has on contract the Garrity Group Public Relations firm; through this arrangement, Marketing and Public Information services are provided to WNMU. Both the Marketing and Public Information personnel (1 FTE each) are housed in an office in the Global Resource Center. These contract employees, as well as the Garrity Group, report to the VPIA and are central to the University’s branding, marketing and media outlet efforts. They are also the means by which organizational identity and some communications are disseminated both internally and externally. Area business partners and regional (including Mexico) educational partners provide both promotional opportunities and venues for delivery of WNMU courses and programs. The Institutional Advancement Office and its partners work together to sell WNMU’s innovations, such as online programs. This relationship is maintained primarily through face-to-face interactions, telephone calls and emails.

CUSTOMER / STAKEHOLDER GROUP	EXPECTATIONS
Donors (Individual, Corporate, Grant) & WNMU Foundation	<ul style="list-style-type: none"> - Adherence to designated use of funding - Fiscal responsibility - Regular fiscal reporting, as required - Recognition / Acknowledgement
Alumni	<ul style="list-style-type: none"> - Connection to WNMU community - Value from WNMU education - Recognition - Contact with former classmates & faculty - Regularly sustained contact with Alumni Affairs (e.g. receiving <i>Alumni Bulletin</i>)
Current Students (Future Alumni)	<ul style="list-style-type: none"> - Value of WNMU education - Connection to WNMU community - Access to faculty & staff - Safe environment (on campus and online) - Contact with classmates & faculty after graduation - Recognition
Faculty & Staff	<ul style="list-style-type: none"> - Recognition - Positive internal & external image of WNMU - Recruitment & retention of students

	<ul style="list-style-type: none"> - Connection to WNMU community - Financial support for academic needs - Value of WNMU as an employer
WNMU Board of Regents	<ul style="list-style-type: none"> - Adherence to policies & procedures - Recruitment & retention of students - Excellence in Leadership - Ongoing success of WNMU
Community Members	<ul style="list-style-type: none"> - Access to WNMU senior leadership - Presence & support of WNMU in the community - Availability of WNMU facilities - Employment opportunities - Educational opportunities
Education / Business Partners	<ul style="list-style-type: none"> - Beneficial relationship with WNMU - Educational / networking opportunities (e.g. NAFTA Institute; SBDC business advising services & educational programs)
Other Community Colleges & Universities	<ul style="list-style-type: none"> - Competitive educational programs in multiple delivery formats - Excellent <i>and</i> affordable education - Easy access to services - Access to faculty & staff - Connection to WNMU community
<i>Figure P.1b-1 Requirements & Expectations of Customer/Stakeholder Groups</i>	

Organizational Challenges

The Office of Institutional Advancement competes with regional colleges and universities in larger, more accessible communities for recruitment and retention (which ultimately yield alumni and potential donors); however, WNMU’s geographic isolation has traditionally proven to be an advantage, as well. Over 50% of WNMU alumni are from Grant County and/or have remained in Grant County, and multi-generation alumni families are common. The explosive growth of online learning could erode this advantage, though, as more students seek and complete fully online degrees in programs not offered by WNMU.

Another strategic challenge for Institutional Advancement is the current economic crisis, which could negatively impact donor gifting to the University. In cases where a WNMU graduate went on to matriculate from another school, competition for alumni donations increases all the more. From these vantage points, potentially every other college or university in the country could be a competitor, but particularly those in the Southwest and those that offer fully accredited online programs.

The principal factors that determine success relative to our competitors are: increased identification of WNMU as “A University Worth Discovering;” increased contact with alumni, community members and regional businesses (including Mexico); growing current WNMU students as future alumni; and increased giving to the WNMU Foundation. The hiring of a public relations firm in 2007 and contracting of Marketing and Public Information personnel in 2008; completion of a draft *WNMU Marketing Plan* earlier this year; new partnerships with economic developers and educators in Mexico; administration of an independent public opinion survey in June, 2008; and implementation of an IA Call Center all create new opportunities for innovation, collaboration, and increased competitiveness in the region.

While no national standards exist for institutional advancement in general, comparative data, trends and best practices are widely shared through CASE conferences and committees, and

through its monthly publication, *Currents*. With respect to the Small Business Development component of the WNMU IA Office, standards are readily available through the NMSBDC Network. The WNMU SBDC files quarterly reports to the NMSBDC and sets its annual targets with assistance from this agency.

Since March, 2007, IA has been involved in a formal strategic planning process (SPP) that is aligned with the WNMU SPP. Key strategic challenges and advantages were identified through an initial SWOT exercise of the Institutional Advancement Committee (IAC) and used as the basis for planning (see Figure 2). Sustainability is central to the IA SPP, thus an obvious challenge – funding for the Institutional Advancement Office itself. This was made a priority, resulting in a seed money campaign called “The Group of Twenty.” With organizational sustainability always in mind, IA recently used Group of Twenty money to purchase the PRO funding source online service.

As an AQIP institution, WNMU has performance improvement embedded in all systems, including Institutional Advancement. Environmental scans such as the recent public opinion survey, and ongoing new graduate and alumni surveys, provide IA with the data needed to fine-tune strategic planning and change processes and programs, as needed. Organizational learning and performance improvement are what prompted creation of the IA Office and what continue to drive what we do for our alumni, our community, our students, and our employees.

Category 1 – Leadership

Senior leadership consists of the WNMU Board of Regents (BOR), the University President, and the Vice President for Institutional Advancement. Senior leaders participate in strategic planning: the BOR and President at least once a year, and the VPIA quarterly with the IAC. The VPIA attends all meetings of the BOR, President’s Cabinet, and the Vice Presidents, facilitating frequent and ongoing communication at the highest level of the organization. The President and BOR value and support Institutional Advancement and avail themselves whenever possible to host or participate in events for alumni and the community. This participation and visibility of senior leadership addresses the strategies of fostering community (external) support of IA, and improving faculty/staff (internal) appreciation of and involvement in IA activities. The current economic crisis has created an urgent need for more aggressive fundraising: senior leadership supported this need by allocating funds to create and staff an IA Call Center in October, 2008, and to invest in technologies that will allow us to reach more potential donors. Leadership of the WNMU IA Office is entirely focused on the future, with continuous quality improvement as the blueprint for how we work both as an institution and as a subunit.

The Vice President for Institutional Advancement is a nationally-recognized economic developer and a certified personnel consultant with an extensive background in executive recruitment. She is a member of the International Women’s Forum and its state chapter, the New Mexico Women’s Forum; she also sits on the NM Governor’s Mansion Foundation Board and serves on the International Economic Development Board. Her strong servant-leadership skills have cultivated a high degree of loyalty amongst her staff. High performance is encouraged and sustained by example and enthusiasm on her part. The VPIA is accessible in person, by telephone, and by email; and in spite of her demanding professional obligations and frequent travel, she is always available to her staff and colleagues. Her past experience as the Director of the Silver City Chamber of Commerce puts her in a unique position with respect to

understanding the needs of our local community, and she demands of her staff the ethical behavior and good citizenship that she models every day.

Communication between senior leaders and IA staff is sustained, informal and collegial. As a small institution, WNMU staff and volunteers enjoy more familiarity with and access to leadership than is experienced in larger universities. The President and VPIA encourage high performance in two ways: by acknowledging it in others and demonstrating it themselves. The combination of excellence by example, positive feedback, and access to leadership has sustained a high performance work ethic in IA.

The Institutional Advancement Office governs itself formally within the framework of WNMU and BOR policies, and informally through regular communications. Every Monday morning begins with a calendar meeting in which all staff members report their scheduled activities for the coming week. The VPIA has final authority on all decisions and expenditures, but exercises this with input from her staff. Long-term activities and action plans are generated by the IAC, which is also the strategic planning group for this WNMU subunit. Membership on the IAC includes WNMU employees from across campus:

- Vice President for Institutional Advancement
- Special Projects Coordinator, SBDC
- Special Projects Coordinator, IA
- Quality Initiatives Coordinator
- Director, Alumni Affairs
- Executive Director, WNMU Foundation
- Director, Admissions
- Director, Office of Multicultural Affairs/Student Activities (MASA)
- Director, Information Technology (IT)
- Associate Professor, Biology (Faculty Representative)
- Assistant Director, Athletics
- Marketing Contractor
- Public Information Contractor
- Dean, Extended University
- Public Relations Firm Representative
- Student Representative(s)
- Ombudsperson (Facilitator)
- IA Volunteer (University President's Spouse)

WNMU and its subunits comply with Affirmative Action/Equal Employment Opportunity laws and the organization maintains a "Zero Tolerance" policy of violations. Service to the community is embedded in the organizational Mission (in part as a "community" college) and in our Value of "open interaction with the community." IA staff serve on the State Workforce Development Board, Rotary, Grant County Cattle Growers, Optimists' Club, and the Chamber of Commerce. Two trained and experienced facilitators in the IA Office have availed their services, free of charge, to local service organizations. The Director of the SBDC is the 2008 recipient of the NMSBDC "State Director of the Year" for her service to this community. The IA Office created and sponsored a number of forums in which senior leadership and community members meet to discuss and act upon community needs. One such venue is the

ongoing “Town and Gown” meetings, initially organized by the VPIA, that are co-chaired by the Mayor of Silver City and the University President.

Category 2 – Strategic Planning

In March of 2007, the Institutional Advancement Committee met for the first time to focus specifically on strategic planning. Employing the model already in use by the University, the Committee first did an environmental scan through a Strengths/Weaknesses/Opportunities/Threats (SWOT) exercise. Challenges and strategies were identified and prioritized from these, and appropriate IAC members were assigned ownership. The first such exercise was completed by July, 2007, and an update review session will be held each November to ensure currency and to monitor plan completion.

Strategy	Response to SWOT	Responsible	Start Date
Build Alumni Chapter in: a) Tucson b) Las Cruces c) El Paso d) Albuquerque e) Deming f) Grant County	O	Alumni Affairs Director; VPIA	a) Spring 08 b) Spring 08 c) Spring 08 d) Spring 08 e) Spring 08 f) Spring 08
Utilize & nurture current students on “giving back”	W	MASA Director; Admissions Director; Alumni Affairs	Spring 08
Foster faculty appreciation for VISION, increase their involvement & support of IA activities	W,O,T	Quality Coordinator; Special Projects Coordinators; IA Volunteer	2/15/08
Revamp Homecoming to educate, entertain, build relationships	S,O	MASA Director; Alumni Affairs Director; Special Projects Coordinators	Spring 08
Update Dream Book – establish market for at least one success story	S, O	VPIA; Special Projects Coordinators	On-going
Maintain an accurate, growing Alumni data base	S,W,O	Alumni Affairs Director; Special Projects Coordinators; Call Center Staff	On-going
Establish critical contact list	O,S	VPIA; Special Projects Coordinators; Alumni Affairs Director	January 08
Expand & enhance community vehicles to support IA vision	O,S	Alumni Affairs Director, Special Projects Coordinators	Spring 08

Foster staff appreciation for vision, increase involvement & support of IA activities	W,O,T	Quality Coordinator; MASA Director; IA Volunteer	November 07
Enhance & build consistent image of WNMU in western NM communities	SWOT	VPIA; Public Relations Firm; Marketing/Public Information Contract Employees; IAC	November 07
Establish Silver City as a college town	W	VPIA; Public Relations Firm; Marketing/Public Information Contract Employees; IAC	On-going
Establishing themes for sports weekends & enhancing existing sports-related events	O,W	Assistant Athletic Director; MASA Director; Special Projects Coordinator IA	Spring 08; launch Fall 08

Figure 2. Institutional Advancement Strategic Planning Action Grid

The IAC revisits the Action Planning Grid on a quarterly basis for progress, relevancy, gaps, and alignment with the WNMU SPP. Results to date are presented in Category 7. The next quarterly meeting and annual review of the strategic plan and the strategic planning process is scheduled for November 13th, 2008.

When the IA Office was established in late 2006, the alumni database contained over 12,000 entries. *WNMU Alumni Bulletin* mailings generated from the database yielded approximately 89% undeliverable returns, meaning that less than 2,000 entries contained accurate contact information. This strategic challenge drives several others identified by the team, including building alumni chapters, establishing a critical contact (donor) list, and enhancing WNMU’s image overall. As a result, a key performance measure for IA strategic planning is to create a viable alumni database through re-establishing contact with thousands of graduates. This was an ongoing but under-resourced effort since October of 2006; however, with the advent of an IA Call Center that was established first using students, alumni and other friends of WNMU as volunteers, and then staffed with three contract employees, several critical strategies are being addressed. WNMU is re-establishing contact with alumni as database contact information is updated. Event attendance is increasing as bulletins and other mailings (including email notices) for alumni activities are received. Alumni knowledge (particularly of other alumni) and needs are being used to locate other graduates, plan events and reconnect graduates with WNMU and each other. Potential donors are being identified and contacted, yielding support for WNMU’s Capital Campaign, endowed scholarships, and IA needs. Results in these key areas are favorable and are presented in Figure 7.6.

Category 3 - Customer and Market Focus

In 2006, an AQIP Action Project Team was formed at WNMU to focus on marketing with many of the IA staff, including the VPIA, as members. Two years later, a subset of this team, the Marketing Plan WIN Team, in collaboration with the Garrity Public Relations Group, completed the final, “deliverable” product from this long-term effort. The *WNMU Marketing Communications Plan and Controls* was created through a process of gathering institutional

marketing practices and outputs (brochures, newsletters, promotional materials and budgets); identifying and prioritizing our customers, markets, strategic advantages and strategic challenges; then administering a public opinion survey of Grant County. The Plan outlines marketing “facts,” goals, objectives and strategies, with targets, that align with the WNMU strategic plan. For example:

Campaign Goal: Increase opinions among Grant County residents that WNMU is economically Beneficial to Grant County (Strategy 7.1).

- **Objective:** Increase opinions by 5% (to 76%) over a two year of people in Grant County who feel WNMU is beneficial to the economy.
 - **Strategy:** Position success stories about WNMU’s economic impact and SBDC to Grant County residents.
 - **Tactic:** Community event partnerships
 - **Tactic:** Town & Gown
 - **Tactic:** SBDC awareness
 - **Tactic:** News releases
 - **Tactic:** Opposing Editorials

“Strategy 7.1” is from the WNMU Strategic Plan (“Fully inform stakeholders”) with which this particular Marketing campaign goal is aligned. It is also integrated into the IA Strategic Planning Action Item Grid under “Enhance & build consistent image of WNMU in western NM communities.”

Along with campaign goals and objectives, the *WNMU Marketing Communications Plan and Controls* also includes an executive summary, situation analysis, story angles/approaches, a timeline for campaign implementation, a “keep it, change it, ditch it” promotional material review (based on the WIN Team’s collection); media marketing strategies for the website and all traditional media outlets in the area (with current contact information for the latter); and marketing recommendations for the University, Admissions, and for Institutional Advancement:

Advancement

Western New Mexico University’s University-wide and Admissions-related marketing need to be combined into one accountable function through the Advancement department. Using the University of New Mexico – and other major universities in the country – as a model for the general organization plan for marketing, the internal and external marketing responsibilities should fall under the supervision of the Vice President for Institutional Advancement. If there is to be a Marketing Director named, that individual should work directly, along with the Director of Communications, under the Vice President. All admissions-related, recruitment, internal and external communications, advertising, collateral and anything carrying the brand of the University needs to fall under one department under the Vice President of Advancement. Failure to do so will result in lack of accountability and coordination, causing lack of efficiencies when communicating WNMU’s mission, vision and values. Along this same line of thinking, the WNMU marketing budget also needs to be moved from the supervision of the Admissions Department and placed under the Vice President of

Institutional Advancement. Special budget allocations for admissions marketing should come from this budget.

The Institutional Advancement Office, as the new owner of marketing processes for the University, incorporates Marketing Plan Objectives in its strategic planning process and will revise both the IA SP and the Marketing Plan as environmental and other changes take place.

IA uses several other methods to determine customer needs and requirements. The SBDC component of IA offers workshops throughout the year on topics selected largely by clients and attendees of previous events. Information is gathered formally through a post-workshop evaluation and informally through conversations with SBDC clients and local business owners. The WNMU Alumni Board provides feedback on needs and expectations, as well as relevance of alumni events and programs. This feedback is recorded in formal meeting minutes of the Board. Alumni surveys have been administered over the years but response rate was adversely affected by the inaccurate database contact information; a viable database will render this process more useful in the future.

As a small institution in a small community, much feedback is delivered through informal channels. IA staff routinely receive emails and telephone calls from customers who have ideas, concerns, and questions. These are followed through on a case-by-case basis. Assistance with problem solving is central to building relationships with alumni, local businesses, community members and employees. Issues that can't be resolved quickly by IA staff are referred to the appropriate University vice-president for action.

In a more formal process, issues are forwarded to the Quality Coordinator for creation of a Western Improvement Network (WIN) team. WIN teams bring process owners and customers together to close gaps and improve processes. The Marketing Plan WIN Team, for example, created the *WNMU Marketing Communications Plan and Controls* that is now being used as the framework for institutional advancement. Other examples include the Bookstore WIN Team (active from December 2008 to July, 2008), which was formed in conjunction with a University partner, Follett, to gather and act upon faculty and student concerns about Bookstore services; and the Online Processes WIN Team (active from January 2008 to present), which is focusing on improving fully online admissions, registration, financial aid and tuition payment services to students, particularly for a growing segment of graduate students based in Mexico.

Community, student, employee and new graduate surveys are other tools used to gather feedback on customer satisfaction/dissatisfaction. These assist the University in general and the Institutional Advancement Office in particular in determining what is working, what isn't, and what needs attention. Feedback from surveys, public forums such as "Town and Gown," the "Contact Us" link on the WNMU Alumni Affairs web page, and a general "open door" policy practiced by senior leaders keeps the IA Office current with what our customers want, how the market is changing, and what we as an institution need to move forward. For example, a recent public opinion of Grant County residents conducted by an independent polling company revealed that, in general, residents earning less than \$60,000 per year view WNMU more favorably than do those whose salaries exceed that amount. This feedback is useful to IA as we develop marketing strategies and products, such as WILL and, as we design new initiatives, to target the population with salaries over \$60,000.

Category 4 – Measurement, Analysis, and Knowledge Management

The IAC, as owner of both the WNMU Marketing Plan and the IA strategic planning process, is the clearing house for Institutional Advancement performance measurement, review, analysis and improvement. Assessment is conducted through quarterly updating and review of the Strategic Planning Action Item Grid (see Figure 2) and, for the purposes of fundraising, through the University Capital Campaign Scorecard. Funding needs collected by Institutional Advancement and compiled in the WNMU Capital Campaign “Dream Book” drive fundraising efforts. The Scorecard provides an evaluation tool for measuring progress and, if necessary, addressing shifting priorities. IA does not have in place a formal process for measurement; this will be the focus of the next Strategic Planning meeting, scheduled for November 13th, 2008.

Central to IA’s knowledge management and building is the Alumni Database. Since January 2007 the number of viable contacts has more than doubled (see Figure 7.5); furthermore, detailed alumni information such as profession, employer, and activities while at WNMU are being gathered to fine-tune targeted events and fundraising efforts. Recent acquisition of the PRO fundraising service will provide the IA Office with another tool with which to build knowledge assets. Aside from granting access to directories and websites for finding lost alumni, PRO’s subscription services provide access to charitable giving histories for individuals and corporations, as well as donors to other institutions.

Institutional Advancement’s access to University data, hardware and software is provided by the WNMU IT Department, the Director of which serves on the IAC. IT maintains a general use drive on which any employee can create folders for back-up and/or sharing. One such folder is called the “Resource Room.” Created for a 2007 AQIP quality check-up and maintained by the Quality Coordinator, it contains all minutes and presentations from IA meetings and strategic planning sessions, as well as IA and SBDC newsletters. The Resource Room is also available to the public from the WNMU AQIP web page.

The WNMU Office of Data Analysis & Research provides collection and analysis of institutional information that is reviewed regularly for data integrity by a team that includes the Director of Data Analysis & Research, the Registrar and the institutional transcript evaluator. Examples of data relevant to Institutional Advancement efforts are those related to student recruitment demographics (for targeting emerging and shrinking markets), and web site activity (for upgrading the WNMU web pages). External data will soon be stored and managed by a WNMU-led initiative called the Statistical Research Center, a public service project recently approved by the Association of Commerce & Industry, Industrial Developers Executive Association, The Alliance, NMEDC, and the NM 1st Town Hall Implementation Team on Rural and Urban Communities. The Statistical Research Center will serve as a repository for 7 counties in southwestern New Mexico, providing data for Chambers of Commerce, the Council of Governments, and other entities. The target for launching this website is January 2010.

Finally, access to information for all stakeholders is facilitated by the WNMU web site, which will be undergoing a complete re-design in the next year. The IA Office will oversee this process and work closely with the contractor to ensure compliance with the University’s style guidelines, which were also set this year by the IAC. Content managers for IA, Alumni Affairs, and SBDC interior web pages have already been selected from the staff. With a web site user-friendly to all of our customers, easy to navigate, and current, the IA Office can better keep alumni, students, employees, partners and the community – both here and abroad – informed and connected.

Category 5 – Workforce Focus

With the exception of the four contract employees, all permanent, full-time Institutional Advancement staff are under the WNMU Human Resources compensation and benefits program. WNMU's benefits package is a major tool in recruiting and retaining its workforce. An environment that supports professional development, personal growth, creativity, recognition, celebration, and humor is what sustains high performance in the IA Office. Teamwork and collaboration are expected of this staff. The Board of Regents, the University President and the VPIA are supportive of staff needs and generous with praise for work well done; these qualities have created engagement that takes the IA staff out into the community, representing WNMU, well beyond the standard 40-hour work week.

High performance is also sustained through workforce access to professional development opportunities. The IA office maintains a small library of leadership and motivational resources. Attendance at relevant state and national conferences is encouraged and fully funded by the University. Other professional development opportunities made available to IA staff include:

- Commercial/SBDC Workshops
- WNMU Annual All-University Assessment Convocation
- Quality Improvement (AQIP & WIN) Team and Governance Committee Work
- Quality New Mexico Conference, Trainings, and other Quality-based workshops
- Malcolm Baldrige National Quality Award Examiner Service
- Team Facilitation, Quality Tools
- Foundations of Excellence® Program
- IT Trainings
- Leadership Academy
- Defensive Driving Course
- AA/EEO Hiring Committee Orientations
- Diversity Training
- Webinars

Workforce capability within the IA staff is driven largely by identifying and utilizing personal skill sets that fit tasks, rather than by adhering to rigid job descriptions. Workforce capacity is a constant challenge, and the limited human resources with which the office works necessitates the “wearing of many hats.” This is both a challenge and an advantage, as there is always room for IA staff to grow professionally and add work experience that wouldn't necessarily be available to them in a more structured context. For example, the recent departure of the University grant writer played into the IA office's decision to purchase our PRO subscription. Several IA staff members will be conducting grant research and – ultimately – writing, thus adding these important skills to their resumes.

Western New Mexico University maintains a safe and secure work environment in which the Institutional Advancement Office operates. The WNMU Crisis Response Plan provides a structure for action in the event of catastrophic injury, severe weather, fire, violent/criminal behavior, hostage/terrorism incidents, gas leaks, chemical spills, bomb threats and campus evacuation. WNMU Campus Police are on duty or on call 24/7. The *Staff Handbook* includes policies that address safety and worker's compensation, disciplinary action, and grievance

procedures. The Ombuds Office assists employees with conflict resolution and the grievance process: this service is confidential and available to students, faculty and staff.

Category 6 – Process Management

Core competencies that are strategic advantages for the WNMU Institutional Advancement Office include:

- Flexibility (Core Value)
- Open Interaction with the Community (Core Value)
- Integrity (Core Value)
- Pursuit of Excellence (Core Value)
- People-Oriented

Flexibility is an organizational asset that allows IA staff to create and improve work systems with limited resources. WNMU's creation of the IA Division in 2006, expansion of the Economic Development Course into Mexico, and implementation of the *WNMU Marketing Communication Plan and Controls* (see Category 3) are products of vision, agility, and a commitment to service that crosses an international border, supporting our mission of service to the region and other nations.

In the past two years, WNMU's presence in the community has increased visibly. Open forums, such as "Town and Gown" meetings, and "Main Street Walk-Arounds" conducted by the Vice Presidents in area towns have helped to bring the University to regional communities. Area businesses support WNMU by purchasing a WNMU flag and flying it on Fridays: this effort has doubled as a fund-raiser and a promotional opportunity. All of these programs were initiated by the IA Office.

Another facet of public service is responsible custodianship of gifts made to WNMU; integrity is central to IA's dealings with donors and potential donors. All IA staff members who have access to the alumni database must sign a confidentiality agreement. The database is not made available on the University's network and is moved from one workstation to another, when necessary, via a portable drive, never by email. Gifts to the University are used precisely as the donor wishes, and anonymity is respected when a gift is made with that stipulation.

Pursuit of excellence is the basis of our institutional accreditation process and, subsequently, the model for all subunits, including IA, to follow. Three employees are long time volunteers with Quality New Mexico, and two are Baldrige examiners. Continuous quality improvement drives strategic planning and other key processes in Institutional Advancement.

Key processes in IA include: strategic planning (see Category 2), production of public relations materials, alumni database development, events, and economic development activities.

Alumni database development begins with a call list generated from the database or from WNMU annuals. A script is provided to the call center workers, and a series of questions are asked of the alumnus contacted. If the telephone number from the database is not correct, this is noted and searches using PRO and other online tools are undertaken. Once information is captured, it is immediately keyed in to the database. The process is structured but flexible enough to accommodate any number of potential roadblocks or opportunities, including missing or incorrect information, mistaken identity (a reality with common names), and information on other alums that can be gleaned from a contact. Call center employees are discreet, professional and open to alumni feedback that is often captured during these conversations. Overall, this is a

community that is appreciative of our efforts to reconnect. Alumni database development is key to organizational sustainability as it is the primary source of donor contact information.

Because event planning is ongoing and central to our operations, the VPIA recently charged the IAC with developing a formal checklist to improve this complicated process. The tool we created is detailed enough to use in any situation, from an awards banquet to a dedication ceremony. The wrap-up component includes elements for learning and improving:

Wrap-Up

- Thank you to all involved
- Credit to all involved
- Compile feedback and LEARN from it
- Follow-up report – share with all stakeholders
- Update website
- Inventory of supplies used (for next time)
- Follow-up celebration & “lessons learned” meeting
- Set date for next event and start over!

Economic development activities, such as one-day workshops and the week-long basic course, are planned using a similar checklist format. Educational programs are evaluated at the end and this feedback is entered into the NMSBDC Network website. Advising through the SBDC also follows a flexible (depending on needs) plan that walks the client through the steps necessary for defining products and services and for starting a new business, including:

- Business plan
- Cash flow projections
- Personal financial statement
- Lease or sales contract for business site
- 3-year income tax history
- Partnership agreement or corporate by-laws
- Resume of principals & key management
- Other pertinent information
- 4 C’s: Character/Credit; Capital; Cash flow/Capacity; Collateral

Again, integrity is central to the business advising process. The SBDC annually nominates a regional “Small Business of the Year” for recognition at the state meeting in Santa Fe. This process supports positive and open interaction with businesses in our community and is mutually beneficial in public relations terms.

An overarching core competency in Institutional Advancement is a people-oriented staff. From engaging and honoring donors, to upholding the University’s Mission of service to the community through helping small business owners and reconnecting with alumni, to developing a marketing plan, all processes and their successful outcomes are driven by our ability to cultivate and sustain good relationships with our customers.

Process improvement is driven by the Plan Do Study Act (PDSA) model employed by WNMU in general. As a result, all of the IA Office’s plans, processes and procedures are continuously open to revision. This is true of the Marketing Plan, the IA Strategic Plan, checklists developed and procedures captured for training of future IA staff. Even the smallest

recorded processes, such as how to enter alumni into the social network, have been revised and improved in the short lifespan of the IA Office.

Category 7 – Results

In the spring of 2007, the VPIA, along with the Quality Coordinator and a member of the WNMU Foundation staff, visited the University of Arizona’s Institutional Development Department to observe this organization’s processes and practices. What we took away from that visit was the model – however scaled down for WNMU - of a Call Center, which has since been established in IA. Because WNMU’s formal fundraising and advancement efforts are less than three years old, benchmarking with our traditional peers, Eastern New Mexico University and Highlands University, has been challenging. The *WNMU Marketing Communications Plan and Controls* identifies targets for IA; however, useful comparisons will have to be obtained from colleges and universities less than twenty-five years old in order to be useful to the WNMU Office of Institutional Advancement.

Key product and customer-focused results are achieved through strategic planning, improved data collection and knowledge management, and by workforce capacity building in Institutional Advancement. Figure 7.6 highlights these results. A rapidly growing market segment for WNMU in general and IA in particular is Mexico. NAFTA Institute attendance has grown from 310 in 2006, to 490 in 2007, to 950 in 2008. New partnerships with CETYS, the International Economic Development Council, and certified economic developers across the border this year open up many more opportunities for IA to reach out to this enormous market segment. The Grant County Public Opinion Survey conducted earlier this year revealed that residents earning in excess of \$60,000 per year have a less favorable view of WNMU than do those earning less. IA is committed to changing this perception through its increasing community involvement and delivery of programs and services that benefit Grant County residents. One such program that is currently in the making and will be held at the spring, 2009 WNMU Great Race is the “One-Day University,” which will showcase our best faculty members as they lecture on areas of interest to WNMU alumni, WILL participants, and community members.

Membership in the Western Institute for Lifelong Learning, and number of courses offered, has also increased since the program’s inception. The number of courses offered has more than doubled every year, with 13 in 2006, 44 in 2007, and 92 in 2008. WILL, an all-volunteer organization, also taps the expertise of area citizens to teach continuing education courses ranging from in focus from art and music to budget and finance.



Figure 7.1 WILL Classes Offered 2006 – 2008

The primary function of the Vice President for Institutional Advancement is fundraising. Numerous fundraising projects have been launched since the 2006 restructuring of WNMU to include an IA office, including:

- The Ernie Mills Recognition & Scholarship (over \$7,000)
- The Tommy Foy & Murray Ryan Recognition (over \$18,000)
- The Dorothy Bumann Blalock Endowed Professorship (over \$400,000)

While the WNMU Foundation maintains the scorecard for the ongoing WNMU Capital Campaign and dozens of endowed scholarships, it is the VPIA who approaches donors and funding agencies, and finds creative ways to raise money and increase visibility for the University. In 2006, the VPIA raised approximately \$60,000 in IA seed money from the Group of Twenty (alumni and friends of the University). In 2006, several fundraising initiatives were started, including the Brancheau Photo Gallery, through which alumni, staff, students or community members pay \$150 to sponsor installation of athletic team photographs in the walls of the Physical Education complex. Funds raised by the VPIA have increased nearly fourfold over the past three years, from the initial \$60,000 in 2006 to over \$200,000 in 2007 and nearly \$800,000 in 2008.

In the two years since Institutional Advancement was established, the following positions have been added or upgraded:

- Director of Alumni Affairs (upgraded from .5 FTE to 1.0 FTE)
- Special Projects IA (.5 FTE)
- Marketing (1.0 FTE)
- Call Center Supervisor (.75 FTE)
- Call Center Staff (Two .75 FTE)

Creating a viable database of alumni and donors is an ongoing priority for IA. Call Center staffing, first with volunteers and more recently with contract staff, has more than doubled the number of corrected entries since 2006. This enables more effective communication with alumni and potential doors.

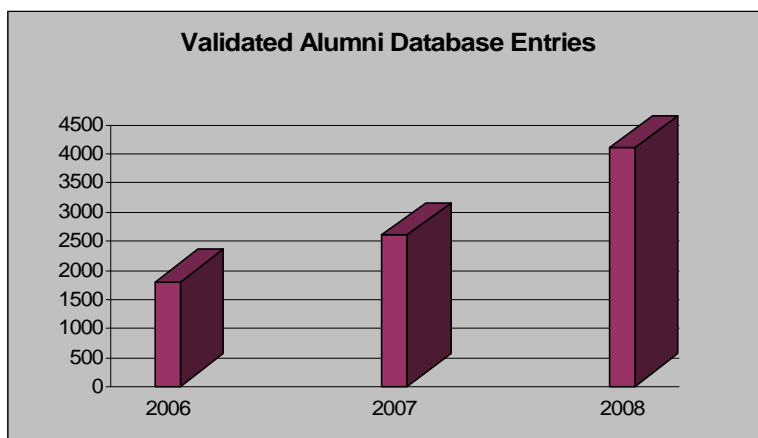


Figure 7.5 Validated Alumni Database Entries

Strategic Planning has been central to Institutional Advancement’s operations since the office was established. The IA Strategic Planning Action Item Grid, developed after a SWOT analysis in the spring of 2007 (see Figure 2), is revisited quarterly and results are reported by IAC members assigned ownership of these strategies. Current results are as follows:

Strategy	Response to SWOT	Status
Build Alumni Chapter in: a) Tucson b) Las Cruces c) El Paso d) Albuquerque e) Deming f) Grant County	O	a) Chapter last met December 2007 b) Chapter met 8/20/08 c) Chapter met 8/22/08 d) Chapter met 6/14/08, 7/5/2008; scheduled 11/15/2008 e) Meeting scheduled for January, 2009 f) Chapter met 2/9/08, 9/10/2008; 9/25/2008; 10/9/2008, 10/16/2008, 10/26/2008; scheduled 11/1/2008
Utilize & nurture current students on “giving back”	W	<ul style="list-style-type: none"> • <i>Alumni Bulletin</i> mailing list now includes juniors & seniors • Student volunteers used to contact Alumni • Student representatives recruited for IAC and for Web site & Marketing Plan development
Foster faculty appreciation for VISION, increase their involvement & support of IA activities	W,O,T	<ul style="list-style-type: none"> • Faculty representation on IAC • VPIA slide show presentation to Faculty General Assembly Spring 2008 • Development of Capital Campaign Dream Book
Revamp Homecoming to educate, entertain, build relationships	S,O	<ul style="list-style-type: none"> • Homecoming 2008 to include “Alumni University” featuring outstanding faculty • Athlete alums honored for anniversary years (2007 honored athletes from 1947, 57, 67, etc.) Yielded positive feedback and strong attendance; will be repeated in 2008 and onward • Events for 2008 re-structured based on alumni & student feedback and lessons learned from 2007
Update Dream Book – establish market for at least one success story	S, O	<ul style="list-style-type: none"> • VPIA successfully negotiated \$5,000 annual endowment to support Maintenance Dept. facilities upkeep, with a commitment to additional funding in the future; Donor honored by WNMU and Physical Plant Director summer, 2008, with significant press coverage
Maintain an accurate, growing Alumni data base	S,W,O	<ul style="list-style-type: none"> • Call Center established and staffed Fall 2008 • Viable contacts more than tripled since spring 2007
Establish critical contact list	O,S	<ul style="list-style-type: none"> • Donors being coded in database for easy sorting by gift type • Alumni Chapter Heads being identified • Alumni attendance at events recorded and captured in database

Expand & enhance community vehicles to support IA vision	O,S	<ul style="list-style-type: none"> • “Town and Gown” • IA-sponsored Community Covenant with U.S. Army to honor armed forces troops serving abroad October, 2008 • Expanded Grant County Alumni Chapter meetings & activities • SBDC outreach to Mexico • IA took lead in forming partnership with WNMU, Town of Silver City, Chamber of Commerce, and Silver City Museum to create Arts & Cultural District
Foster staff appreciation for vision, increase involvement & support of IA activities	W,O,T	<ul style="list-style-type: none"> • Staff Employee of the Month presentation of personalized WNMU polo shirt from IA, starting fall 2007 • VPIA slide show presentation to Staff General Assembly Spring 2008 • Development of Capital Campaign Dream Book
Enhance & build consistent image of WNMU in western NM communities	SWOT	<ul style="list-style-type: none"> • Development and implementation of WNMU Marketing Plan • Hiring of Garrity Group Public Relations Firm • Grant County community survey • Marketing & Public Information contract staff added to IA Office • Constant, informative, positive press coverage for WNMU • WNMU style guidelines developed and adhered to • “University Fridays” downtown business WNMU flag display
Establish Silver City as a college town	W	<ul style="list-style-type: none"> • Marketing & Public Information contract staff added to IA Office • Constant, informative, positive press coverage for WNMU • WNMU style guidelines developed and adhered to “University Fridays” downtown business WNMU flag display
Establishing themes for sports weekends & enhancing existing sports-related events	O,W	<ul style="list-style-type: none"> • Assistant Athletic Director serves on IAC • Charity fund raising basketball game featuring WNMU alumni athletes held spring 2008

Figure 7.6 Strategic Planning Results