

# **Administrative and Educational Support Report**

**Development & Endowment Support**

**Annual Action Plan  
Annual Assessment Report**

**June 2006 – May 2007**



**Annual Action Plan: June 1, 2006–May 31, 2007**

**Unit:** Development and Endowment Support

**UTPA Mission:** The University of Texas-Pan American (UTPA) serves the higher education needs of a rapidly growing, international, multicultural population in the South Texas Region. The University preserves, transmits and creates knowledge to serve the cultural, civic, and economic advancement of the region and the state. The University provides students advanced instruction in academic programs offered through innovative delivery systems that lead to professional certification, and baccalaureate, master’s and doctoral degrees. Through teaching, research, creative activity and public service, UTPA prepares students for lifelong learning and leadership roles in the state, nation and world community.

**Division:** External Affairs      **Unit Head:** Lydia Aleman

**Unit Mission:** The Office of Development and Endowment Support supports the educational mission of The University of Texas-Pan American and the Division of External Affairs by cultivating, sustaining and maximizing University Endowments and development support. The office will maintain excellent records on University, Foundation and Alumni Endowments; monitor endowment compliance; continuing to set up endowments when needed; and providing a smooth transition from endowment accounts to UTPA accounts for the disbursement of scholarships and faculty supplements.

**University Goal:** Optimize institutional effectiveness and efficiency consistent with high quality organizational standards.

**Division Objective:** Improve information data management systems.

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY07
Increase the efficiency and use of the Raiser’s Edge software system, a donor based gift processing system. (1)	Increase staff meetings focused on addressing issues/concerns with Raiser’s Edge software system and data entry by development staff.	90% of all Raiser’s Edge meeting agenda items will be resolved within two months.	Meeting agenda items are resolved within 2 months. Evaluation will be done a quarterly basis for all outstanding agenda items for quick resolution.	None.
	Enter data in a timely manner for reporting to	At least 90% of all gifts are entered into the Raiser’s	Weekly follow-up with accountant on outstanding	None.

Annual Action Plan June 1, 2006–May 31, 2007

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY07
	management.	Edge System within one week of receipt.	issues with at least 90% resolved within one week; 100% resolved within two weeks as indicated by the gift log.	
Increase and enhance staff's job knowledge through cross functional training. (2)	Re-evaluate job descriptions to ensure accuracy.	Revise job descriptions to adequately reflect day to day activities.	Revised job descriptions are approved by Director and serves as baseline for future job development.	
	Cross-train development staff for increased job knowledge.	Cross trained development staff is able to take over job function when staff is out.	At least 75% of all development gift processing and accounts payable are processed within 2 weeks of receipt as evidenced by the gift log and accounts payable log that is reviewed on a monthly basis by the accountant.	None.



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**Division Objective:** Improve information data management systems.

Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
Increase the efficiency and use of the Raiser’s Edge software system, a donor based gift processing system. (1)	90% of all Raiser’s Edge meeting agenda items will be resolved within two months.	Meeting agenda items are resolved within 2 months. Evaluation will be done a quarterly basis for all outstanding agenda items for quick resolution.	Gifts requiring research were tracked on a worksheet and reported to the director. As a result, gifts were resolved within two months and gift requiring resolution was reviewed by the director	Monthly reports were generated and disseminated to the development staff; gift items requiring resolution received an increased level of attention on a more frequent basis.

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Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
			weekly.	
	At least 90% of all gifts are entered into the Raiser's Edge System within one week of receipt.	Weekly follow-up with accountant on outstanding issues with at least 90% resolved within one week; 100% resolved within two weeks as indicated by the gift log.	Most gifts were entered timely; the thank you letters were reviewed for timely input. Those gifts not entered weekly were reviewed by the director to determine the cause of the delay and corrective action was taken.	Receipts to donor were sent independent of "thank you" letters. This ensured that receipts were entered and sent to donor timely.
Increase and enhance staff's job knowledge through cross functional training. (2)	Revise job descriptions to adequately reflect day to day activities.	Revised job descriptions are approved by Director and serves as baseline for future job development.	Job Descriptions were updated. Further evaluation is needed by the Director.	The results showed that a need for streamlining job roles and responsibilities is necessary to ensure that there is no overlapping of duties and that a better level of understanding of processes is needed to increase operational efficiencies. Continued work is being preformed on this objective.
	Cross trained development staff is able to take over job function when staff is out.	At least 75% of all development gift processing and accounts payable are processed within 2 weeks of receipt as evidenced by the gift log and accounts payable log that is reviewed on a monthly basis by the accountant.	Weekly training session on disbursements, endowments, receipting was preformed in order to increase the level of knowledge to the staff in difference areas. The sessions were held in the months of January and February. An accounts payable system was set up to track status of gifts and invoices. The information was tracked	The results are used to ensure staff had an adequate understanding of each other's job roles and responsibilities in order to reach timely resolution on outstanding items.

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Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
			and at least 75% was processed within 2 weeks. The outstanding items were reviewed by Accountant any issues were addressed with the Director.	