

Administrative and Educational Support Report

Development and Endowment Support

Annual Action Plan
Annual Assessment Report

June 2007 – May 2008



Annual Action Plan: June 1, 2007–May 31, 2008

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 FY08
Implement the scanning of endowment documents to allow access to the development units.	Increase awareness of endowment information to ensure all relevant information is readily available to the development staff to improve cultivation and stewardship efforts.	100% of endowment gift agreements and relevant endowment information will be scanned and made available to development staff.	Track the number of scanned endowment files and monitor that all newly created endowment are scanned.	None

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Implement a new stewardship effort to thank donors using “digital thank you emails.”	Create a digital email thanking donors for their support to the university. The digital email will include university and student success stories along with a link to the university website.	The number of e-mails thank you notices sent to donors will increase by 25%	Track the number of digital emails sent to donors in the donor data base system and reporting this number at the monthly development meetings.	None
Increase the efficiency and use of Raiser’s Edge software system, a donor based gift processing system.	Increase staff meetings focused on addressing issues/concerns with Raiser’s Edge software system and data entry by development staff.	80% of Raiser’s Edge meeting agenda items will e resolved within one month.	Meeting agenda items are resolved within one month. Unresolved items will be evaluated on a quarterly basis for quick resolution.	None

This Unit is No Longer in Existence