Section 1: Executive Summary (Budget Highlights) for 2016-17

- **Budget Highlights**

  - **Total STATE budget for Advancement**

  **Development (Leadership Giving, Advancement Services, Finance)**

<table>
<thead>
<tr>
<th>Category</th>
<th>2015-16</th>
<th>Cut</th>
<th>2016-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>S&amp;E</td>
<td>$34,300</td>
<td>4%</td>
<td>$32,928</td>
</tr>
<tr>
<td>Travel</td>
<td>$55,000</td>
<td>4%</td>
<td>$52,800</td>
</tr>
<tr>
<td>Contractual Services</td>
<td>$112,000</td>
<td>4%</td>
<td>$107,520</td>
</tr>
<tr>
<td>Equipment</td>
<td>$10,000</td>
<td>4%</td>
<td>$9,600</td>
</tr>
<tr>
<td>Temp Service/Students</td>
<td>$28,500</td>
<td>10%</td>
<td>$25,650</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>$239,800</td>
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<td>$228,498</td>
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  **Alumni (Engagement, Association)**

<table>
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<th>Cut</th>
<th>2016-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>S&amp;E</td>
<td>$34,000</td>
<td>4%</td>
<td>$32,640</td>
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<tr>
<td>Travel</td>
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<td>$7,680</td>
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<td>Contractual Services</td>
<td>$5,000</td>
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<td>$4,800</td>
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<tr>
<td>Equipment</td>
<td>$0</td>
<td>--</td>
<td>$0</td>
</tr>
<tr>
<td>Temp Service/Students</td>
<td>$0</td>
<td>--</td>
<td>$0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$47,000</td>
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<td>$45,120</td>
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  **Annual Fund (F/S, Emeriti)**

<table>
<thead>
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<th>2016-17</th>
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</thead>
<tbody>
<tr>
<td>S&amp;E</td>
<td>$24,000</td>
<td>4%</td>
<td>$23,040</td>
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<tr>
<td>Travel</td>
<td>$1,000</td>
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<td>$960</td>
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<tr>
<td>Contractual Services</td>
<td>$15,000</td>
<td>4%</td>
<td>$14,400</td>
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<tr>
<td>Equipment</td>
<td>$0</td>
<td>--</td>
<td>$0</td>
</tr>
<tr>
<td>Temp Service/Students</td>
<td>$28,500</td>
<td>10%</td>
<td>$25,650</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>$68,500</td>
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<td>$64,050</td>
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**Totals (of three sections above)**

<table>
<thead>
<tr>
<th>Category</th>
<th>2015-16</th>
<th>Cut</th>
<th>2016-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>S&amp;E</td>
<td>$92,300</td>
<td>4%</td>
<td>$88,608</td>
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<tr>
<td>Travel</td>
<td>$64,000</td>
<td>4%</td>
<td>$61,440</td>
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<td>Contractual Services</td>
<td>$132,000</td>
<td>4%</td>
<td>$126,720</td>
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<tr>
<td>Equipment</td>
<td>$10,000</td>
<td>4%</td>
<td>$9,600</td>
</tr>
<tr>
<td>Temp Service/Students</td>
<td>$57,000</td>
<td>10%</td>
<td>$51,300</td>
</tr>
<tr>
<td><strong>TOTAL budgets</strong></td>
<td>$358,000</td>
<td></td>
<td>$337,668</td>
</tr>
<tr>
<td><strong>Budget savings</strong></td>
<td></td>
<td></td>
<td>$20,332</td>
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</table>
o **Assumptions underlying the budget**

- We are out of Campaign and will not be getting any additional state money this year.
- Additional funds last several years:
  - $80K per year for Campaign Director (not replaced)
  - $50K per year for Development Writer (not replaced)
  - $30K per year for Annual Fund assistant (runs out July 31; won’t be replaced)
  - $18K per year for Phonathon automation (shutting down phonathon after this spring)
  - $208K for various Campaign support (Consultant, travel, events)
- Expectations remain HIGH for Advancement

o **List of all major spending allocations (including surplus)**

- Recently filled open Gift Officer position through internal search that found Nicole Dumbleton (Associate Director of Annual Fund); will need to back fill Nicole’s position
- Scholarship Coordinator funded through temp service; would like to move to state line
- Potential of shared line with College Communications (have no designated Advancement Communication person)
- Continue part-time Gift Officer position (former VP)
- Graduway (Foundation expense)
- EverTrue/Giving Tree software (state rollover)
- Calling Program (Foundation expense)
- Increased travel expenses (second year of new President; more engagement through Calling program; more Alumni partnerships internally and externally)

o **Fee increases**

- Not applicable

o **Surplus**

- See previous

• **Issues for 2016-17**

  o **Potential redeployment of resources**

    - See previous

  o **Critical divisional needs**

    - More gift officers/feet on the street
    - Gift officers in Schools (start with Business)

• **BRC Action Requests for 2016-17**

  o **Recommendation/endorsement of any new fees, capital expenditures, policy changes, etc.**

    - None

• **Other; none**

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Section 2: Budget information with details Supplemental Budget Information
(Provided by Crystal)
Section 3: 2016-17 Priorities as they relate to:

- **The Division and its office**
  - Support program
  - Private dollars (individual, corporate, foundation) to enhance the educational mission of the College

- **The College Strategic Plan**
  - Campaign and Alumni Engagement in previous SP
  - Part of current process
  - Know that issues like community engagement, international, research, scholarship will remain high on our priority list
  - Gala in December
  - Summer Undergraduate Research plans

- **Areas of Strategic Investment**
  - Graduway: Engagement, Departments, Career Services
  - EverTrue/Giving Tree: Tool for Giving Officers, Annual Fund
  - Calling Program: using students to connect with Alumni, Emeriti, Corporate
  - Academic Works: Continual; growth and improvement

- **Assessment**
  - Campaign last year
  - Alumni Engagement and score this year

Section 4: Use of Resources

- **Faculty and Staff FTE**
  - Current level
    - At 19.5 in 2016-17; was at high of 23 during Campaign
    - Major losses are on the Development side
    - Solid staffing levels in terms of back room operations (Advancement Services, Finance) and Alumni Engagement
  - Future needs (hiring plans for 2016-17)
    - Need more Gift Officers! Next Campaign ...
  - Position management (goals for numbers of vacancies or salary savings, as appropriate)
    - Eliminating Phonathon as we know it; numbers plummeting
    - May go back to volunteer program (boards, F/S, BAWAFAS)
    - Get Scholarship Coordinator on a state line
    - Shared Communication position
    - Savings/losses are considerable
      - Rox/Mike (2.0) down to only 1.5
      - Not filling Campaign positions
      - Resourced scholarships (one staff to team of 4-5) impacts external
      - Loss of Gift Officers impacts liaison work with departments
      - Makes fiscal sense, does not allowe for continuity of program

- **Use of Priority Needs Funds**
  - Permanent: None
  - Temporary: None

- **State Balance Rollover – June 30, 2015**
  - $130,072

- **Divisional re-deployment or elimination of existing resources**
• Investment and Divestment priorities
  o See position management section
  o Gift officers in schools; strong need in 2017-18; Business?

• Expansion of existing activities
  o Campaign readiness
  o Support outcome of Strategic Planning process

Section 5: Other Budget or Resource Information, as appropriate

• Cross-divisional projects
  o All we do is cross-divisional!

• New budgetary modeling
  o Exploring

• Response to President’s Task Force initiatives
  o Cutting phonathon (ROI not there)
  o Cutting back on “party” events (nice to do, but not fiscally sound)
  o Sustainable practices for future
  o As set goals for next Campaign, what are major priorities (as opposed to only enhancers)

Section 6: Additional Supporting Materials