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Western Oregon UNIVERSITY

# WOU STRATEGIC BUDGET PROPOSAL FOR INSTITUTIONAL PRIORITIES

## I. PROPOSAL OVERVIEW

| | | |
|---|---|---|
| Title<br>Formation of Community Relations Division | | |
| Department<br>New | Requestor<br>Erin McDonough | |
| Requestor Email<br>mcdonoughe@wou.edu | Requestor Phone<br>89120 | Request Date<br>11/22/17 |

## II. TIMEFRAME

| | | |
|---|---|---|
| **Proposed Dates** | Start 04/01/18 | End |

## III. PROPOSAL SUMMARY

*Make your summary **concise** and compelling. Avoid jargon and acronyms. A limit of 100 words is recommended.*

By incorporating the departments of Strategic Communications & Marketing and University Advancement/WOU Foundation under single leadership the budget savings may be redeployed to improve capacity and function. This proposal also includes growth to meet the changing needs of the university and create the ability to support the strategic plan.

## IV. PROPOSAL SCOPE

Describe the proposal and the expected outcomes if approved. Additional space available on the next page.

This proposal requests the following:
* The elimination (in name) of two Executive Director positions in favor of one Vice President position.
* The addition of an Enrollment Marketing Specialist and Community Marketing Coordinator in MarCom with associated one-time capital needs, increased s&s and a new marketing initiatives budget.
* The addition of a Gift Officer in UA/Foundation with associated one-time capital and increased s&s.
* Funding for an internal communication audit.
* A one-time increase to MarCom's S&S for capacity building initiatives.
* Funding for a Wealth Engine screening.

Details:
Community Marketing Coordinator will provide a leadership role on campus to support efforts to improve town-gown relationships, expand our visibility into Salem and around Oregon with a specific effort on increasing overall brand visibility. This position would also provide much needed event support for university wide efforts across campus -- for instance building openings, ground breakings, anniversary's, specialty events like the Jensen Lectureship Series, etc. This position would be responsible for taking advantage of university membership in Chambers, Rotarys, Travel Salem, etc. This proposal scope includes a reasonable increase

***Proposal Scope continued***

in the S&S budget for MarCom to implement new initiatives.

Enrollment Marketing Specialist would coordinate marketing efforts for all enrollment categories including new freshman, transfer, international, and retention. They would work closely with Admissions, Graduate Programs and International Education & Development to execute plans. By creating a unified plan, the university would be able to more effectively utilize marketing resources and take advantage of economies of scale. Utilizing a thoughtful, strategic approach will allow the university to be more nimble and take advantage of opportunities for marketing and advertising. Most importantly, the implementation of tracking and data to determine effectiveness and data based decisions will be possible. This proposal scope includes a large marketing budget to implement new programs as well as S&S and moving of marketing funds from various areas.

MarCom S&S Increase: Potential one-time expenses include:
* Hiring a PR agency to evaluate and provide strategic direction for earned media initiatives.
* Hiring a photographer. Current marketing trends are photo heavy, including our refreshed website, our current staff does not have the time or expertise to meet the wide variety of needs. There is a short term need to increase our pool of photos -- this is a resource that is needed every 2-3 years.
* Increase overtime or hire contract graphic design to meet demand. With an increased campus wide effort to broaden our visibility, it is important that we can meet all graphic design needs in a timely manner.
* Hire digital designer/videographer for specific digital needs to meet our expanding web and social media presence

Gift Officer: A full-time fundraising staff member will be assigned the cultivation and solicitation of approx. 250 prospects. In addition they will be responsible for identifying 25-40 new prospects annually. They will be expected to actively make connections in the community in an effort to expand our reach and external funding for university priorities. This request also includes a modest S&S budget of $5,000 for travel.

Prior to embarking on a full comprehensive campaign, an evaluation and basic screening of your prospects is an important tool. This evaluation can help determine campaign goals, approaches and overall plan. Wealth Engine is an industry leader in this effort.

## V. STRATEGIC ALIGNMENT

Describe the proposal's linkage to the university Strategic Plan.

Community Marketing is key to no longer being the "best kept secret." This position would help fulfill the goals in III. Community Engagement. Specifically: 2., 2.6, 3., 3.1, and 3.2. Link to IV. Accountability: 3., 3.2, 3.4,

Enrollment Marketing is key to our long-term funding. Link to IV. Accountability. #3
Most importantly, this position will play a key role in:
V. Sustainability and Stewardship 1. Enhance financial sustainability through enrollment and fiscal strategies. Specifically 1.1 and 1.2. and 2.6 - Increase access to,m and education about, scholarship opportunities, particularly for students of color, immigrants, rural and socio-economically disadvantaged students.

Internal Communication Audit: The Strategic Plan (and accreditation) require a focus on accountability. The main goal of IV. Accountability highlights "Promote teamwork and transparency in budgeting, decision-making and the stewardship of resources." This is only accomplished with effective communication. By utilizing an outside agency we can effectively create a plan to meet the goals in IV, 4. Enhance and support campus communication systems. We would also argue that to accomplish all goals in the plan and sub-plans requires a more integrated and less compartmentalized approach.

MarCom S&S: Visibility, communication and enrollment are key to all areas of the Strategic Plan. Providing us additional flexible funds will allow us to meet the needs of campus.
MarCom's work directly impacts: I. Student Success, 4.2, II. Academic Excellence, 5.3, 5.4, III. Community Engagement, 2., 3., 4., IV. Accountability, 3., 4., V. Sustainability and Stewardship, 1.2

University Advancement: Increased fundraising and the addition of new revenue sources is mentioned multiple times throughout the strategic plan. Most directly it is addressed in Sustainability & Stewardship.
However, I would argue that much of the efforts put forth in the plan require funding, even if not directly mentioned. A dedicated staff member with fundraising expertise and experience is needed to support these efforts. Specific revenue generated via University Advancement is highlighted throughout the draft enrollment plan.
Areas of strategic alignment:
II. Academic Excellence #1, #2, #3, #5
III. Community Engagement #2
IV. Sustainability & Stewardship #1, #3
Also of note, adding staff capacity for fundraising will provide time for the VP to meet the objectives found in the University Goals; including, but not limited to, campaign planning.

## VI. ADDITIONAL INFORMATION

Please include the following: implementation plan, assessment plan and the plan to sunset proposal if assessed objectives are not met in the timeframe outlined.

We suggest leaving the University Advancement budget and Strategic Communications & Marketing Budget in separate indexes -- numbers listed on following pages divide the request in these two categories. 1st page = MarCom 2nd page = University Advancement
Numbers include are full dollar amounts and do not include current budgets available for reallocation.

This proposal takes into account the following assumptions:
1. An electronic catalog is implemented this year and is funded via UCS or the Registrar's budget.
2. TRI directly hires for their communications and marketing needs that relate to external contracts and grants. If the opportunity exists to transition that centrally, we would need to increase graphic design capacity.
3. Campaign planning will lead to a limited duration staffing and budget plan and is independent of this request.

Notes specific to requests:
Internal Communication Audit
This request is in response to and in support of a formal request made by Staff Senate. Recommendations from the audit would be evaluated during the next budget cycle. A note, the requested budget has not been verified. (If an agency was unavailable at this level, we would suggest a peer audit and use the budget for travel and accommodations.)

| **VII. BUDGET** Select all sources that will fund this proposal and complete form A (below) for each source. (Additional copies on pages 6-8.) | | | |
|---|---|---|---|
| Education & General ☑ | Grant ☐ | Self-Support Academic ☐ | Self-Support Non-Academic ☐ |

| **A. Funding Source** | Education & General ☑ | | Grant ☐ | Self-Support Academic ☐ | | Self-Support Non-Academic ☐ |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | 95,000.00 | 95,000.00 |
| **Benefits** | | | | | 63,000.00 | 63,000.00 |
| **Materials & Supplies** | | 40,000.00 | | | 10,000.00 | 15,000.00 |
| **Travel** | | | | | | |
| **Contracted Services** | | 25,000.00 | | | | |
| **Capital** | | 4,000.00 | | | | |
| **Other Operations** | | 240,000.00 | | | 100,000.00 | 150,000.00 |
| **TOTAL** | 0.00 | 309,000.00 | 0.00 | 0.00 | 268,000.00 | 323,000.00 |

| A. Funding Source | Education & General ✔ | Grant ☐ | Self-Support Academic ☐ | Self-Support Non-Academic ☐ | | |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | 10,000.00 | 64,000.00 | 64,000.00 |
| **Benefits** | | | | 7,250.00 | 35,000.00 | 35,000.00 |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | 2,000.00 | 5,000.00 | 5,000.00 |
| **Contracted Services** | | 7,500.00 | | | | |
| **Capital** | 1,500.00 | 1,500.00 | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 1,500.00 | 9,000.00 | 0.00 | 19,250.00 | 104,000.00 | 99,000.00 |

| **A. Funding Source** | Education & General ☐ | Grant ☐ | | Self-Support Academic ☐ | Self-Support Non-Academic ☐ | |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| **A. Funding Source** | Education & General ☐ | Grant ☐ | | Self-Support Academic ☐ | Self-Support Non-Academic ☐ | |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| VIII. PROPOSAL SIGNATURES | | |
|---|---|---|
| Department Head | Name | Signature |
| Division Head | Name | Signature |
| Vice President | Name Erin McDonough | Signature |

| IX. ACTION | | |
|---|---|---|
| **Recommended by UBC** | Yes ☐ No ☐ | Date |
| Comments: | | |
| **Recommended by President** | Yes ☐ No ☐ | Date |
| Comments: | | |
| **Final Approval** | Yes ☐ No ☐ | Date |
| Comments: | | |