

UIU Strategic Initiatives

Progress Summary (*note: Italic means in progress*) as of February 2011

1. Introduce policies and programs that create the seamless movement of students and faculty

(Aungst)

- State Department J-1 Program designation received in April 2008, allowing foreign nationals and exchange students from UIU campuses overseas to get temporary work and study visas to come to the United States.
- The CFO is now a member of the reconfigured AQIP Steering Committee (“ASC”). ASC realigning and integrating AQIP processes with strategic plan initiatives, based on systems appraisal feedback report from HLC. SI #1 will be the “pilot” case used to model how best to accomplish this integration.
- A lead implementation team (Aungst, Chown, Duffy, Frazier) has been formed to oversee the academic and administrative initiatives. *Several working groups with specific action plan objectives have begun work. Work in progress is reported monthly to the President’s cabinet*
 - Implemented a budget resource allocation model to consistently develop budgets across all modalities; *testing online voucher pilot system to purchase Fayette Campus textbooks; operational review of Peacock Connection underway; committee researching a university-wide document imaging system and managed print solution; plan to phase-out AE center enrollment form; developing a replacement system/process for our current centralized calling tree and create a decentralized call center for incoming calls.*
- AQIP action project on eCollege for CDE’s transition to web-based platform is complete for online modality. (SI 1.2.b)
 - *Features of the platform will enrich Center and Fayette Campus student learning experience with “high tech” enhancements for classroom based instruction.*
 - *CDE student account teams have completed training to better serve military-related programs and updates. (SI 1.2.c)*
 - *eCollege reporting improves efficiencies in financial aid disbursement (decreased to 5 days from 9+) and timely registration data; training continues by NACADA for CDE advising team. (SI 1.2.e)*
- *Implementation of systems, processes, and policies is in place to transform the UIU HK operations to similar, if not identical, to those at our domestic academic centers*
 - *Budget data conversion underway; plan to upgrade technology in alignment with AE awaiting approval.*
- Business majors are now aligned across the university.
- *Alignment of terms and registration for all modalities is in progress.*
 - CDE and NCR schedules in alignment with the Fayette campus beginning 09-10 academic year.

2. Challenge the curriculum & pedagogy to achieve the vision objective of “developing global citizens”

(Chown)

- Goal established to integrate multiple cultural learning perspectives into curriculum with faculty exchange program for Fayette Campus, and domestic/int'l centers; *program under way.*
 - Each term in the Hong Kong campus, one exchange faculty member conducts courses.
 - *Lead faculty member (psychology) hiring process is underway for Hong Kong center.*
- Comprehensive assessment of gen ed requirements is complete, evaluation process of outcomes in place via “The Tome”; *AQIP action project to align majors is underway; new AQIP action project to assess learning within the majors will be refined at May 2010 AQIP Strategy Forum. (SI 2.2.c)*

- LibArts passed resolution to include “global-ness” to enhance global mission. Anticipate meeting or exceeding market conditions/needs with new faculty hires, who bring personal and professional global-ness to the division. (SI 2.2.d)
 - *Courses in world history, art history, and communications are being added or updated for greater global content.*
- The International Business major began in fall 2008, with the hiring of a full-time International Business faculty member.
- *AQIP informal initiative team working on refining “global citizen” for use in assessment of majors and co-curricular activities.*

3. Comprehensive quality enhancement of the academic program

(Chown)

- Chief Academic Officer and Dean of Faculty in place (SI 3.2.e).
 - The formation CC/GCC provides unified cross-representation for curricular matters. AGCC reviews non-curricular policy, Facilities Committee tracks space/housing support (SI 3.2.b, SI 3.2.f).
 - *The Division of Mathematics and Science Restructuring Initiative is underway. Fayette Campus and AE stakeholders are developing process to coordinate information via adjunct liaisons. (3.2.f)*
 - *Integration of Project 1100 and Strategic Initiative 3 underway (SI 3.2a).*
 - *Specialized program review and outcome assessment to begin upon completion of “global citizen” refinement (SI 3.2.b).*
- *Academic Extension continues to integrate full-time faculty into centers and distance education programs (seven fulltime faculty currently, four positions to be filled).*
- New Liberal Arts Building-Exterior finishes have begun with stone and brick. Roofing is complete. The interior raised floor is complete with walls and ceilings being installed. The building is 62% complete and is on schedule to complete August 2010.
- Science renovation/expansion programmatic planning complete. *Ready for fund raising phase.*
- Funding secured for an endowed Honors Program.
- Resource allocation for maintaining student faculty ratio resulted in 19 net new faculty from spring 2008 to fall 2010.
- Division of Education (Teacher Education Program) successfully completed the state’s Institutional Review in spring 2010.
- Renovations to upgrade the capabilities of the Tutor Center were completed April, 2009.
- Design teams and working groups in place to align building/classroom technology with global citizen concept.
 - AE successfully completed eCollege conversion for online courses.
 - *Transition scheduled to support face-to-face courses on Fayette Campus for next academic year.*
 - SmarThinking in use as on-line tutoring for modalities.
 - Email transition allowing online adjunct faculty to new domain; *other adjunct faculty to follow.*
 - Online facilities management work order system in place at Fayette Campus; *under evaluation for use by AE.*

4. Contribute to the development of “global citizens” by providing co-curricular learning opportunities that complement the formal academic program

(Sanders)

- Development of the English as a Second Language (ESL) Program through the Division of Liberal Arts and Office of International Programs; approved through academic pipeline in February 2009. The ESL program is fully operational with the first cohort of students in Fall 2009. The program continues to develop various ways to engage students in English speaking opportunities. The second cohort for ESL commenced on January 11, 2010 with 20 students enrolled.
- Implemented a new cultural awareness plan that includes monthly International Food Dinners at the Fayette Campus, a revamped International Programs website and a quarterly International Programs Newsletter. Completion date was March 1, 2009.
- Athletics Department has developed internal policies to help enhance the enrollment of international students, including implementation of tryouts for ESL students and campus visit programs from international sports delegation (i.e. Japan). Established Fall 2009.
- A new task force for the Strategic Initiative 4: Co-Curricular (TF-SICC) was formed with positions representing all UIU modalities and operations; including student representation for Fayette and the Academic Extension. Established October 2009.
- Clubs formed on Malaysia campus: Psychology; Finance (selected as finalist competing in the Future Leadership Program – Business Challenge 2009, sponsored by Asian Wall Street Journal and the CIMB, one of the largest banks in Malaysia; club placed 5th in competition); Communication; Human Resource Management; Business Administration, Management, Marketing; Photography; Fayette House, CHEER Team.
- The TF-SICC is evaluating possibilities for international opportunities for adult learners and AE and IP are reviewing recent reports and studies on engagement of non-traditional learners in study abroad.
- Creation of the International Student Association (ISA) on campus in Fayette for international and domestic students interested in global understanding and communication. Created August 28, 2009.
- The Office of International Programs hosted Mr. Frank Garbutt, President of St. John’s College, Belize. Upper Iowa University and St. John’s College has signed a Memorandum of Understanding that will result in service learning and study abroad opportunities for students from both institutions. Established November 2009.
- Alternate Spring Break in Rancho Dolores, Belize through collaboration between IP and OSD occurred March 6 – 13, 2010. Twelve students and three staff members participated in the program, along with one student and one staff member from St. John’s College from Belize City. Projects completed include painting of school buildings, building partitions for the school building, improving out buildings and updating recreation areas. A blog on UIU’s website detailed preparation for, happenings during and feedback after the trip.
- OSD staff members developed skill sets/programming and timetable to allow students to achieve “global citizenship”. Established Fall 2009.
- The first annual International Education Week was celebrated at UIU from September 13-18, 2009. The week was highlighted by international dinners at the Fayette Campus Cafeteria, an international panel on “global citizenship” and the International Education Fair on September 18th. Completion September 18, 2009.

- The Lunar New Year was truly a global celebration at UIU. UIU students across the globe celebrated the Lunar New Year in Malaysia, Hong Kong and Fayette. From Ang Pow in Hong Kong, Pete the Peacock dressed in red in Malaysia & a celebration in the cafeteria in Fayette. The Lunar New Year was the featured UIU digital view on March 3, 2010.
- The Recreation Center is hosted various international sports event. Purpose of event is to expose all students of international sports; i.e., cricket, badminton, and ping pong. Established Fall 2009.
- A Martin Luther King Day celebration was organized by the Fayette House club in Subang Jaya, Malaysia January 18-22, 2010. The Fayette House club in addition to the rest of the student body was able to participate in various events celebrating and increasing awareness of Martin Luther King. On campus events included a short video presentation of the famous “I have a Dream” speech, distribution of informational flyers and a board to display student’s dreams. This event was held to raise awareness of Martin Luther King and the impact he had on American history/culture.
- Student Government has created and elected a position which is titled Academic Extension Officer. Establish Spring 2010.
- *Student Government has met with VP for AE, Dr. Duffy to receive information about the AE organizational structure. From that discussion, they are developing officer job descriptions and process of information flow that will address the needs of AE students to Student Government.*
- *The Office of Student Development in conjunction with Academic Extension has developed a Student Needs Assessment and surveyed AE students using their peacock and their privately held email addresses. Results were obtained – but poor response rate results dictate a resurvey. Timeline for completion – TBD.*
- *The Office of Student Development with the Office of International Programs, Athletics, AE and Food Service are working to develop a common programming effort that will increase departmental partnerships and broaden UIU’s “global citizen” programming efforts to all Students. Established Fall 2009 – on-going for 2010-11 with new food service provider.*
- *Student Union Building –Well drilling has been complete for the geothermal wells. The second floor framing and drywall have begun with the building being 30% complete to date. The project is on schedule to complete January 2011.*
- *Student Housing – The exterior finishes are 80% complete with stone and brick. The second and third floors have been painted with finish floors and ceilings being installed. The building is 67% complete and is on schedule to be complete August of 2010.*
- *Athletics has explored international travel in multiple sport programs. Most recently, a trip to Brazil with the Women’s basketball team. The golf programs have also explored the possibilities of team travel abroad.*
- *Athletics has many international student-athletes. The learning that can take place on a one-on-one basis with teammates, although sometimes difficult to measure, has a real impact on creating and maintaining global citizenship*
- *Research scheme to be developed to analyze the co-curricular needs of students at the domestic and international sites and define “global citizen” as it relates to the student development for all students. Projected completion date for research is May 1, 2011.*
- *Second Annual International Education week is scheduled for September 13th – 17th 2010. Week will feature cultural events, food, and the International Education Fair.*

5. Recommend policies and programs that strengthen the enrollment, financial aid, registration and advising services that contribute to the development of “global citizens”

(Khoury)

Infrastructure & Seamlessness:

- Assert leadership and systematic operations.
- Instill effective system of communicating with students from inquiry through enrollment.
- Ensure opportunities for job training, staff development and professional development.
- Ensure fiscal responsiveness and responsibility.

I. Lead Generation Purchase Consolidation:

- a. Five Year Partnership Contract with Monster – **Complete**

II. AACRAO Consulting is currently conducting a University-wide recruitment Operations Assessment

- a. Assess all frontline recruitment functions and information processing - **Complete**
 b. Asses Secondary recruitment functions and information processing – **Scheduled for January 2011**
 c. Report findings and recommendations – **Scheduled for February 2011**
 d. Implementation process based on report – **TBA**

III. Created Strategic Enrollment Management Steering Committee (EMSC):

- a. **Membership:** CAO, CFO, SVP AE, SVP IP, VP Adm & Fin Aid, Dean of Faculty, Registrar, Institutional Effectiveness, Dean of Students, Chief Diversity Officer.
- b. **Guiding Principles:**
- Everyone on campus should have a role: Understanding one’s role on the team is critical
 - Reporting lines don’t matter: Shared goals do!
 - There are no second class citizens: Joint accountability for success and/or failure of reaching goals
 - Develop a multi-year enrollment management plan with specific goals for new and continuing students
 - Staff and fund efforts to meet goals
 - Think long term: academic experience; experiential education; extra-curricular involvement; retention, career, and societal success
 - Focus on institutional core mission and goals
- c. **Charge:** Assess enrollment needs, policy development, and streamline recruitment and retention efforts.
- d. **Targeted Goals:**
- Improving conversion rates at inquiry, application, and enrollment stages
 - Increasing net tuition revenue
 - Achieving institutional goals for class composition
 - (quality, ethnic/geographic/ economic diversity)
 - Improving retention rates
 - Increase demand
 - Overall enrollment – budget vs. desired goal
 - Housing capacity
 - # of graduates to replace
 - Administrative capacity

- Advising support
- Historical student attrition
- First-year enrollment
- Financial aid budget
- # in Centers/Online etc
- Academic capacity
- Pricing/NTR/discount rate expectations
- e. **Enrollment Management Subcommittees:**
 - Retention Council Creation: Charge, Goals Objectives, membership – **In Progress**
 - Strategic Assessment of Current Retention Practices Template – **In Progress**
 - Recruitment Council Creation: Charge, Goals Objectives, membership – **TBD**

Diversity Initiatives:

- Ensure minority presence populations representative of our communities.
- Identify diverse students through complementary partnerships with all stakeholders.
- Provide and refer identified students with international or minority status to services.

I. Chief Diversity Officer Position Formalized

Retention Initiatives:

- Increase Retention, Persistence and Graduation Rates
- Better understand student subgroups/profiles and their retention/attrition behavior
- Create programs to support various sub-populations

I. Identified Actionable Items:

- a. Off campus Housing Policy Augmentation - TBD
- b. Student Orientations - TBD
- c. Advising- TBD
 1. Recruiter/advisor model
- d. Registration - TBD
 1. Specific online orientation
- e. Comprehensive Freshman first year UIU experience - TBD
- f. Comprehensive Second year UIU experience -TBD
- g. Strengthening Career Development - TBD
- h. University College – Undecided Student Designation - TBD

Policy Development & Institutionalization Process:

- Streamlining inconsistent policies
- Documenting and formalizing unwritten policies
- Creating needed policies to ensure seamlessness

I. Enrollment Management Policy Template Creation and Adoption – **Complete**

a) Policies Adopted:

- i. University wide Fall & Spring Census Data Reporting & Timeline
 - Chair: Melik Khoury
 - Policy Team: M. Heaton; D. Chown; J. Shepherd; L. Morris; C. Sanders; H. Streeter; K. Wenthold
 - Implementation Date: January 2011

- b) Policies in process
- i. University-Wide Freshman & Transfer Admissions Standards
 - Chair: Jobyna Johnson
 - Policy Team: Janet Shepherd; 2 AE Reps - TBA; 1 IP Rep –TBA; D. Chown
 - Due date to EMSC – Dec 13th, 2010
 - ii. University-Wide Graduate Admissions
 - Chair: Richard Patrick
 - Policy Team: Poppy, Armstrong, Haines, D. Chown, Behrens, Shepherd
 - Due date to EMSC – Dec 13th, 2010

Use Financial Incentives, Financial Assistance and Scholarships as Recruitment Complements

- Promote scholarship opportunities and collaborate on providing early estimators for new students.
- Explore newer methods of using incentives for admissions and student services.

I. Specifics TBD

6 Strengthen the IT infrastructure to provide security and the communications and administrative capacities for a seamless global campus

(Smid)

(Smid)

- **Storage/Server Virtualization**
 - Equipment needed to begin the server virtualization project was selected and purchased. The SAN (storage area network) unit and physical servers were implemented. The first virtual servers went into production. Completed 12/2008.
 - An additional SAN unit was installed in Garbee that communicates in real-time with the primary SAN unit located in AD. This provides a secondary site from which to run IT operations. Completed 03/ 2009.
 - Additional physical servers were purchased and installed; new virtual servers were created and several existing physical servers were successfully upgraded. Completed 08/2009.
 - The latest virtualization software was successfully installed which provides enhanced capabilities for utilization and performance monitoring. Completed 09/2009.
 - For data storage, additional hard drives were successfully installed to the existing SAN (storage area network) which allows for the creation of new virtual servers, data storage for end-users, and enhanced data backup capabilities. Completed 09/2009.
 - New database servers were added to create a cluster for high availability for Jenzabar EX. Completed 07/ 2010.
 - Server upgrades – additional memory and new operating systems have been successfully installed and upgraded. Completed 10/2010.
 - All existing and new production servers are now virtualized as a standard operating procedure. Reduces the number of physical servers needed, maintenance and operating costs and allows for faster server deployment and the ability to deploy multiple server technologies on a standard platform. Ongoing.
- **Fiber Optic Network**
 - A new fiber optic network was designed and approved to overcome the existing fiber network weaknesses. This design will require new conduit to be installed that will house the fiber optic cabling. Completed 10/ 2009.
 - Bids were reviewed and vendors selected for the installation of the conduit and fiber optic cabling. Completed 10/ 2009.

- Completed installation of new conduit and fiber optic cable for all existing buildings on the Fayette campus. Termination and testing of the new cabling for the existing buildings has been completed as of 04/ 2010.
- Completed installation of new conduit and fiber optic cable for new liberal arts and student housing buildings. Termination and testing of the new cabling completed 05/2010.
- Completed installation and termination of new conduit and fiber optic cabling for the new student center building. Completed 12/2010.
- **Core Network Data Switches**
 - The Fayette campus core network switches are five years old need to be upgraded to provide greater flexibility, make use of new switch technology and redundancy. Redundant fiber paths and core switches are very important for our disaster recovery plan.
 - New equipment was identified and the I.T. department reviewed competitive bids, selected a vendor, ordered and took delivery of equipment. Completed 12/2009.
 - Implementation of equipment began in January 2010 and was completed in March 2010. Updated existing building network equipment software to be compatible with new core equipment; completed 04/2010.
- **Edge Network Data Switches**
 - The Fayette campus edge (building) network switches are five plus years old and much like the core switches, need to be replaced.
 - BH science building was identified as a strategic location for a new network equipment to assist in the creation of redundant data paths and to refresh existing network switch equipment.
 - New equipment was purchased and installed 10/2010.
 - *Developing plan for refresh of network equipment for remaining buildings, including center locations.*
- **Internet Access**
 - Installed a link controller that manages both Fayette campus Internet connections and is configured to load balance during normal operating conditions and failover automatically to the working link if one link fails. Completed 05/2010.
 - Upgraded the bandwidth of one Internet circuit so both links have the same capacity. Completed 07/2010.
- **Security Improvements**
 - Installed a dry fire suppression system in the AD data center. Completed 07/2009.
 - Installed an intrusion detection and prevention system to monitor the Internet circuits. Completed 05/2010.
 - Installed second ASA security appliance for backup and redundancy capabilities. Completed 05/2010.
- **New construction on Fayette campus**
 - Installed and configured new networking infrastructure for both Liberal Arts and Student Housing building. Completed August 2010.
 - Installed teacher stations and computer labs in Liberal Arts building. Completed August 2010.
 - Installed computer lab and network printers in Student Housing building. Completed September 2010.
 - *Preparing for install of technology related equipment in the Student Center.*
- **Hong Kong Center**
 - Recent testing allowed the Hong Kong staff to connect and access campus resources on the university's network. Completed 4/2009.
 - An inventory of technology equipment at the Hong Kong center has been completed. 04/2009.

- Hong Kong staff members are now a part of the UIU email staff distribution lists. Completed 04/2009.
- An ASA networking unit was installed; the HK Center is now officially on our WAN. Completed August 2010.
- **Telephone system (PBX)**
 - Upgraded software on AE center phone systems as part of the campus upgrade project. Completed 07/2010.
 - Major upgrade of both hardware and software was needed to accommodate both current and future growth and expansion of the Fayette campus. Completed 12/2010.
- **Interactive Video Services**
 - Interactive video conferencing system received new audio and control systems updates to make the rooms more user friendly for Waterloo, Des Moines, and Fayette. Completed 01/2011.
- **Pearson Learning Studio Software Application**
 - Designed and wrote a software application that pulls faculty, student, and course information from Jenzabar and uploads this information to the eCollege system. Completed 01/2010.
 - *Reviewing change requests for an updated application.*
- **Establish a Help Center**
 - Hire Help Center manager to lead initiative. Completed 11/2010.
 - Establish training program for Help Center staff. Begin hiring and training staff members. Completed 12/2010.
 - Launch first phase of Help Center. Completed 01/2011.
 - *Preparing and developing phase II of implementation plan.*
- **Enterprise Users Group (Jenzabar)**
 - This user group was formed to improve communication among the module managers, review training options available from Jenzabar, and to standardize on operating procedures. Completed 02/2010.
 - Created a standardized method of scheduling Jenzabar EX/JICS updates. Completed 06/2010.
 - Developed a new method of submitting duplicate ID# requests. Completed 07/2010.
 - *Reviewing and discussing the Jenzabar assessment report.*
- **IT Services website**
 - Developed a website that allows staff members to assist students and adjunct faculty members in resetting myUIU and Windows Live passwords, streamlines the requests for accounts for new employees and new computer hardware purchases and provides access to an online campus phone directory. Completed 10/2010.
- **Access control system**
 - New hardware and software installed to allow for student card access for new construction and Aramark dining services. Completed July/August 2010
 - Data link project – A data link was created to transfer faculty, staff, and student information from the Jenzabar EX database to the access control software. Completed December 2010.
- **GoArmyEd**
 - Created a template for the South-Central region centers that allows course information to be uploaded to a secure FTP site each term. This procedure automates what was a time-consuming manual process for each of the center directors. Completed November 2010.
- **Windows Live Migration**
 - Worked with Microsoft to successfully migrate to a newer version of the student, adjunct faculty, and alumni email system. Completed October 2010.
 - *Reviewing the possibility of migrating to Outlook Live.*
- **Jenzabar assessment of UIU**

- Jenzabar conducted an operational assessment of UIU's business processes in relation to the use of the Jenzabar EX product. Completed in September 2010.
- *UIU will review a forthcoming report/recommendation document. TBD.*

7 Develop the practices and programs to effectively communicate the UIU mission and vision to all constituent stakeholders

(Khoury)

- **Marketing**
 - *RFP issued to develop an Integrated University-wide Marketing Campaign; proposals have been received and are being evaluated prior to vendor selection.*
 - *Three companies chosen to present on campus in May*
 - *Continued exploration of feasibility and advisability of developing a 3-D interactive virtual UIU website for use in recruiting*
 - *Collaboration with AE on a variety of image-enhancing marketing/advertising initiatives.*
- **Advertising**
 - *First phase completed of multi-media production/ buy promoting Fayette Campus construction; includes one completed TV ad, newspaper advertisement, three web banners and three website pre-roll elements; second TV ad is in production; third TV ad will be short, produced, and placed this spring; radio ads are in development.*
 - *Currently reviewing proposals from production companies for high-quality, all-University advertising campaign (1 image-building; 3 for more targeted marketing use).*
- **Media Relations**
 - *Focused media relations consultant on enhancement of UIU's national reputation by highlighting President Walker; regional interviews conducted; in development on several additional stories with regional and national media outlets.*
 - *Secured a one year commitment with partner to ensure continued public relations and non-paid media presence.*
- **Website Redesign and Launch**
 - *Continued enhancement of redesigned website, additional elements, and working with other departments to strengthen and update website content*
 - *Created a departmental timetable to ensure all areas are updated by July 1st 2010*
- **Social Media**
 - *Introduction of social media as a key part of UIU online communications; currently using Flickr, Facebook, and blogging. 11 blogs to date, more scheduled to begin and end on staggered calendar, due to topical nature of blogging.*
 - *Initiated a Facebook redesign to incorporate call to action for recruitment and advancement, expected launch June 2010.*
 - *Twitter will be integrated with pre-RAGBRAI communications and during event;*
- **Reputation Enhancement Project**
 - *Collaborative effort to redefine Common Data set complete; provided updated UIU data to significant third-party websites (Peterson's, Princeton, US News & World Report, etc.) for more accurate reporting about UIU on the web and in publications; have also updated information on other third-party websites, such as Wikipedia.*
 - *University-wide effort to address departmental gaps in data collection that feed peer-review sites.*

- **Policy Development**
 - Policies to support a consistent, integrated marketing approach to all activities, publications, and productions are posted online.

8 Develop a comprehensive UIU advancement resource

(Snodgrass)

- **Staffing**
 - *New Organizational Structure to reflect a cultivation model for UIU (4/11)*
- **Major/Planned Giving Activity**
 - Defined Major Gift to \$10K (12/10)
 - Wealth analysis completed on data base (11/09)
 - *Potential Trustees Evaluated with WE analysis (on-going)*
 - Database narrowed to top 1,000 prospects (1/11)
 - Evaluation and Verification of List (on-going)
 - Planned Giving website (6/10)
 - *Monthly e-newsletters (monthly on-going)*
 - *Seminar Program (under development 8/11)*
 - *Updated Gift Acceptance Policy (under review 5/11)*
 - *Donor Recognition Policy (under review 5/11)*
 - *Initial meetings with prospective donors are occurring (on-going)*
 - *Donor Tracking System initiated (12/11)*
 - *Working with Divisions and Department for Shopping List (on-going)*
 - *Continued Education Process with University Community*
 - *Major Gift Wins*
 - Signed gift agreement and 125k cash gift (1/10)
 - *12/2009 Gift Proposals: \$250,000 (deferred); \$21,000 (cash and pledge) endowed scholarship**
 - 12/2009 Signed gift agreements: \$21,000 (cash and pledge) – noted above
 - Finalized Honors Program; \$75,000 pledge and \$750,000 deferred gift
 - *Ask: \$100,000+ Name UIU as a Trustee (2/2010); meeting scheduled 3/2010)*
 - Signed Gift Agreement for \$40,000 Scholarship (1/11)
- **Stewardship of donors**
 - *Campus and Regional Events (on-going)*
 - *Quarterly communication with Major Gift donors (on-going)*
 - *Hold annual donor recognition event, President's Society, for annual givers of \$1000+ (on-going)*
- **Annual Scholarship Fund**
 - Defined Annual Fund (12/10) i.e. Repeatable and Sustainable Gifts
 - *Phonathon (on-going)*
 - *Direct Mail (on-going)*
 - *Volunteer Fundraising (on-going)*
 - *Team Peacock (on-going)*
 - *Parent's campaign (on-going)*
 - *New Graduate Campaign (on-going)*
 - *Board Solicitation (on-going)*
 - *Faculty/Staff Campaign (on-going)*

- **Alumni Program**
 - *Development of IMODULES (7/11)*
 - *Alumni Gatherings, minimum of 8 a year (on-going)*
 - *Alumni Directory Program (3/11 and on-going)*
 - *International Alumni Network (2/11 and on-going)*
 - *Communication (on-going)*
 - *Bridge*
 - *FeatherNotes*
 - *Website*
 - *Emails*
 - *Social Media*
- **Grants and Foundations**
 - *Changed Grants Working Committee to Grant Oversight Committee (1/11)*
 - *New Grant Approval/Writing Process (1/11)*
 - *Foundation Search for UIBD Grantor (on-going)*
 - *Working with City on Bolger dollars*
 - *12/2009 Proposals: John Deere (\$40,000) Declined*
 - *Charles Steward Mott Foundation*
 - *CITIGROUP FOUNDATION*
 - *HALL-PERRINE FOUNDATION*
 - *HNI CHARITABLE FOUNDATION*
 - *IOWA WEST FOUNDATION*
 - *MANSFIELD CHARITABLE FOUNDATION*
 - *MEREDITH CORPORATION FOUNDATION*
 - *NORTHEAST IOWA CHARITABLE FOUNDATION*
 - *NORTHWEST AREA FOUNDATION*
 - *PRINCIPAL FINANCIAL GROUP FOUNDATION, INC*
 - *R J MCELROY TRUST*
 - *ROCKWELL COLLINS CHARITABLE CORPORATION*
 - *THE JP MORGAN CHASE FOUNDATION*
 - *Work with faculty/staff on initiatives (on-going)*
 - *Review of Capital Campaign needs (on-going)*
 - *Work with City on Bike Trail*
 - *Recent Wins*
 - *Coleman Foundation (\$25K) 3/11*
 - *Fayette Community Foundation (\$20k) 3/11*
 - *AmeriCorps Grant (\$50K) 9/10*
- **Capital Campaign**
 - *Campaign Plan Presented to CEO/CFO (2/11)*
 - *Campaign Plan Presented to Board Chair and Advancement Chair (3/11)*
 - *Gift Chart Complete (2/11)*
 - *Internal audit and review of procedures, reports and infrastructure underway (3/2010 forward)*
 - *New Vice President conducted new review, changes continue (6/11)*
 - *Co-Chairs Identified (5/11)*
 - *Steering Committee (5/11)*
 - *Regional Leadership (5/11)*
 - *Gift Acceptance Policy (5/11)*

- *Donor Recognition Policy*
- *Case Statement of Need (6/11)*
 - *Consultant identified for Framework (2/11)*
 - *OCM staff preparedness for materials*
 - *Case Statement*
 - *Drawings*
 - *Videos*
 - *Website Design*
 - *Communication Material*
- *Board Commitment (6/11)*
 - *Every board member must make a significant commitment personally*
- *Donor Identification (6/11)*
 - *Need to identify three prospects for each in the donor tree*
- *Budget for Campaign (6/11)*
 - *Staffing*
 - *Travel*
- *Naming Opportunities (6/11)*
 - *Liberal Arts Building*
 - *Student Union*
 - *Athletic Complex*
 - *Andres Center*
 - *AE Sites???*
 - *Etc...*

9 [Develop strategies and plans to enhance the quality of greater-Fayette as the residential, life-style and economic center of UIU's future](#)

(Wenthe)

- FY 2009 Congressional Appropriation secured - \$238,000 federal earmark for “e-Center equipment.”
 - *FIPSE funds approved, to be drawn down prior to 07/31/10.*
 - *FIPSE implementation team, consisting of eight initiative working groups, continues work - \$238,000 earmark being spent to advance strategic initiatives six and nine*
- Two funding requests submitted to Congressional delegation for FY 2010 – submissions are for technology/equipment and e-Center construction (not funded)
- *FY 2011 appropriations requests submitted (\$1 million dollars through Transportation budget bill – Economic Development Initiatives account and \$830,000 through Labor/HHS/Education budget bill – FIPSE account)*
- First two Upper Iowa Business Development (UIBD) grants awarded (\$15,000 to Fayette Flooring and \$40,000 to funeral home/real estate start-up). Construction has started on both Main Street, Fayette businesses.
 - Third annual UIBD grant application released – 18 inquiries for restaurant/sports lounge RFP
 - Iowa Department of Economic Development Grow Iowa Values Fund grant of \$55k secured, to be used to offset UIU contribution to FY10 and FY11 UIBD grants
- *Completed second of three-year USDA Rural Community Development Initiative grant (\$139,500) to develop a highly optimized website marketing the assets and businesses along the Highway 150 corridor*

from Oelwein to West Union, assist area businesses with website development, market the UIU e-Center, and hire an e-Center director to perform these and other duties.

- *Dr. Gerry Scheffemaier, new e-Center director, began duties October 26, 2009.*
- *e-Center/Upper Iowa Corridor asset inventory complete, website soft launch in April 2010*
- *Business assistance seminars have begun on Fayette campus*
- Engaged City of Fayette stakeholders in conversation regarding how city can capitalize on Upper Iowa's growth – stressing importance of developing housing and retail opportunities in Fayette.
 - UIU purchased land from City of Fayette as part of agreement to use previously owned property for construction of 10 housing units prior to October 2011
- Expanded scope of facilities master planning to include office and service functions on Main Street.
 - Revitalization grants (\$10k) approved by City.
- *UIU master planners drafting building frontage sketches for two UIBD grant awardees, and strategic planning with City of Fayette has begun.*
 - Community forum held to discuss downtown planning, master planners now working with these ideas. City council approved comprehensive strategic plan funding for City of Fayette.
 - City Council approved downtown master plan
- E-Center: programmatic planning for facility.
- *E-center and IT student/grad collaborative "Heartlanding" initiative underway, which will provide web and IT support for local businesses.*
 - *USDA Rural Business Enterprise Grant proposal awarded, two-year, \$99,000 grant began 10/01/09.*
 - *Site visit by USDA Rural Development State Director*
 - HITSC completed work with 5 clients, currently working with 5 (including two revenue generating clients)