



Executive Leadership - 6.0

- President & CEO
- Real Estate / Executive Assistant
- Trustee Relations
- General Counsel
- Administrative Assistant
- Administrative Assistant (shared with planned giving)

Finance & Accounting - 6.5

- Chief Financial Officer
- Controller
- Financial Analyst
- Financial Analyst
- Associate Financial Analyst
- Senior Fiscal Services Tech
- .5 Administrative Assistant (shared with gift & records processing)

Human Resources/Facilities Mgmt. -3

- Senior Director of Human Resources
- Human Resources Specialist/Facilities Management
- Building Receptionist

Operations Management -2

- Senior Director of Advancement & Administration Services
- Associate VP for Development Services

UNMF Foundation - Comparing 2009 to 2012 Staffing <i>(Includes 1 open but unfilled position)</i>	UNMF as of January 2009	UNMF as of February 2012	Function
Fundraising and Donor Support			
Stewardship & Events - AVP Development Services	1	1	<i>Supervises annual giving, donor relations, communication/marketing</i>
*Donor Relations Staff	6	6	<i>Endowment management, Stewardship, events management, donor acknowledgement</i>
IT/Information Services - Sr. Director	0	1	<i>Manages IT, Gift processing, IT and supervises AVP Development Services</i>
*IT/Information Services	7	4	<i>Work with complex information technology systems, custom programming and reporting, data storage & systems</i>
*Gift & Records Processing	9	8.5	<i>Receive and enter gifts in database; assure proper coding to donor intent.</i>
Marketing/Communication	3	2.5	<i>All e-mail communication to alumni, 3 web sites, writing major gift proposals, PR & Marketing</i>
Prospect Research	4	2	<i>Mining for new prospects and research for fundraising</i>
<i>SUBTOTAL Fundraising Support Staff</i>	30	25	
Fundraising - University-Wide & Unit Based			
Annual Giving	9	5	<i>Gifts , \$25K, alumni appeals, clubs, associations, throughout HSC, Main & Athletics</i>
Corporate/Foundation (>\$25K)	2	3	<i>Cultivation & proposals</i>
*CFR - Research & Support	2	1	<i>Research and data gathering for CFR; admin support</i>
Planned Giving (>\$25K)	1	1	<i>JD w/ specialization in planned giving</i>
*Planned Giving Specialist/Support		0.5	<i>Part-time admin assistant with additional expertise in planned giving.</i>
Leadership & Principle Gifts	2	2	<i>Gifts of \$1M+ and management of major gift fundraisers</i>
HSC - Major Gifts (>\$25K) (10)	6	7	<i>Cultivation, proposals & stewardship of \$25K+ prospects</i>
*HSC - Donor cultivation & support	4	2	<i>Admin asst., alumni, events .Gifts <\$25K, alumni appeals, clubs, associations.</i>
Main Campus - Major Gifts (>\$25K)	13	12	<i>Cultivation, proposals & stewardship of \$25K+ prospects</i>
*Main - Donor cultivation & support	5	6	<i>Admin asst., alumni, events. Gifts <\$25K, alumni appeals, clubs, associations.</i>
Athletics - Major Gifts (>\$25K)	2	2	<i>Cultivation, proposals & stewardship of \$25K+ prospects</i>
*Athletics - Donor cultivation & support	2	2	<i>Gifts <\$25K, alumni appeals, clubs, associations.</i>
<i>SUBTOTAL: Major Gift Fundraisers</i>	26	27	
<i>SUBTOTAL: Donor Cultivation/Support Staff</i>	22	16.5	
Business Management			
Executive Leadership	1	1	<i>President, CEO - Principal Gifts & Overall Responsibility</i>
*Exec Admin Support/Real Estate Specialist	1	1	<i>Admin assistant with credentials & expertise in real estate.</i>
*Exec Admin Support	1	1	<i>Provides general admin support to the Executive Office.</i>
*Board of Trustees Admin	1	1	<i>Supports Trustees and all committees of the Board.</i>
*Campaign Staff	1	0	<i>Initial messaging, planning for campaign through 5/11.</i>
Finance & Accounting - CFO	1	1	<i>Overall responsibility for financial, accounting, budget and treasury functions.</i>
*Controller	1	1	<i>Manages day-to-day activity, executes investment transactions & prepares financial reports.</i>
*Financial Analyst	2	2	<i>Analyzes and reconciles transactions, processes payroll, prepares gift annuity payments.</i>
*Associate Financial Analyst	1	1	<i>Monitors cash balances, reconciles bank statements and posts endowment transactions.</i>
*Sr. Fiscal Services Tech	2	1	<i>Deposits cash receipts, processes accounts payable, reconciles credit card statements.</i>
*Administrative Asst	0	0.5	<i>Records cash receipts, UNM employee time and leave, journal entries.</i>
Human Resources & Facilities - Sr. Director	1	1	<i>Overall responsibility for HR , benefits, and employee management</i>
* HR Specialist/Facility Management	1	1	<i>Admin tasks and building management</i>
*Building Receptionist	1	1	<i>Reception for all visitors to Lomas offices</i>
Legal	1	1	<i>HR issues, Planned Giving, Real Estate, Compliance, Insurance, Gift Agreements, Policy Development</i>
*Legal admin assistance	1	0.5	<i>Part time admin assistance</i>
<i>SUBTOTAL -Business Management Staff</i>	17	15	
TOTAL	95	83.5	



2012 Summary of Departments and Staff Population

Executive Office

The President/CEO is responsible for the day-to-day management and operations of the UNM Foundation in accordance with the by-laws of the Foundation. The President/CEO works closely with the UNM President to provide vision and direction to a full-scale integrated development program. The President/CEO will represent the Foundation's Board of Trustees in working with the community and the University's many external constituents to help realize the Foundation's goals.

Staff: Chief Executive Officer / President - 1
Director of Trustee Relations – 1
Administrative & Real Estate Associate – 1
Administrative Assistant – 1

Annual Giving

Annual giving is one of the most important areas in an organization's fundraising efforts. Annual giving consists of many separate solicitation vehicles. When these vehicles are assembled together with skill, they can form the foundation of the institution's philanthropic support. Annual giving is about donor acquisition, repeating the gift and upgrading the gift. Annual giving creates the habit of giving on a regular yearly basis. Donors who have consistently contributed annually over a certain period of time eventually make much larger major gifts or even planned giving, like bequests, later in life. The UNM Foundation's annual giving department includes direct marketing programs, Presidential Scholarship, the 1889 Society, and Children's Miracle Network.

Staff: AVP – 1 (*AVP responsible for Annual Giving, Research, Donor Relations, and Communications*)
Director – 1
Associate Directors – 4
Development Assistant – 1
Students – 2

Communications

The UNM Foundation Communication Department is the main point of contact for news media seeking information about the university and operates a news information service for the UNM Foundation. We are also responsible for the Annual Report, monthly internal communication, UNMF's website, and the UNMF Intranet.

Staff: Director – 1
Communication Specialist – .5
Web Designer – 1

Corporate & Foundation Relations

Corporate & Foundation Relations (CFR) is a four-person team. CFR works with all units of UNM to secure gifts and grants from corporations, corporate foundations, private foundations, and other organizations. Some of the services provided include:

- Working with leadership to identify, develop and implement fundraising strategies.
- Identifying specific potential funding sources for University initiatives.
- Writing and editing proposals.
- Offering educational opportunities for CDOs and faculty.

Staff: Senior Director – 1
Director – 2
Research Specialist – 1
Student - 1

Donor Relations

Donor relations are tasked with building and sustaining lasting connections between the UNM Foundation and those who support UNM with their gifts, talents and involvement. Endowment relations are under the Donor Relations umbrella here at UNMF. Through a central program, they encourage and promote the support of friends and alumni through:

- Ensuring that donors are appropriately thanked and meaningfully recognized for their contributions
- Reporting to donors consistently and accurately about the impact of their gifts
- Providing opportunities for engagement in the life of the university.

Staff: Director – 1
Manager – 1
Officer – 1
Associate – 1
Coordinators – 2

Finance

The Finance and Accounting Department plans, organizes, leads, and monitors the financial activities of the UNM Foundation. The staff is responsible for the day to day management of all the Foundation's financial and accounting functions including, but not limited to: Cash Receipts, Accounts Payable, Accounts Receivable, Financial Reporting, overseeing the joint Foundation and University's Consolidated Investment Fund, Treasury Operations, Budget Monitoring and Forecasting.

Staff: CFO – 1
Controller – 1
Financial Analyst – 3
Tech – 1
Assistant - .5

Gift & Records Processing

The Gift & Records Processing Department processes all university contributions including gifts, pledges, and pledge payments. This office receives, records, and legally receipts gifts of all forms – monetary and gift-in-kind. Our goal is to ensure that donations are in compliance with university policies and federal regulations, are in accordance with donor intent, and that security and confidentiality is maintained in the processing of all records.

Staff: Manager – 1
Supervisor – 1
Associate – 1
Gift Processing Reps – 4
Assistant - .50
Students - 3

Health Science Center (HSC) Development

The VP of HSC Development is tasked with providing leadership for the development effort and serves as an advisor on development for the Deans and their working committees. Additional responsibilities include:

- Initiates, coordinates, and evaluates all fundraising activities, provides guidance and leadership to the HSC community including administrators, faculty, staff, students, and volunteers relative to fundraising activities.
- Personally identifies, cultivates, and solicits prospects for major gifts as defined by the Foundation's development standards through visits and other forms of direct contact.
- Establishes revenue and performance goals.
- Directly supervises all development HSC operating units and associated personnel.

The Health Sciences Center includes the College of Nursing, College of Pharmacy, School of Medicine, the UNM Cancer, and UNM Hospitals.

Staff: VP - 1
Senior Director – 3
Senior Development Officer – 1
Development Officer (Director of Development) - 3
Associate Director – 2
Assistant Director – 1
Executive Assistant – 1

Human Resources and Facilities

The Human Resource department is tasked with the planning, implementation, operation, and administration of all generalist and employment-related services, ensuring maximum efficiency, cost-effectiveness, compliance with all applicable laws, regulations, and policies, and consistency with the Foundation's overall mission, goals, and objectives. The generalist and employment-related services include the HR department having responsibility for compensation and benefits, training and development, performance management, policy development and implementation, employee communication plans and strategies, strategic business planning, retirement planning, legal compliance, discipline, and employment termination. The HR department provides human resource consultation, training, and support to the Foundation.

Members of the HR department also provide facility management, which includes: security access responsibility, liaison with property management; and safety and evacuation training.

Staff: Senior Director – 1
Generalist/Facilities – 1
Assistant – 1
Students – 1

Information Technology

IT manages technology spans wide variety of areas that include but are not limited to things such as processes, computer software, information systems, computer hardware, programming languages, and data constructs. In short, anything that renders data, information or perceived knowledge in any visual format whatsoever, via any multimedia distribution mechanism, is considered part of the domain space known as Information Technology (IT). We are responsible for long range planning and implementation of new information computer systems which best meet the requirements of user departments.

Staff: Senior Director – 1 (*Sr. Director responsible for Information Technology, Gift Administration, and Gift & Data Processing*)
System Administrator – 1
Senior Program Analyst - 1
Programmer – 1
Training Specialist – 1
Data Entry (Temp) – 1
Students – 3

Legal

The General Counsel provides representation of the UNM Foundation in all legal process in the court and does all its legal issues connected to the UNM Foundation as an employee of the organization. Areas handled by General Counsel include:

- Risk Management – handles purchase of and claims made under liability insurance policies
- Gifts, Estates, and Trusts
- Contract Preparation and Review
- Public Relations – manages crisis communications, presentations
- Employment – review of employee handbook, forms, and communications
- Compliance
- Litigation
- Corporate Law

Staff: General Counsel – 1
Assistant – .5

Planned Giving

The Director of Gift Planning develops, promotes, implements and manages/directs the Foundation's Planned Giving program including the development of comprehensive plans for soliciting and securing major planned gifts.

Staff: Director – 1
Assistant – .5

Research

The Research Department is responsible for the coordination and production of information on the prospects and donors to the Foundation, to the University and the Health Sciences Center, for tracking cultivation and solicitation progress, and for prospect identification.

Staff: Manager – 1
Specialist – 1
Coordinator – 1

University Development

The VP for University Development is responsible for overseeing fundraising for main campus and athletics. The departments include development and major gift fundraising, more specifically front line fundraisers for specific colleges/schools including: College Of Engineering, College of Education, College of Fine Arts, School of Architecture & Planning, University Libraries, Popejoy Hall, Anderson School of Management, College of Arts & Sciences, School of Law, and the Department of Intercollegiate Athletics.

The development staff, for each of the units, have a primary function of raising major gifts for their units to include either donor interests or unit initiatives dictated by Deans and other leadership in their area.

Staff: VP – 1
Senior Director – 2
Senior Development Officer – 2
Associate Athletics Director for Development – 1
Assistant Athletics Director for Major Gifts – 1
Assistant Athletics Director for Development – 1
Director of Development – 6
Development Officer – 2
Assistant Director – 2
Development Coordinator – 2
Executive Assistant – 1

2011 Institutional Advancement and Alumni Relations Compensation Survey

Survey Background:

The Institutional Advancement & Alumni Relations Compensation Survey conducted by McConnell & Company was started in 1999 as part of an annual client project for the Florida State University Foundation (FSUF). FSUF sponsored the survey for 10 years as the participant group gradually expanded and the report became widely referenced among Advancement professionals. In 2010, the survey transitioned from being sponsored by one organization to participant driven; allowing more adaptability in the content surveyed, increasing the scope of invited participant organizations, and more report offerings (such as custom peer group data cuts).

What sets the McConnell & Company survey apart from other nationally conducted compensation surveys is that data is collected for each incumbent (individual) as opposed to collecting the average of all incumbents with the same job title/code. This gives our data a more robust perspective in terms of defining a true salary range for the position. We collect data for 50 different positions commonly found in a development and alumni relations environment. Jobs are matched on responsibilities not titles. All survey reports are consistent with safe harbor guidelines issued by U.S. Dept. of Justice & U.S. Federal Trade Commission.

Participant List:

ASU Foundation for A New American University	University of Iowa Foundation
Clemson University Foundation	University of Kentucky
Georgetown University	University of Maryland -College Park
Georgia Institute of Technology	University of Mississippi Foundation
Georgia State University Foundation	University of Missouri (MIZZOU)
Indiana University Foundation	University of Nebraska Foundation
Iowa State University Foundation	University of North Texas
Kansas University Endowment	University of Pittsburgh
LSU Foundation	University of South Alabama
Minnesota Medical Foundation	University of South Carolina
North Carolina State University	University of Washington
Oregon State University Foundation	University of Wisconsin Foundation
Rutgers University Foundation	USF Foundation Inc.
Stony Brook Foundation	Villanova University
Temple University	Virginia Tech
Texas A&M Foundation	West Virginia University Foundation, Inc.
The Florida State University Foundation	Western Kentucky University Foundation, Inc.
The University of Arizona Foundation	
The University of Montana Foundation	
The University of New Mexico Foundation	
The University of Tennessee Foundation, Inc.	
UGA Foundation	
University of Alabama at Birmingham	
University of Central Florida Foundation, Inc.	
University of Cincinnati Foundation	
University of Colorado Foundation	
University of Florida Foundation, Inc.	
University of Illinois Foundation	

2012 Number of Staff	UNMF Title	Yrs Exp	UNMF Median	Salary Median	Yrs Exp	Survey Position	Classification Job #	Head Count
1	CEO	30	\$281,000	\$ 299,211	7.0	Head of Advancement	1001	46
1	VP for Development	14	\$140,000	\$ 170,058	8.0	Head of Major Development	1002	43
0	Not Filled Budget Constraints			\$ 140,000	10.0	Head of Central Fundraising	1003	30
1	Director of Advancement & Admin Services	35	\$152,000	\$ 173,400	10.3	Head of Administration/COO	1004	23
0	Not Filled Budget Constraints			\$ 164,050	6.0	Campaign Manager	1005	10
1	Director of Gift Planning	20	\$101,000	\$ 120,000	7.6	Head of Planned Giving	1006	37
1	Director of Annual Giving	8	\$85,000	\$ 85,000	5.0	Head of Annual [General] Giving	1007	36
1	Alumni University Position			\$ 152,437	8.5	Head of Alumni Relations	1008	21
1	General Counsel	27	\$172,950	\$ 156,137	14.0	General Counsel	1009	12
1	Dir of Trustee Relations & Dev	16	\$74,000	\$ 86,441	6.0	Chief of Staff	1010	10
1	Assoc VP	14	\$106,072	\$ 129,043	6.1	Head of Advancement Services	1011	23
0	Not Filled Budget Constraints			\$ 142,479	14.0	Principal Gifts Officer	1100	28
1	VP of HSC Development	14	\$160,000	\$ 175,200	5.0	Head of Health Center/College of Medicine Development	1200	18
0	Not Filled Budget Constraints			\$ 110,240	8.0	Unit Manager	2010	98
4	Sr. Director of Development	10	\$90,250	\$ 94,211	5.4	Major Gifts Officer - Senior	2011	245
11	Director of Development	10	\$68,000	\$ 73,144	3.7	Major Gifts Officer - Intermediate	2012	473
4	Associate Director of Development	7	\$46,500	\$ 53,371	2.0	Major Gifts Officer - Associate	2013	231
1	Corporate/Foundation Senior Director of Development	18	\$90,000	\$ 99,720	5.0	Corporate and/or Foundation Gifts Officer - Senior	2021	51
1	Corporate/Foundation Director of Development	8	\$80,000	\$ 72,000	3.0	Corporate and/or Foundation Gifts Officer - Intermediate	2022	49
0	Not Filled Budget Constraints			\$ 53,555	4.0	Corporate and/or Foundation Gifts Officer - Associate	2023	10
5	Associate Director/Asst. Director	9	\$44,000	\$ 45,395	3.0	Annual Gifts Officer	2030	92
0	Not Filled Budget Constraints			\$ 85,250	4.6	Planned Giving Officer	2040	82

2012 Number of Staff	UNMF Title	Yrs Exp	UNMF Median	Salary Median	Yrs Exp	Survey Position	Classificatio n Job #	Head Count
0	Not Filled Budget Constraints			\$ 80,269	4.0	Regional Development Officer	2050	76
0	Not Filled Budget Constraints			\$ 73,000	6.0	Head of Research and Prospect Mgmt	2200	40
1	Research Specialist	9	\$38,820	\$ 41,550	3.3	Research Analyst	2201	164
1	Director of Donor Relations	11	\$73,130	\$ 73,797	10.0	Head of Donor Relations	2300	38
2	Donor Relations Officer/Donor Relations Associate	8	\$45,762	\$ 48,000	3.7	Donor Relations Officer	2301	61
	University Position			\$ 47,975	4.7	Events Planner	2302	68
	Alumni University Position			\$ 76,492	7.0	Head of Alumni Marketing & Membership	2400	16
	Alumni University Position			\$ 45,900	2.9	Alumni Marketing Officer	2401	23
	Alumni University Position			\$ 80,700	11.0	Head of Alumni Programs and Outreach	2500	18
	Alumni University Position			\$ 48,292	4.0	Alumni Relations Officer	2501	74
1	Director of Communications	30	\$70,000	\$ 84,788	3.3	Head of Communications	2600	34
1	Marketing/Web	14	\$50,000	\$ 58,000	5.0	Communications Officer	2601	77
1	CFO	29	\$168,000	\$ 158,340	10.0	Chief Financial Officer	3100	31
1	Controller	8	\$90,000	\$ 88,230	7.9	Asst Dir of Finance and Accounting	3101	37
	Not Filled Budget Constraints			\$ 65,920	8.0	Head of Gift Processing/Data Mgmt	3102	40
1	Senior Director of HR	18	\$95,000	\$ 89,148	8.0	Head of Human Resources	3200	28
	Not Filled Budget Constraints			\$ 105,019	8.0	Head of Information Services	3300	37
	Not Filled Budget Constraints			\$ 74,020	11.1	Network Administrator	3301	36
	Not Filled Budget Constraints			\$ 67,018	5.0	Senior Web Developer	3302	25
	Not Filled Budget Constraints			\$ 229,700	5.2	Head of Investments/Chief Investment Officer	3400	8
	Not Filled Budget Constraints			\$ 114,253	4.0	Director of Investments/Investment Manager	3401	16
	Not Filled Budget Constraints			\$ 64,050	3.4	Investment Analyst	3402	12
1	UNMF 2nd Highest Paid Executive		\$172,950	\$ 198,250	6.0	2nd Highest Paid Executive	4002	46
1	UNMF 3rd Highest Paid Executive		\$168,000	\$ 185,450	8.0	3rd Highest Paid Executive	4003	46
1	UNMF 4th Highest Paid Executive		\$160,000	\$ 162,750	6.0	4th Highest Paid Executive	4004	46
1	UNMF 5th Highest Paid Executive		\$152,000	\$ 150,000	7.8	5th Highest Paid Executive	4005	45

How Public College & University Foundations Pay for Fund-Raising

by Royster C. Hedgepeth

AGB

ASE

A study published by the
**Association of Governing Boards
of Universities and Colleges**
and the
**Council for Advancement and
Support of Education**
with generous support from the
Society for Institutionally Related Foundations

Pros and Cons of Key Revenue Sources

College and university respondents in the survey reported using a total of 20 sources of revenue to fund their fund-raising budgets.

Here are the sources and the number of foundations (institutions) that reported using each:

Unrestricted gifts	28
Endowment management fees	25
Income on daily cash balances	19
Employees on institutional payroll	17
Administrative fees assessed on new gifts	12
Alumni funds	11
State and institutional funds budgeted for fund-raising operations	7
Contract for services	6
In-kind from the institution	6
Academic unit charge backs	5
Endowment designated for fund-raising	3
Real estate sales	1
Real estate leases	1
Unrestricted endowment	1
Special events	1
Designated gifts	1
Endowment growth	1
Foundation reserves	1
Overhead added for specific projects	1
Entrepreneurial projects	1
Unstated	4

The five sources that appear to have the greatest capacity for providing significant increases in fund-raising budgets are:

- institutional support—a category that includes several sources: state and/or institutional funds, contracted services, employees on

institutional payroll, in-kind institutional support (usually space and various services), and school, college, departmental or project charge-backs;

- unrestricted gifts;
- endowment management fees;
- income on daily cash balances; and
- fees assessed on gifts.

Each source of funding has its proponents and its opponents. The strengths and liabilities of each are discussed below:

Institutional Support

Proponents of institutional support for fund-raising and/or foundation operations point out that many institutions have provided such support historically. This is true especially for programs in start-up or emerging status. Using institutional funds conveys to donors the message that the institution is making an investment in its own future. Moreover, it can ensure a close link between the institution's priorities and the foundation's fund-raising efforts.

Institutional funds can be the most readily available and predictable because they come through the regular budget cycle. On the other hand, they can be vulnerable to cutbacks when institutions find their budgets squeezed by state funding constraints, especially during economic downturns. When fund-raising budgets are