

FOUNDATION AND DEVELOPMENT

- ⦿ The endowment has a value of \$56 million.
- ⦿ Total Foundation assets are now \$65 million.
- ⦿ Planned giving inventory is over \$40 million.
- ⦿ Gifts and pledges now total over \$13.7 million.

PLANNED GIFTS

◎ Kay Kennedy

\$2,278,400 received



◎ Sam & Marianne Oliva

\$5,000,000 planned gift

pledge

PLANNED GIFTS

- ◉ Velma “Toby” McCamey \$300,000 planned gift
- ◉ Jody McCamey \$100,000 planned gift



FY16 FOUNDATION FUNDS USED

- ◎ \$16,000 – Alumni House project (correct a problem)
- ◎ \$35,000 – Initial set-up of scholarship software
 - \$25,000 annually to streamline scholarship access for students (Scholarship office does not report to the Foundation)
- ◎ \$10,000 – Annual support for Vice Presidents
- ◎ \$30,000 – Annual support for the president
- ◎ \$35,000 – Annually to pay new accountant salary (starting January 2016)
- ◎ \$275,000 (approx.) – To assist with University's Master Plan (purchase 3 properties and tear down to homes)
- ◎ \$5,000 – Annual support for WIU employees' retirement gifts
- ◎ Initial support and seed money for Rocky on Parade

FY16 FOUNDATION FUNDS USED

- ⊙ Retirement receptions for Ken Hawkinson & Julie DeWees
- ⊙ \$6,500 – Support for Fallen Soldiers 5K
- ⊙ \$15,000 – Support for art restoration
- ⊙ \$10,000 – Pay off remainder of band uniforms bill
- ⊙ \$5,000 – Support the Biology RISE program

FY17 FOUNDATION FUNDS USED

- ◎ \$5,000 – RISE Program
- ◎ \$1,500 – Rocky on Parade
- ◎ \$1,000 – PAS GALA
- ◎ \$1,000 – Pre-Med Symposium
- ◎ \$10,000 – Chown Golf Learning Center
- ◎ \$3,500 – Pep Band at NCAA Tournament
- ◎ \$2,500 – Distinguished Faculty Lecturer
- ◎ \$4,000 Founders' Day
- ◎ \$8,000 – Minority Achievement Program
- ◎ \$32,500 – President's Development activities
- ◎ \$17,100 – Faculty summer research stipends
- ◎ \$6,840 – Faculty McDonough awards
- ◎ \$4,000 – Ready to Run

FY17 FOUNDATION FUNDS USED

- ◎ \$3,000 – Fallen Soldiers 5K
- ◎ \$1,300 – WIU polos for Pep Band
- ◎ \$995 – Women’s Basketball Pack the Gym Night
- ◎ \$400 – Bus prospective students to WIU for visits
- ◎ \$6,500 – Historical sign markers on campus
- ◎ \$650 – Macomb Balloon Rally
- ◎ \$4,000 – Gwendolyn Brooks Park project
- ◎ \$24,255 – AcademicWorks scholarship software
- ◎ \$80,000 – Pledgemine mailing and printing
- ◎ \$12,000 – GiveCampus crowdfunding platform
- ◎ \$17,500 – DonorSearch wealth screening

FY18 FOUNDATION FUNDS USED

- ◎ \$800 – PAS GALA
- ◎ \$1,000 – Pre-Med Symposium
- ◎ \$630 – Founder's Day
- ◎ \$8,000 – Minority Achievement Program
- ◎ \$30,000 – President's development activities
- ◎ \$3,888 – Lake Ruth fountain
- ◎ \$772 – Steinway Initiative
- ◎ \$36,413 – Rock Hanson statue
- ◎ \$401 – Transportation for Jazz Studio Orchestra to Springfield
- ◎ \$500 – Math Contest
- ◎ \$1,500 – Summer Stage
- ◎ \$12,000 GiveCampus crowdfunding platform

FY18 FOUNDATION FUNDS USED

- ◎ \$650 – Macomb Balloon Rally
- ◎ \$10,260 – faculty summer research stipends
- ◎ \$12,801 – AcademicWorks scholarship software
- ◎ \$80,000 – Pledgemine mailing and printing
- ◎ \$1,000 – Necksgiving
- ◎ \$18,298 – new donor wall
- ◎ \$300 – Macomb Holiday Basketball Tournament
- ◎ \$4,500 – local school transportation to PAS events
- ◎ \$6,406 – faculty McDonough awards

ANNUAL GIVING

- ◎ 3rd annual Western Challenge in conjunction with Purple & Gold Day raised nearly \$154,000 in 24 hrs.

The Western Challenge 2018



851

donors



\$153,679

donated

This campaign ended on April 25, 2018, but you can still make a gift to Western Illinois University !

Report 18.8/3

BOT – 8/23/2018 Marketing

Suzi Pritchard, Director of University Marketing (since January this year)

New this year, University Marketing was established to deliver strategic initiatives reflecting Western Illinois University's unique offerings, to targeted audiences worldwide, measure success and connect to the goals and objectives of the University.

This year we will set out to provide strategic and tactical direction that places WIU in a proactive position. Three key areas of focus are: Increase Enrollment, Strengthen the WIU Brand and Brand Awareness.

1. **Increase Enrollment:** Explore and expand markets to generate an increase in students that meet, and exceed, WIU's admissions standards.

Generating **preference and decision making** for WIU is the ultimate goal.

In order to generate an increase in campus visits, enrollment applications and inquiries – we will:

- Enhance the website to ensure WIU is easy-to-find, easy-to-know and easy-to-enroll.
- Create quality promotional materials for use in digital, print and broadcast communications.
- Select and place media according to various target audiences identified.
- Monitor and measure success of media and placement based on the number of campus visits, enrollment applications and inquiries.

One example of success this year was with our March-May 2018 Digital Campaign...

The website plays a vital part in the success of increasing enrollment:

March-May 2018 – we had a digital campaign which generated **82k** new website visitors

- By Comparison – our previous campaign Sept-Nov 2017: **48k** new website visitors

Other success metrics for this next year will include:

- Content reflected in our marketing initiatives that align to preferences of our target audiences.
- Improved trends in digital traffic and goals achieved, and dollar figures that outperform our marketing investment.
- Continue to monitor and evaluate Media Spending FY18 to achieve the best value

Target audiences include: Undergraduates, Transfer Students, Graduate Students, NTS, Military, and influencers.

Our marketing this year will also include an array of media: digital, traditional media including broadcast, theatres, billboards, airports, vehicle wraps

2. **Strengthening the brand** to increase pride and confidence for WIU both internally, within the community and the region, for recruitment, retention and lifetime commitment.

Continue to maintain momentum of the WIU brand within the campus community as well as the Macomb community.

- Connect regularly with campus communicators on dept. promotions
- Connect with community on branding initiatives and sponsorships

3. **Brand Awareness:** We will increase general awareness of WIU to drive consideration among key targeted audiences, from prospective students, current students, parents, alumni and staff. The campaign started this June and will run to the end of FY2019, and is on-going.

In our campaign we enhance the brand image to communicate WIU as a solid, reputable university with strong academic offerings, and that happens to be affordable.

Recent research shows that our audience thinks of our environment as home-like with a close-knit, connected family. WIU is well-established with deep roots in education, and with numerous academic opportunities.

Reinforcing the successes of Western generates brand recognition and recall. This campaign is tied to the home-like theme using messaging of “Right Here at Home” or “Forever Home.”

In our advertising we show what we do at WIU, how we have great students, and those achievements that are amazing, in a safe, supportive atmosphere.

Digital, TV, direct mail, refreshed billboard and airport signage

Success just for June – July

- Digital: 325k people reached with 3.1M impressions
– 15% more than orig. projected
- Broadcast: 4.5M impressions
- Newspapers: 327k circulation
- Direct Mail: 15k printed, targeting alumni high school administrators
- Secondary campaign that started this month and will run through December
 - **New TV ad – show the new ones**

8/24/2018

Remarks for the BOT on Marketing for Quad Cities by Debbie Kepple-Mamros

- We are operating in collaboration with University Marketing with the ultimate goal of increasing enrollment. We created a plan starting this fiscal year that was arrived at over several meetings with Suzi Pritchard.
- Each of our 5 goals will be assessed throughout the year so that adjustments can be made as needed.

Goal 1

Implement strategies that are both consistent with the whole university marketing plan, but also brand the Quad Cities Campus as a unique entity.

Examples: For current fiscal year, utilize *Close to Home*, *Affordable*, and *Nationally Ranked*. May also include *Military Friendly*.

Goal 2

Create awareness to the community about WIU-QC's ability to educate a workforce for today and tomorrow

Examples: Press releases are times appropriately to draw the most interest. Social Media posts are balanced with past and present events, programs, and timely information for current and future students. Also our public involvement with events such as Viva Quad Cities, Bix 7 and Quad Cities Marathon. Have booths or tables at these events allows us to connect with community members but also showcases our brand to a nation-wide audience. At the Bix Expo alone 18,000 people walked past our booth. They may not have all stopped but they all saw purple and gold.

Goal 3

Develop and launch a multi-media campaign designed to increase awareness among the public of all programs available at the QC Campus

Examples: Launch undergraduate programs recruitment/enrollment campaign on flyers, in high school sports programs, on radio, and on social media.

Goal 4:

Create awareness and connections with both internal and external audiences through social media

Examples: Increase posts on official social media pages that raise awareness of all QC programs, both academic and co-curricular, equally and that also encourage engagement. An example of how we are assessing these efforts is that we are tracking our social media engagement and shares.

8/24/2018

Goal 5:

Promote the innovations occurring on the QC Campus

Examples: Write stories, and encourage others to write stories that focus on exciting innovations happening on campus (students, faculty and staff). Encourage others to send photos as well to aid in the production of Wibbitz videos focused on innovations. The measure of success here is how many of these stories get picked up by local and regional media.

Reports 18.8/4 and 18.8/6

Vice President for Student Services Report Western Illinois University Board of Trustees Meeting (Special Call Meeting) Friday, August 23, 2018

Good morning, our task is to share an enrollment update and provide some insight on some of the retention initiatives designed to positively impact enrollment. In spite of the challenges we face, the Office of Undergraduate Admissions continues to partner with academic departments and schools and other university entities to focus on our enrollment goals. As a collective student affairs unit, we are working collaboratively to positively impact new student enrollment for incoming freshmen and transfer students – while also focusing our efforts on persistence to degree completion.

As usual, we will release final 10th day enrollment numbers in a couple of weeks. However, real time data indicates that our new student enrollment is trending higher than what was previously predicted in March.

As we monitor our early planning, we are implementing the communication plan at earlier and later stages of our admissions processes. The communication enrollment/student success plan consists of seven stages which include: 1) Prospects, 2) Inquiries, 3) Applications, 4) Registered, 5) Attending, 6) Persistence, and 7) Graduation. This plan has been developed with the Director of Marketing to ensure that we are maximizing our efforts. We also continue to utilize past metrics, which are: phone calls, emails, and visits to high schools and community colleges.

Managing enrollment requires an emphasis on both recruitment and retention. Both must happen simultaneously to stabilize enrollment. Therefore, we have utilized focus groups and have surveyed current students about why they chose WIU? We also query students regarding factors that have kept them persisting toward degree completion? Using both these qualitative and quantitative measures, the data suggest that students chose WIU primarily for their academic degree program or major, experience during a campus visit (many students referenced that the University felt like home, or people were nice), and geographic location was another indicator for choice. Other factors which contribute to school choice are costs, safety, and association with other current students or alumni (in some instances students mentioned having a parent or other relative who is an alumnus of WIU). Factors contributing to persistence include extra and co-curricular activities, one-on-one interaction with faculty, leadership opportunities, Greek life activities and involvement, and community. This fall, the Office of Student Activities and Greek Life student leaders will work together to further improve Greek Life, which should have a positive impact on recruitment and retention because many prospective students are interested in these organizations. Fortunately, on both campuses, WIU students have access to great opportunities to become active and involved in campus life and campus activities. While we are grateful for the feedback received from students regarding the experiences at Western, we also remain committed to ensuring that all students feel welcome and are included as members of the Western Illinois University community.

This fall we will establish a Student Retention Center, which will be housed on the lower level of the University Union. No new funding will be needed for the Retention Center. The funding is

possible by a reallocation of student services funds, and support from a grant that Dr. Thomas received. The Center will be a resource for students who may need assistance transitioning to and navigating collegiate spaces. The personnel in the Center will work closely with the academic success coaches, some academic advisors, student affairs professionals, other campus leaders, and ideally with some faculty. The Retention Center will help to coordinate campus wide recruitment efforts and will collect and analyze data regarding student retention. This data will be used to help early intervention efforts and will provide context for evolving needs and changes that may be needed for high impact practices that will result in increased retention.

On both campuses, we are strengthening relationships within admissions and interaction with other institutional offices and admissions. I look forward to continue working with Undergraduate Admissions as both campuses work together to stabilize and ultimately increase overall University enrollment. One example of our relationship building is our collaboration with Dr. Jeff Hancks who leads the School of Global Education and Dr. Mark Mossman who leads graduate studies to determine how the Office of Undergraduate Admission can work well with the admissions portals for BGS and International students and students who are pursuing graduate degrees. Dr. Jason Woods, the interim director of undergraduate admissions will lead these efforts. Additionally, we continue to adjust recruiter base locations while focusing on establishing advisory interaction between admissions staff and prospective students.

Before, I close my report, I would like to share an email that Dr. Woods received from a member of the WIU community:

Dr. Woods, after I attended the recent WIU Press event, I was visiting with my colleagues on what we could do to further promote WIU. I see the website promotes the excellence WIU students have achieved, like the CPA pass rate and the 100% nursing student exam passage. However, my colleagues and I thought the WIU Facebook page and alumni and supporters of WIU could share daily or weekly postings on Facebook highlighting some of the major accomplishments of WIU students, faculty, and staff.

For example, in addition to the great information on our website, perhaps we could ask supporters or alumni to also post:

“Did you know that WIU has the highest percentage for the passage rate on the CPA exam among all of Illinois’ public Universities?”

Another person could post “Did you know that WIU nursing students have a 100% passage rate on their certification exams?”

In fact, all of the positive things President Thomas highlighted could be used in a post. As I listened to President Thomas, I was impressed by all of these facts. I think the general public would be too, but my point is simply that not all people access the WIU website. This is just an idea as we work to spread the word about the good reasons students should choose WIU. I am dismayed when I read my local papers and see students going to Missouri colleges for nursing, AG Business, and supply chain degrees. If I could, I would like to call each of them and suggest

they look at a closer and equally if not better option at WIU. Just some thoughts as we work to boost enrollment.

I shared this message so that all will know we are open to feedback and suggestions, and we can think outside the box and try different things that are little to no cost that positively promote WIU in non-conventional ways to have the best impact on our region for students who would benefit from a high quality education in, as we say, their own backyard. Thank you, and Jason and I can answer questions you may have.



The President's Executive Institute (PEI) at Western Illinois University works to ensure the University is the partner of choice for advancing social responsibility and providing connections between WIU and external communities.

PEI Goals

I. Stabilize Enrollment

A. Host Education Summits with education leaders

1. In FY18, 12 Education Summits held in seven communities throughout the state, with 92 education leaders participating.
 - (a) As a result, additional campus visits were scheduled for more than 509 students from Peoria, St. Louis, Bloomington/Normal, Lombard, Farmington, Moline, Davenport, Rock Island, United Township, Fulton, Orion, Black Hawk and Sauk Valley Community Colleges.
 - (b) A College of Fine Arts and Communication Day and Law Enforcement and Justice Administration Open House brought an additional 260 students from Iowa, Illinois and Missouri high schools and community colleges.
2. In FY19 (to date) three Education Summits have been scheduled, including a Law Enforcement and Justice Administration summit in Quincy and Educational Leadership summits in Moline and Peoria.

B. Create high school dual enrollment programs and enhance high school student attendance opportunities

1. FY18: Dual enrollment students increased to 41 compared to 19 in FY17.
2. FY19: Seven dual enrollment courses offered at two Illinois high schools on campus and online.
3. FY19: Dual enrollment programs under consideration or development with nine additional Illinois and Iowa high schools.
4. FY19: First students enrolled in agriculture classes at WIU-QC for free due to \$100,000 grant received from Moline Foundation.

C. Enhance community college partnerships

1. In FY18, 25 meetings were held with community colleges throughout Illinois and Iowa.
 - (a) WIU now has institutional agreements with 18 community colleges.
 - (b) WIU now has a total of 91 articulation agreements with 18 community colleges.

D. Increase military/veterans outreach

1. In FY18, completed recruitment visits with nine military bases and attended nine recruiting events at the following locations:
 - (a) Rock Island Arsenal, Scott AF Base and Ft. Leonard Wood, Wright-Patterson AF Base, Whitman AF Base, Bliss, Ft. Leavenworth, Jacksonville Naval Air Station, Marine Air Corps Station, Mid-South Naval Base, Naval Base Kitsa, U.S. Naval Academy and at four conferences.
2. Created new military recruitment publications.
3. Received Base Housing Allowance for Quad Cities campus.
4. Adopted federal tuition assistance levels for all military personnel.



President Thomas has served as an executive board member on the Council of Fellows for the American Council of Education.

II. Support Community & Economic Development (CED)

A. Host CED Summits with community leaders

1. In FY18, seven CED Summits were held in six communities throughout the state of Illinois, with 54 participants.

B. Promote WIU's Illinois Institute for Rural Affairs (IIRA)

1. In FY18, the annual Rural Community Economic Development Conference was hosted, with 261 attendees, including mayors, elected officials, state agency representatives, farmers and business owners.
2. In FY18, the IIRA facilitated 109 strategic planning sessions in nine Illinois communities.
3. The Small Business Development Center created/retained 497 jobs and provided access to \$1 million in debt and equity loans.
4. The International Trade Center created/retained 14 jobs, served 82 clients and assisted with \$20.8 million in export sales.
5. Received grant to establish a Procurement Technical Assistance Center in the Quad Cities.

C. Establish Creating Entrepreneurial Opportunities (CEO) program for high achieving students

1. Macomb and Moline programs in development, with inquiries from other communities.

D. Continue legislative forums

1. Continuing our work with legislative leaders to ensure fair and predictable funding for Western Illinois University.
2. Hosted nine elected officials, including Illinois' governor and lieutenant governor, on both campuses for University updates.
3. Hosted a Springfield Alumni and Friends Legislative Reception.



Becky Paulsen, director of Business Engagement and Outreach with vice president for Quad Cities and Planning, Joseph Rives

III. Engage External Organizations

A. Training and outreach for organizations and industries/addressing employer needs

1. In FY18, responded to employer and community needs with new programs, internships, sponsored credit and other corporate training programs.
2. Hosted teacher recruitment fair with 33 schools present and 67 students attending.
3. In FY18, the number of external advisory boards working with WIU programs increased from 18 to 21.
4. In FY18, WIU School of Law Enforcement and Justice Administration worked with the Illinois Department of Corrections for undergraduate degree completion opportunities for correctional officers.

B. Encourage use of employee tuition assistance programs

1. FY18, 40 participants in employee tuition waiver programs enrolled at WIU, totaling \$63,119 in tuition payments to the University.
2. FY18, 10 sponsored credit courses were offered to three cohorts, totaling \$136,255 in tuition payments to the University.

C. Increase internship opportunities

1. In FY18, 844 students participated in internships, 99 students participated in student-teaching assignments, along with many students who participated in self-guided work experience opportunities for credit.

D. Host Alumni Summits

1. In FY18, Alumni Summits have been held in Quincy, Rockford, Savanna, Springfield and Decatur (IL) and Phoenix (AZ) with 29 participants.

E. Generated over \$1.9 million in grants and donations during FY18

Become engaged or for more information, contact:

Joseph Rives, vice president for Quad Cities and Planning, at J-Rives@wiu.edu or (309) 762-8843

Becky Paulsen, director of Business Engagement and Outreach, at B-Paulsen@wiu.edu or (309) 298-2442



Low Enrolled Program Information

August 24, 2018



WESTERN
ILLINOIS
UNIVERSITY

Terms/Metrics (3 year averages):

Bachelor's level programs:

Enrollment: Less than 40 majors, and

Graduation: Less than 9 degrees conferred

Master's level programs:

Enrollment: Less than 10 majors, and

Graduation: Less than 5 degrees conferred

Doctoral level programs:

Enrollment: Less than 10 majors, and

Graduation: Less than 2 degree conferred

Degree	Enrollment 2015	Enrollment 2016	Enrollment 2017	Avg 3 Yr Enrollment	Avg 3 Yr Degrees Conferred
Anthropology	15	13	20	16	5
Art (BFA)	11	12	7	10	4
Economics (includes BA, BB, Pre)	51	43	27	40	14
Bilingual/English as a Second Language	9	9	11	10	2
Clinical Laboratory Science	6	11	14	10	0
Dietetics (includes Pre)	5	33	39	26	3
Emergency Management	30	33	30	31	11
Foreign Languages & Cultures*	10	18	22	17	2
French Education	1	0	2	1	0
Geography & Geo Info Science	14	11	9	11	6
Geology	35	25	17	26	11
Hospitality Management	2	16	23	14	0
Interdisciplinary Studies B.A.	11	5	3	3	4
Interdisciplinary Studies B.S.	9	5	6	7	2
Mathematics	31	24	22	26	9
Meteorology	36	26	20	27	7
Musical Theatre	29	28	27	28	8
Nutrition & Foodservice Management	1	0	2	1	0
Physics	26	21	16	21	6
Pre-Veterinary Medicine	17	16	2	12	0
Public Health	19	27	24	23	4
Spanish Education	8	8	9	8	0

* Inclusion of 2nd Majors meets the enrollment/graduation threshold

LOW ENROLLED GRADUATE PROGRAMS

	Enrollment 2015	Enrollment 2016	Enrollment 2017	Avg 3 Yr Enrollment	Avg 3 Yr Degrees Conferred
Liberal Arts & Sciences	4	6	4	5	5
Environmental Science, Ph. D.	3	7	6	5	No Graduates

LOW ENROLLED POST BACCALAUREATE CERTIFICATES

	2015	2016	2017	3 year Average
PBC in Supply Chain Management	1	7	5	4
Liberal Arts & Sciences	4	6	4	5
PBC in Biology (Zoo & Aquarium Studies)	10	3	5	6
PBC in Educational Technology Specialist	0	3	0	1
Applied Statistics & Decision Analytics	0	0	0	0
PBC in Museum Studies	0	2	1	1
PBC in Online & Distance Learning Development	0	2	0	1
PBC in Technology Integration in Education	0	2	1	1
PBC in Workplace Learning & Performance	0	1	0	0

MAJORS ELIMINATED OR SUSPENDED

	ENDS ON
PRE-CHEMICAL ENGINEERING	20150701
PRE-ARCHITECTURE	20150701
PRE-PHARMACY	20170701
MEDIA AND INSTRUCTIONAL TECHNOLOGY	20170701
FRENCH	20180801
SPANISH	20180801
RELIGIOUS STUDIES	20190601
WOMEN'S STUDIES	20190601
PHILOSOPHY	20190601
AFRICAN AMERICAN STUDIES	20190601
FAMILY AND CONSUMER SCIENCES	20200731
BROADCASTING	20210731
JOURNALISM	20210731
ATHLETIC TRAINING	20210731
APPAREL AND TEXTILE MERCHANDISING	SUSPENDED

MINORS ELIMINATED	ENDS ON
ETHIC	2015070
LEGAL HISTORY	20150701
INTERNATIONAL AGRICULTURE	20150701
STATISTICS	20160701
ENTREPRENEURSHIP	20170701
COMMUNICATION SCIENCES AND DISORDERS	20170701
KINESIOLOGY	20170701
FUNCTIONAL MORPHOLOGY & EVOLUTIONARY ANATOMY	20170701
PHOTOGRAPHIC MEDIA	20170701
WEB DESIGN	20170701
HEALTH SERVICES MANAGEMENT	20170701
URBAN FORESTRY	20170701
COMMUNITY HEALTH	20170701
DIGITAL MEDIA	20170701
GERMAN	20190511
FAMILY AND CONSUMER SCIENCES	20200731
JOURNALISM	20210508
BROADCASTING	20210508
APPAREL AND TEXTILE MERCHANDISING	SUSPENDED

Report 18.8/9

Our Limitations:

- Set Risk Appetite
- Design Risk Management Process
- Perform Operational Duties
- Implement changes
- Direct employees

Internal Auditing Assurance & Consulting Services

Audit Charter

Our Cornerstones:

- Independence
- Objectivity
- Quality
- Service
- Counsel
- Business acumen

Assurance Services / Audits

- Traditional audit
- Objective review
- Examine historical information
- Independent assessment of:
 - Governance
 - Risk management
 - Control processes
- Identify weaknesses, make recommendations for improvement.
- Opinion issued concerning adequacy and effectiveness of internal controls.

Consulting Services

- Advisory services to management
- Focus is on current or planned changes in the organization
- Assists management in proactively identifying risks, best practices, and internal control design.
- Provides advice, information, risks, and considerations relating to:
 - Governance
 - Risk Management
 - Control Processes
- Makes recommendations for improvement.

Areas of focus / Concentration:

- ✓ Achievement of organization's strategic objectives.
- ✓ Reliability and integrity of financial and operational information.
- ✓ **Effectiveness and efficiency** of operations and programs.
- ✓ Safeguarding of assets.
- ✓ Compliance with laws, regulations, policies, procedures, and contracts.

Consulting Services: A Detailed Look

<p><u>Project Identification:</u></p> <ul style="list-style-type: none"> •Management Requests •Internal Auditing identifies new developments, upcoming changes, and significant risks in the organization. •Scan & monitor internal and external environment for emerging issues. 	
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	<p><u>Process:</u></p> <ul style="list-style-type: none"> •Meet with key members of management. •Research and gather information. •Identify potential risks, best practices, current and future processes, areas impacted. •Assess current operating environment and what is needed to implement changes, policies, systems, initiatives. •Provide input, advice, and counsel to management to assist in decision making while addressing linkage to strategic plan, operational changes, risk concerns, efficiency, and compliance. •Monitor and review actions. 	
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