

# **University Advancement**

Office of University Advancement

## **Introduction**

The mission of University Advancement (including Alumni, Banners, and Foundation offices) is to seek outside resources through donations to support the successful education of undergraduate students; to strengthen alumni ties and to encourage lifelong support to the University; to provide community access to arts and humanities programming and education that are unique to this area; and to provide operations assistance to serve faculty/staff, donors, employers, and community members.

**Performance Objective 1 To identify, cultivate, solicit and steward donors whose philanthropic interests match the interest of the University.**

**1 Assessment and Benchmark**

Benchmark: >5% increase in McNeese Foundation endowment every year.

**1.1 Data**

|                                     |          | May<br>2014 | May<br>2015 | May<br>2016 | May<br>2017 | May<br>2018 | 2017-2018<br>% Change |
|-------------------------------------|----------|-------------|-------------|-------------|-------------|-------------|-----------------------|
| In/Out<br>Departmental<br>Funds     | # Gifts  | 4,955       | 5,246       | 4,036       | 4,917       | 4,351       |                       |
|                                     | # Donors | 2,588       | 2,730       | 2,048       | 2,543       | 2,171       |                       |
|                                     | \$       | 3,712,805   | 7,947,620   | 4,101,443   | 3,629,748   | 4,308,983   |                       |
| In/Out Scholarship<br>Funds         | # Gifts  | 53          | 190         | 80          | 43          | 23          |                       |
|                                     | # Donors | 33          | 142         | 43          | 31          | 18          |                       |
|                                     | \$       | 85,590      | 153,059     | 54,101      | 127,876     | 66,855      |                       |
| General University<br>Funds         | # Gifts  | 138         | 144         | 125         | 124         | 160         |                       |
|                                     | # Donors | 61          | 68          | 55          | 56          | 68          |                       |
|                                     | \$       | 63,676      | 97,421      | 108,522     | 59,446      | 179,623     |                       |
| Designated Funds                    | # Gifts  | 205         | 211         | 160         | 199         | 174         |                       |
|                                     | # Donors | 77          | 76          | 58          | 66          | 64          |                       |
|                                     | \$       | 127,998     | 102,890     | 457,713     | 62,166      | 76,574      |                       |
| Unfunded<br>Professorships          | # Gifts  | 3           | 44          | 31          | 66          | 28          |                       |
|                                     | # Donors | 2           | 12          | 10          | 26          | 2           |                       |
|                                     | \$       | 135,000     | 656,571     | 609,882     | 439,158     | 5,850       |                       |
| Funded<br>Professorships            | # Gifts  | 2           | 0           | 4           | 5           | 7           |                       |
|                                     | # Donors | 2           | 0           | 1           | 1           | 1           |                       |
|                                     | \$       | 80,000      | 0           | 160,000     | 200,000     | 280,000     |                       |
| Endowed<br>Academic<br>Scholarships | # Gifts  | 745         | 758         | 589         | 732         | 723         |                       |
|                                     | # Donors | 324         | 289         | 231         | 339         | 320         |                       |
|                                     | \$       | 2,134,462   | 1,499,557   | 2,291,312   | 1,421,896   | 1,711,773   |                       |
| Endowed Athletic<br>Scholarships    | # Gifts  | 52          | 37          | 34          | 28          | 62          |                       |
|                                     | # Donors | 24          | 20          | 20          | 16          | 41          |                       |
|                                     | \$       | 56,901      | 98,681      | 104,960     | 69,084      | 130,436     |                       |
| Endowed Athletic<br>General Funds   | # Gifts  | 10          | 19          | 13          | 2           | 5           |                       |
|                                     | # Donors | 1           | 10          | 13          | 2           | 5           |                       |
|                                     | \$       | 893         | 1,612       | 1,148       | 200         | 400         |                       |
| Total Endowed<br>Funds              | \$       |             |             |             | 2,251,980   | 2,384,656   | 5.9%                  |

Time Period Reflected: For reporting purposes, the dates used to represent "May 2018" are 5/1/17 to 5/31/18.

|                        |         | May<br>2019 | May<br>2020 | May<br>2021 | May<br>2022 | May<br>2023 | 2018-2019<br>% Change |
|------------------------|---------|-------------|-------------|-------------|-------------|-------------|-----------------------|
| In/Out<br>Departmental | # Gifts | 3,985       |             |             |             |             |                       |
|                        |         |             |             |             |             |             |                       |

|                                |          |           |  |  |  |  |        |
|--------------------------------|----------|-----------|--|--|--|--|--------|
| Funds                          | # Donors | 1,813     |  |  |  |  |        |
|                                | \$       | 4,320,195 |  |  |  |  |        |
| In/Out Scholarship Funds       | # Gifts  | 153       |  |  |  |  |        |
|                                | # Donors | 142       |  |  |  |  |        |
|                                | \$       | 81,198    |  |  |  |  |        |
| General University Funds       | # Gifts  | 130       |  |  |  |  |        |
|                                | # Donors | 48        |  |  |  |  |        |
|                                | \$       | 167,318   |  |  |  |  |        |
| Designated Funds               | # Gifts  | 165       |  |  |  |  |        |
|                                | # Donors | 49        |  |  |  |  |        |
|                                | \$       | 109,500   |  |  |  |  |        |
| Unfunded Professorships        | # Gifts  | 43        |  |  |  |  |        |
|                                | # Donors | 5         |  |  |  |  |        |
|                                | \$       | 286,050   |  |  |  |  |        |
| Funded Professorships          | # Gifts  | 6         |  |  |  |  |        |
|                                | # Donors | 1         |  |  |  |  |        |
|                                | \$       | 240,000   |  |  |  |  |        |
| Endowed Academic Scholarships  | # Gifts  | 866       |  |  |  |  |        |
|                                | # Donors | 379       |  |  |  |  |        |
|                                | \$       | 1,842,116 |  |  |  |  |        |
| Endowed Athletic Scholarships  | # Gifts  | 78        |  |  |  |  |        |
|                                | # Donors | 52        |  |  |  |  |        |
|                                | \$       | 159,886   |  |  |  |  |        |
| Endowed Athletic General Funds | # Gifts  | 12        |  |  |  |  |        |
|                                | # Donors | 1         |  |  |  |  |        |
|                                | \$       | 1,603     |  |  |  |  |        |
| Total Endowed Funds            | \$       | 2,806,473 |  |  |  |  | 17.69% |

### 1.1.1 Analysis of Data and Plan for Continuous Improvement

2017-2018:

- There was an increase in endowments from May 2017-May 2018 of 5.9%.
- We will increase our marketing efforts of endowed scholarships in an effort to continually increase endowment.
- We will begin educating the community on the importance of faculty development endowments.
- Publish an updated informational booklet with extensive detail on the different types of endowments.

2018-2019:

- There was increase in endowments from May 2018-May 2019 of 17.69%.
- The increase was partially due to the "15 Gets You 20" scholarship initiative. If a donor gives \$15,000 to the endowed scholarship program, the Foundation will match it with \$5,000.

- We will continue to increase our marketing efforts of endowed scholarships in an effort to continually increase endowment.
- Continue distribution of the new marketing piece that includes extensive detail on the different types of endowments.

**Performance Objective 2 To market foundation activities to campus personnel, community members, and other constituents.**

**1 Assessment and Benchmark**

Benchmark: >5 civic and/or professional organization memberships by staff.

**1.1 Data**

| Fiscal Year | # of civic/professional organization memberships held by staff |
|-------------|--|
| 2013-2014   | 7  |
| 2014-2015   | 6  |
| 2015-2016   | 5  |
| 2016-2017   | 5  |
| 2017-2018   | 5  |
| 2018-2019   | 5  |

2017-2018:

Memberships include:

- CASE (RR, JL, MN)
- AFP-LA, Southwest Chapter (JL)
- Greater Lake Charles Rotary (JL)
- NACUBO (RR)
- LAMP Board (RR)

Civic and/or professional organization activity:

- GLCRC Program Chair and Board member (JL).
- Serve as AFP President (JL) and NPD committee member (JL).
- Attended the LAMP Conference and meetings in Baton Rouge (RR).

2018-2019:

Memberships include:

- CASE (RR, JL, MN)
- AFP-LA, Southwest Chapter (JL)
- Greater Lake Charles Rotary (JL)
- NACUBO (RR)
- LAMP Board (RR)

Civic and/or professional organization activity:

- GLCRC Board member (JL).
- Serve as AFP President (JL) and NPD committee member (JL).
- Attended the LAMP Conference and meetings in Baton Rouge (RR).

**1.1.1 Analysis of Data and Plan for Continuous Improvement**

2017-2018:

Analysis and plan for 2018-2019:

- Our staff participated in five civic and/or professional organizations.
- Increase awareness of the McNeese Foundation by providing organizations with special presentations by the Foundation staff promoting McNeese and the Foundation.
- Provide a listing of diverse University guest speakers to community organizations upon request, i.e., If the Greater Lake Charles Rotary Club is requesting a speaker with knowledge in a specific area, we provide them

- with a list of campus professionals.
- Assist in the funding of guest speakers brought to the campus community.

Continue memberships in:

- GLCRC (JL); Membership cost = \$1,000.
- CASE (MN, JL, RR); Membership cost = \$475/member.
- NACUBO and LAMP (RR); Membership cost= \$1,516 (no dues required for LAMP).
- AFP (JL); Membership cost = \$275.

2018-2019:

Analysis and plan for 2019-2020:

- Our staff participated in five civic and/or professional organizations.
- Continue to increase awareness of the McNeese Foundation by providing organizations with special presentations by the Foundation staff promoting McNeese and the Foundation.
- Continue to provide a listing of diverse University guest speakers to community organizations upon request. (i.e., if the Greater Lake Charles Rotary Club is requesting a speaker with knowledge in a specific area, we provide them with a list of campus professionals).
- Seek out new possibilities for professional and civic growth.

Continue memberships in:

- GLCRC (JL); Membership cost = \$1,000.
- CASE (MN, JL, RR); Membership cost = \$481/member.
- NACUBO and LAMP (RR); Membership cost= \$1,561 (no dues required for LAMP).
- AFP (JL); Membership cost = \$275.

**2 Assessment and Benchmark**

Benchmark:  $\geq 5\%$  increase in Outrider (McNeese Retiree Association) memberships.

**2.1 Data**

| Fiscal Year | Outrider memberships | Change in membership from previous year | % change from previous year |
|-------------|----------------------|---|-----------------------------|
| 2013-2014   | 131                  | -1                                      | -                           |
| 2014-2015   | 136                  | +5                                      | +3.82%                      |
| 2015-2016   | 148                  | +12                                     | +8.82%                      |
| 2016-2017   | 158                  | +10                                     | +6.76%                      |
| 2017-2018   | 131                  | -27                                     | -17.09%                     |
| 2018-2019   | 134                  | +3                                      | +2.29%                      |

**2.1.1 Analysis of Data and Plan for Continuous Improvement**

2017-2018:

- Membership decreased in 2017-2018.
- Members from 2017-2018 passed away resulting in a decrease in membership.
- Previous members have had health issues and did not renew.
- Some members moved out of state and did not renew.

Plan for 2018-2019:

- Retain current members and seek ways to engage both continuing and new members.
- Continue summer recruitment letter with follow-up letter signed by board members to urge joining/rejoining.
- Contact lapsed members and ask to renew their membership.
- Contact McNeese employees upon eligibility; once separation notice is sent.

2018-2019:

- Membership increased by 3 in 2018-2019.
- The benchmark of  $\geq 5\%$  in membership was not met.
- An increase in retirees for the year may have played a part in the increase in membership.

- Contacted lapsed members and asked to renew their membership.

Plan for 2019-2020:

- Retain current members and seek ways to engage both continuing and new members.
- Continue summer recruitment letter with follow-up letter signed by board members to urge joining/rejoining.
- Continue to contact lapsed members and ask to renew their membership.
- Continue to contact McNeese employees upon eligibility or once separation notice is sent.
- Change benchmark to  $\geq 3\%$  rather than  $\geq 5\%$ .

### 3 Assessment and Benchmark

Benchmark:  $\geq 2$  publications ( *Leaf and Legacy*, *Dispatch from the Outriders*, and *Get Involved* brochure) created and/or disseminated with target audience being current and prospective donors and other constituents.

#### 3.1 Data

| Fiscal Year | # of publications |
|-------------|-------------------|
| 2013-2014   | 6                 |
| 2014-2015   | 5                 |
| 2015-2016   | 3                 |
| 2016-2017   | 3                 |
| 2017-2018   | 3                 |
| 2018-2019   | 6                 |

#### 3.1.1 Analysis of Data and Plan for Continuous Improvement

2017-2018:

- Three publications in 2017-2018.
- Two *Dispatch from the Outriders* newsletters sent to 80 households in both fall 2017 and spring 2018.
- *Get Involved* brochure is disseminated as needed or requested by office staff.
- Increase publications if budget allows.
- Market through advertisement in local publications including the American Press and Thrive.

2018-2019:

- Six publications in 2018-2019.
- Increased publications by four.
- Two *Dispatch from the Outriders* newsletters sent to 92 households in both fall 2018 and spring 2019.
- *Get Involved* brochure disseminated as needed or requested by office staff.
- Revised and updated the 1939 Living Oak Society brochure. Brochure mailed to 102 households as part of the Professorship mailing and upon request.
- "15 Gets You 20" scholarship advertisement in Thrive and Lakinappe.
- Charitable contributions through corporate matches, AmazonSmile and Kroger Community Rewards marketing piece added to thank you mailings.

Plan for 2019-2020:

- If budgets allows, maintain publication level and possibly renew and refresh marketing pieces.
- Change benchmark to  $\geq 3$  publications rather than  $\geq 2$ .
- Continue to insert charitable contributions piece in thank you mailings.
- Continue Outriders newsletters.
- Continue *Get Involved* mailings.