



University Advancement

#5 Plan cycle - 5
Plan cycle 2019/2020
7/1/19 - 6/30/20

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 2014	May 2015	May 2016	May 2017	May 2018
In/Out Departmental 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 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 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 Professorships	# Gifts	3	44	31	66	28
	# Donors	2	12	10	26	2
	\$	135,000	656,571	609,882	439,158	5,850
Funded Professorships	# Gifts	2	0	4	5	7
	# Donors	2	0	1	1	1
	\$	80,000	0	160,000	200,000	280,000
Endowed Academic 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 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 General Funds	# Gifts	10	19	13	2	5
	# Donors	1	10	13	2	5
	\$	893	1,612	1,148	200	400
Total Endowed Funds	\$				2,251,980	2,384,656

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

		May 2019	May 2020	May 2021	May 2022	May 2023
In/Out Departmental Funds	# Gifts	3,985	3,536			
	# Donors	1,813	1,721			
	\$	4,320,195	12,757,787			

In/Out Scholarship Funds	# Gifts	153	59			
	# Donors	142	31			
	\$	81,198	26,800			
General University Funds	# Gifts	130	148			
	# Donors	48	53			
	\$	167,318	83,667			
Designated Funds	# Gifts	165	166			
	# Donors	49	52			
	\$	109,500	60,194			
Unfunded Professorships	# Gifts	43	43			
	# Donors	5	7			
	\$	286,050	445,613			
Funded Professorships	# Gifts	6	5			
	# Donors	1	1			
	\$	240,000	200,000			
Endowed Academic Scholarships	# Gifts	866	736			
	# Donors	379	276			
	\$	1,842,116	3,350,264			
Endowed Athletic Scholarships	# Gifts	78	34			
	# Donors	52	18			
	\$	159,886	6,537			
Endowed Athletic General Funds	# Gifts	12	13			
	# Donors	1	1			
	\$	1,603	5,490			
Total Endowed Funds	\$	2,806,473	4,151,765			

Percent Change in Total Endowed Funds

Year	% Change
2017-2018	5.9%
2018-2019	17.69%
2019-2020	7.94%

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.

2019-2020:

- There was an increase in endowments from May 2019-May 2020 of 7.94%.
- The increase was due to the "15 Gets You 20" initiative. If a donor donates \$15,000 to an endowed scholarship program, the Foundation will match it with \$5,000.
- We will continue to educate the community on the importance of endowments focusing on scholarships, faculty development and departmental needs.
- We will continue focusing on new scholarships to increase the enrollment efforts.

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
2019-2020	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).

2019-2020:

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:

- 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.

2019-2020:

Analysis and plan for 2020-2021:

- 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.
- The new Vice President will visit different organizations throughout the year introducing himself and educating people about the McNeese Foundation.
- We will reach out to the campus employees to promote payroll deductions options available.

Continue memberships in:

- GLCRC (JL); Membership cost = \$1,000.
- CASE (MN, JL, RR); Membership cost = \$472/member.
- NACUBO and LAMP (RR); Membership cost= \$1,561 (no dues required for LAMP).
- AFP (JL); Membership cost = \$305.

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%
2019-2020	132	-2	-1.49%

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 $\geq 5\%$.

2019-2020 Analysis:

- Membership decreased by two this year.
- The benchmark of $\geq 3\%$ in membership was not met.
- The decrease may have been caused by the four retirees that passed away this year.

Plan for 2020-2021:

- 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.

3 Assessment and Benchmark

Benchmark: >3 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.

Prior to 2019-2020 the benchmark was ≥ 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

	# of
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Fiscal Year	publications
2013-2014	6
2014-2015	5
2015-2016	3
2016-2017	3
2017-2018	3
2018-2019	6
2019-2020	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 Laginappe.
- 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 ≥ 3 publications rather than ≥ 2 .
- Continue to insert charitable contributions piece in thank you mailings.
- Continue Outriders newsletters.
- Continue *Get Involved* mailings.

2019-2020 Analysis:

- Six publications in 2019-2020.
- Same amount as last year, no change.
- Two *Dispatch from the Outriders* newsletters sent to 90 households in both fall 2019 and spring 2020.
- *Get Involved* brochure disseminated as needed or requested by office staff.
- MyMcNeese Foundation piece was disseminated throughout the year.
- "15 Gets You 20" scholarship piece continued.
- Charitable contributions through corporate matches, AmazonSmile and Kroger Community Rewards marketing piece continued.
- Scholarship endowment/cost piece was updated and inserted into the Get Involved booklet.

Plan for 2020-2021:

- Change this assessment goal to include online marketing.
- Publications are becoming obsolete and less mailings are done on a regular basis.
- Revise assessment to include more online types of marketing.
- Utilize social media and our website to market the Foundation.
- Utilize social media and our website to market AmazonSmile and the Kroger Community Rewards.
- Send more articles and announcements to be included in the weekly E-newsletter.