University Advancement

#6 Plan cycle - 6
Plan cycle 2020/2021
7/1/20 - 6/30/21
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

<table>
<thead>
<tr>
<th></th>
<th>May 2014</th>
<th>May 2015</th>
<th>May 2016</th>
<th>May 2017</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td>In/Out Departmental Funds</td>
<td># Gifts</td>
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<td># Donors</td>
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<td>80</td>
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<tr>
<td></td>
<td># Donors</td>
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<td>43</td>
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<td>$</td>
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<td>153,059</td>
<td>54,101</td>
<td>127,876</td>
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<tr>
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<td>144</td>
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<td># Donors</td>
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<td>58</td>
<td>66</td>
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<td>Unfunded Professorships</td>
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<td>44</td>
<td>31</td>
<td>66</td>
</tr>
<tr>
<td></td>
<td># Donors</td>
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<td>$</td>
<td>135,000</td>
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<td>$</td>
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<td>0</td>
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<td>Endowed Academic Scholarships</td>
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<td>758</td>
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<td></td>
<td># Donors</td>
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<td>231</td>
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<td>Endowed Athletic Scholarships</td>
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<td>37</td>
<td>34</td>
<td>28</td>
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<tr>
<td></td>
<td># Donors</td>
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<td>20</td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>$</td>
<td>56,901</td>
<td>98,681</td>
<td>104,960</td>
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<tr>
<td>Endowed Athletic General Funds</td>
<td># Gifts</td>
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<td>19</td>
<td>13</td>
<td>2</td>
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<tr>
<td></td>
<td># Donors</td>
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<td>2</td>
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<td>$</td>
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<td></td>
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Time Period Reflected: For reporting purposes, the dates used to represent "May 2018" are 5/1/17 to 5/31/18.
<table>
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<tr>
<th>Fund Type</th>
<th># Gifts</th>
<th># Donors</th>
<th>$</th>
<th># Gifts</th>
<th># Donors</th>
<th>$</th>
<th># Gifts</th>
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<th>$</th>
<th># Gifts</th>
<th># Donors</th>
<th>$</th>
<th># Gifts</th>
<th># Donors</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>In/Out Scholarship Funds</td>
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<td>142</td>
<td>81,198</td>
<td>59</td>
<td>31</td>
<td>26,800</td>
<td>82</td>
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<td>General University Funds</td>
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<td>113</td>
<td>35</td>
<td>23,198</td>
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<tr>
<td>Designated Funds</td>
<td>165</td>
<td>49</td>
<td>109,500</td>
<td>166</td>
<td>52</td>
<td>60,194</td>
<td>148</td>
<td>40</td>
<td>57,669</td>
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<tr>
<td>Unfunded Professorships</td>
<td>165</td>
<td>49</td>
<td>109,500</td>
<td>166</td>
<td>52</td>
<td>60,194</td>
<td>148</td>
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<td>200,000</td>
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<td>Endowed Academic Scholarships</td>
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<td>3,350,264</td>
<td>666</td>
<td>285</td>
<td>5,315,236</td>
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<tr>
<td>Endowed Athletic Scholarships</td>
<td>78</td>
<td>52</td>
<td>159,886</td>
<td>34</td>
<td>18</td>
<td>6,537</td>
<td>28</td>
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</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>% Change</th>
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</thead>
<tbody>
<tr>
<td>2017-2018</td>
<td>5.9%</td>
</tr>
<tr>
<td>2018-2019</td>
<td>17.69%</td>
</tr>
<tr>
<td>2019-2020</td>
<td>47.9%</td>
</tr>
<tr>
<td>2020-2021</td>
<td>127%</td>
</tr>
</tbody>
</table>

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 47.9%.
• 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.

2020-2021:
• There was an increase in endowments from May 2020-May 2021 of 127%.
• The increase was due to a large planned gift that was realized. It also included the Hurricane Relief Fundraising.
• We will continue focusing on scholarships to increase the enrollment efforts.
• We will educate the community on the McNeese Athletic Foundation (MAF) in efforts to grow athletic fundraising.
• We will continue to educate the community on the importance of McNeese focusing on scholarships, faculty development, departmental needs and athletics.

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

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th># of civic/professional organization memberships held by staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-2014</td>
<td>7</td>
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<tr>
<td>2014-2015</td>
<td>6</td>
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<tr>
<td>2015-2016</td>
<td>5</td>
</tr>
<tr>
<td>2016-2017</td>
<td>5</td>
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<tr>
<td>2017-2018</td>
<td>5</td>
</tr>
<tr>
<td>2018-2019</td>
<td>5</td>
</tr>
</tbody>
</table>
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, WR)
- 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).

2020-2021:
Memberships include:
  - CASE (RR, JL, MN)
  - AFP-LA, Southwest Chapter (JL)
  - Greater Lake Charles Rotary (JL)
  - NACUBO (RR)
  - LAMP Board (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).
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.

2020-2021:
Analysis and plan for 2021-2022:
- 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, WR); Membership cost = $655/member.
- AFP (JL); Membership cost = $305.

2 Assessment and Benchmark

Benchmark: ≥5% increase in Outrider (McNeese Retiree Association) memberships.

2.1 Data

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Outrider memberships</th>
<th>Change in membership from previous year</th>
<th>% change from previous year</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-2014</td>
<td>131</td>
<td>-1</td>
<td>-</td>
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<tr>
<td>2014-2015</td>
<td>136</td>
<td>+5</td>
<td>+3.82%</td>
</tr>
<tr>
<td>2015-2016</td>
<td>148</td>
<td>+12</td>
<td>+8.82%</td>
</tr>
<tr>
<td>2016-2017</td>
<td>158</td>
<td>+10</td>
<td>+6.76%</td>
</tr>
<tr>
<td>2017-2018</td>
<td>131</td>
<td>-27</td>
<td>-17.09%</td>
</tr>
</tbody>
</table>
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.

2020-2021:
- Membership decreased by nine this year.
- The benchmark of $\geq 3\%$ in membership was not met.
- The decrease may have been caused by COVID 19 and the two hurricanes.
Plan for 2021-2022

Membership decreased slightly from the previous year. This can be attributed to the COVID-19 pandemic, former Outriders members passing away and Hurricane Laura impacting our area August 27, 2020 which is a peak time for eligible persons to join. Also, Hurricane Delta hit October 5, 2020, which is another peak time for those members mailed a second recruitment letter to join.

While continuing to deal with hurricane recovery and the COVID-19 pandemic, we plan to:

- 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

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th># of publications</th>
</tr>
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<tbody>
<tr>
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<td>6</td>
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<tr>
<td>2014-2015</td>
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<td>2019-2020</td>
<td>6</td>
</tr>
<tr>
<td>2020-2021</td>
<td>4</td>
</tr>
</tbody>
</table>

3.1.1 Analysis of Data and Plan for Continuous Improvement

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:
- 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:
- 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.

2020-2021 Analysis:
- Four publications in 2020-2021.
- 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.
- Online marketing included Hurricane Relief geofencing provided by The Brandgineers.
- Due to COVID 19 and two hurricanes, we were not able to interact and create new publications.

Plan for 2020-2021:
- We will include more online marketing.
- Continue to utilize social media and our website to market the Foundation.
- Continue to utilize social media and our website to market AmazonSmile and the Kroger Community Rewards.
- Continue to send more articles and announcements to be included in the weekly E-newsletter.