

Assessment Cycle 2018 – 2019

External Affairs

Division or Department: University Advancement

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Northwestern State University Mission:

Northwestern State University is a responsive, Student-oriented institution that is committed to the creation, dissemination, and acquisition of knowledge through teaching, research, and service. The University maintains as its highest priority excellence in teaching in graduate and undergraduate programs. Northwestern State University prepares its Students to become productive members of society and promotes economic development and improvements in the quality of life of the citizens in its region.

External Affairs Mission:

External Affairs is a diverse segment of the university that includes Athletics, Alumni, and Development, Wellness, Recreation and Activities Center (WRAC); The Robert Wilson Recreation Complex; NSU Press/Publications, Marketing and Branding, NSU TV, University Printing, the News Bureau, Photo Services and Sports Information. These offices provide services to promote a positive image for the university, maintain relationships with the media and engage alumni, prospective students, donors and government and civic leaders.

The Vice President for External Affairs supervises the units within his division, coordinates governmental relations for the University and directs numerous endeavors related to public relations, community service, promotions, marketing and institutional advancement. He works closely with the president and other vice presidents to implement university policies and procedures.

Each unit of External Affairs works the University community-at-large to recognize students and faculty, create awareness of news, programs, and services on campus and engage the community outside NSU by bringing them to campus for athletic, academic and cultural events and to utilize the WRAC and the Rec Complex. These units play an important role in showcasing the university and impacting enrollment, fundraising, alumni and community involvement, and other goals. The Division is directly involved in promoting a learning-centered environment, improving retention and graduation rates and maintaining a positive, student-oriented atmosphere.

University Advancement Mission:

University Advancement includes Alumni and Development, the arms of the institution that reach out to alumni and community partners. The units' main goals are focused on fundraising, alumni relations, and institutional advancement. Personnel in University Advancement are responsible for directing programs and other functions

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related to fundraising, engaging alumni, and related activities. The Assistant Vice President of External Affairs for Advancement also serves as the executive director of the NSU Foundation and NSU Alumni Association serving as a liaison between the non-profit entity and the university. The AVPEAA manages the university's fundraising, identifying resources commensurate with university needs and priorities and solicits applications for corporate and foundation grants, estate planning and other financial planning, maintaining ties with key external constituents. The framework of this unit is promulgated through promoting the advancement of academic excellence by developing coalition among alumni, students, friends and the university community while supporting the university's traditions, values, and future.

Methodology: The assessment process includes:

- (1) Data from assessment tools (both direct – indirect, quantitative and qualitative) are collected and returned to the executive director;
- (2) The executive director will analyze the data to determine whether the applicable outcomes are met:
- (3) Results from the assessment will be discussed with the appropriate staff;
- (4) Individual meetings will be held with staff as required (show cause);
- (5) The executive director, in consultation with the staff and senior leadership, will determine propose changes to measurable outcomes, assessment tools for the next assessment period and, where needed, service changes.

Purpose:

To support and promote Northwestern State to alumni and community stakeholders, to raise funds to support the university, programming, scholarship and support for faculty and to increase engagement between the university, its alumni, and stakeholders.

University Advancement

Service Outcomes:

SO 1

Ensure private funding is available to augment state operating funds in order to support faculty, staff, students, programs and capital projects needed to advance the institutional mission. These resources are acquired in the forms of endowment contributions and annual recurring support as specified for restricted and unrestricted use.

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Measure 1.1

The NSU Foundation will increasingly secure private funding for the institution. The NSU Foundation keeps accounting records audited annually by a third party firm. These records are reviewed on an ongoing basis to monitor progress toward annual increases in yield. The target is to increase private dollars secured by 15%.

Finding. The target was not met.

Analysis. In 2017-2018 the target was not met. Although an increase of 8% was realized, the target was 15%. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to place focus on increasing the number of individual donors and restructuring staff responsibilities related to fundraising.

Based on these changes, in 2018-2019 the target was not met. Although an increase of 9.7% was realized, the target was 15%. Changes implemented impacted fundraising, but not at the level required to meet the target. Increasing the number of individual contributors assisted in securing more gifts, but the sum of the gifts did not grow at the targeted rate. Staff responsibilities were restructured, and successful gains were realized, however turnover caused a lapse in performance.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 changes will be implemented to place focus on major gifts and restructure fundraising responsibilities. Vacant staff positions will be filled.

Measure 1.2

The NSU Foundation will track effectiveness through proven development strategies. The NSU Foundation keeps records in the *Agilon* constituent management system allowing for the monitoring of a prospect management cycle composed of the 4 professional phases of the development cycle: identification, cultivation, solicitation, and stewardship. The target is for each development officer to cycle 50 prospects annually.

Finding. The target was met.

Analysis: In 2017-2018 the target was met. Development officers cycled an average of 120 prospects annually. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to assign additional prospects to each manager.

Based on these changes, in 2018-2019 the target was met. Development officers cycled an average of 149 prospects annually. The addition of prospects to each manager increased the number of total prospects contacted resulting in a higher conversion rate.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 the NSU Foundation will continue the use of the tracking system and further analyze results. It is recommended that development officers continue to

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participate in monthly webinars and attend regional conferences focused on expanded use of the tracking system and prospect identification strategies.

Measure 1.3

The NSU Foundation will maintain the number of current annual fund donors and increase the number of new annual fund donors. The NSU Foundation keeps records in the *Agilon* constituent management system on the number of individual donors giving on an annual basis. The target is to maintain the current number of individual donors and increase the number of new donors by 10% annually.

Finding. The target was met.

Analysis. In 2017-2018 the target was met. The number of donors giving to the Columns Fund increased from 258 to 331 (28.3%). Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 including an increased focus on unrestricted giving during donor visits.

Based on these changes, in 2018-2019 the target was met. The total number of donors giving to the Columns Fund increased from 331 to 416 (25.7%). Increased focus on unrestricted giving was effective in raising the total number of donors. Donor visits have impacted participation but are limited to the number of staff members dedicated to fundraising.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 marketing efforts need to be analyzed to increase participation beyond donor visits including targeted mailers, social media promotion, email solicitation, and website development. The NSU Foundation will contract with a marketing consultant to analyze strategies to increase participation.

Measure 1.4

The NSU Foundation will utilize a variety of giving vehicles including gifts of cash, transfers of stock, gifts in kind, matching gifts, and estate gifts to maximize avenues of securing diverse resources. The target is to ensure that constituents are informed annually of the range of giving options.

Finding. The target was met.

Analysis. In 2017-2018 the target was met. A variety of giving options were included in the Alumni Columns magazine and highlighted through donor testimonials. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 including an increased focus on estate giving and matching funds.

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Based on these changes, in 2018-2019 the target was met. Over \$500,000 in estate gifts and matching funds was realized during the 18-19 cycle. 3 new estate gifts were established during the 18-19 cycle and \$520,000 in matching funds have been secured for distribution during the 19-20 cycle. Donor testimonials have been highly successful in encouraging other prospects to utilize a range of giving options. Although focused print appeals are expensive and have mostly been discontinued, securing a single large gift could cover the cost and thus justify the investment. The

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 the NSU Foundation will continue to highlight a variety of giving vehicles through existing media including the website and Alumni Columns Magazine. It is recommended that focused print appeals be developed and marketed to target populations.

Sources:

NSUF Accounting Records
NSUF Annual Audited Financials
Alumni Columns Magazine
northwetsernalumni.com
afpnet.org

SO 2

Enhance constituent participation from both alumni and non-alumni supporters in the areas of membership, attendance, affinity efforts, and volunteer endeavors.

Measure 2.1

The NSU Alumni Association will increase membership to support outreach and awareness activities. The target for membership will be a 10 % increase.

Finding. The target was not met.

Analysis. In 2017-2018 the target was met. Membership was separated from the Columns Fund annual giving program and revised at a standard rate. In the first year, membership increased to 1,300 and was greatly enhanced by the PCI alumni directory campaign. Based on the analysis of the 2017-2018 results, and considering the directory campaign would not occur annually, changes were made in 2018-2019 to establish a renewal process and appeal to new members. Staff turnover occurred shortly after the beginning of the 2018-19 fiscal year and the Associate Director of Alumni Affairs position remained vacant through the beginning of the 2019 calendar year.

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Based on these changes, in 2018-2019 the target was not met. Since January 1, 2019, 627 alumni have renewed their membership. To increase membership by 10%, 803 additional memberships need to be sold. A surge in membership was realized during 2018 increasing the annual target. Success attributed to alumni directory sales which occur every 3 years. The absence of alumni directory sales will require strategic marketing to increase membership by the end of the year. Staff positions were filled temporarily, but remain open and need to be filled

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 staff positions need to be filled. The NSU Alumni Association will contract with a marketing consultant to assist with outreach efforts and develop a strategic promotional plan to increase membership.

Measure 2.2

The NSU Alumni Association will increase attendance at alumni socials and chapter gatherings. The NSU Alumni Association maintains records on the number of individuals participating in alumni chapter events and socials. The target for participation will be a 10% increase in attendance.

Finding. The target was not met.

Analysis. In 2017-2018 the target was met. Adding events increased overall attendance, however it was not cost effective. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to dedicate resources to high performing events and remove events that were not cost effective. Staff turnover occurred shortly after the beginning of the 2018-19 fiscal year and the Associate Director of Alumni Affairs position remained vacant through the beginning of the 2019 calendar year.

Based on these changes, in 2018-2019 the target was not met. Annual attendance increased from 6,729 to 6,881 (2.3%) but did not meet the targeted 10% increase. Participation has increased but needs to be expanded to meet the annual target. Several events were removed to increase cost efficiency and need to be replaced with new activities. Staff positions were filled temporarily but remain open and need to be filled.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 staff positions need to be filled. The NSU Alumni Association will contract with a marketing consultant to assist with outreach efforts and develop a strategic promotional plan to increase participation. New events will be added as efficient opportunities are identified.

Measure 2.3

The NSU Alumni Association will increase awareness of fundraising and outreach

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endeavors through social media platforms with a focus on increasing institutional affinity. The NSU Alumni Association maintains social media outlets including *Facebook*, *Twitter*, and *Instagram*. The target is to increase exposure by 10% annually for both *Facebook* “likes” and *Twitter* “followers” and establish an *Instagram* account.

Findings: The target was not met.

Analysis: In 2017-2018 the target was met. Social media exposure increased from 6,507 to 7,757 (19.2 %) users. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to increase staff responsibilities related to social media. Staff turnover occurred shortly after the beginning of the 2018-19 fiscal year and the Associate Director of Alumni Affairs position remained vacant through the beginning of the 2019 calendar year.

Based on these changes, in 2018-2019 the target was not met. Social media exposure increased from 7,757 to 8,173 (5.4%) but did not meet the 10% target. Staff positions were filled temporarily but remain open and need to be filled.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 the NSU Alumni Association will continue the use of social media platforms with a focus on increasing exposure. Additional analytical measures will be utilized to gain insight. It is recommended that opportunities for paid advertisement or sponsored posts on these platforms be utilized to increase engagement. The NSU Alumni Association will contract with a marketing consultant to assist with outreach efforts and develop a strategic promotional plan to increase participation.

Measure 2.4

The NSU Alumni Association will seek support from alumni and non-alumni supporters for volunteer efforts focused on providing opportunities for graduating seniors and alumni seeking employment. The NSU Alumni Association maintains the demoNSUnite.net platform as a medium to achieve this goal. The target is to increase participation by 10%.

Finding. The target was met.

Analysis. In 2017-2018 the target was met. Participation increased from 1,300 to 1,436 (10.4%). Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to extend the contractual agreement for demoNSUnite.net and increase staff responsibilities related to volunteer efforts.

Based on these changes, in 2018-2019 the target was met. Participation increased from 1,436 to 1,602 (11.6%).

Action-Decision or Recommendation. Based on the analysis of the results in 2018-

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2019, in 2019-2020 the NSU Alumni Association staff will continue, through the use of social media and online communications, to promote the demoNSUite.net platform. It is recommended that testimonials of successful users be highlighted in marketing materials to demonstrate the ability of the platform to aid in providing employment opportunities for graduates. The NSU Alumni Association will contract with a marketing consultant to assist with outreach efforts and develop a strategic promotional plan to increase participation.

Measure 2.5

The NSU Alumni Association will increase engagement of non-traditional constituents by focusing on student participation and strategies to appeal to graduates of online programs. The target is to re-establish the NSU Student Alumni Association and send cost effective branded materials to online graduates.

Finding. The target was met.

Analysis: In 2017-2018 the target was met. The NSU Student Alumni Association was re-established with 40 initial members. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to focus on increasing membership by 20% annually.

Based on these changes, in 2018-2019 the target was met. The NSU Student Alumni Association increase membership from 40 to 54 (35%).

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 efforts need to be expanded to promote growth. it is recommended that the NSU Alumni Association has established a special committee to assist with membership efforts.

Measure 2.6

The NSU Alumni Association will increase institutional affinity. The NSU Alumni Association surveys alumni annually using the *Survey Monkey* tool to collect feedback related to overall sentiments towards the institution. The target is to receive 80% positive feedback.

Finding. The target was met.

Analysis. In 2017-2018 the target was met. Survey results revealed over 90% positive feedback exceeding the 80% target. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to better accommodate participants through online engagement tools including event capability and expanded payment methods.

Based on these changes, in 2018-2019 the target was met. Survey results continue to reveal over 90% positive feedback. Positive results are attributed to a myriad of factors

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from the survey including rich tradition, student experience, quality of academic programs, alumni engagement, and career success.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 the NSU Alumni Association will continue to administer post-event surveys and measure affinity.

Sources:

Agilon Constituent Records

Eventbrite Event Management Records

Survey Monkey Survey Results

SO 3

The Office of University Advancement will maintain relationships with government agencies, elected officials and private business to ensure accomplished trends and needs based counterparts are current and effectively advanced.

Measure 3.1

The Office of University Advancement, in consultation with the University of Louisiana System, University President and Vice President of External Affairs, will maintain open lines of communication with elected officials concerning matters of public policy related to the advancement of higher education and the specific regional benefits and needs of the institution. Success is measured through increased communication and dialogue with the institution's regional delegation and corresponding support.

Finding. The target was met.

Analysis. In 2017-2018 the target was met. Increased dialogue with legislators resulted in budget stability and TOPS funding. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to increase efforts further by engaging with state level officials and staff in addition to regularly communicating with legislators.

Based on these changes, in 2018-2019 the target was met. Louisiana's 2019 Regular Legislative Session concluded on June 6th with the first reinvestment in base funding for higher education in a decade. The enrolled version of HB2 of the Regular Legislative Session dedicated \$22.7M for capital outlay projects at NSU including the replacement of Kyser Hall, roof replacement for Fournet Hall, and South Jefferson Street extension. The enrolled version of HB2 also appropriated \$15M for demolition of buildings for higher education systems. Dodd Hall, Prudhomme Hall, and Caddo Hall were included among the buildings listed for demolition at NSU and planning for these projects is currently underway. In addition to appropriations and capital outlay, several legislative measures affecting higher education were also passed during the session including

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textbook affordability, dual enrollment, work-based learning, campus safety, and financial aid.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 direct personal communications with state officials, staff, and legislators concerning key issues will continue. It is recommended that advocacy efforts continue when the legislature is not in session including the hosting of meetings with the regional delegation at NSU's campus to discuss institutional priorities, illustrate the importance of the state's investment in higher education, and showcase NSU's impact on the region.

Measure 3.2

The Office of University Advancement will seek out and secure public-private partnerships to efficiently satisfy the needs of the institution as an alternative to direct support. These symbiotic relationships will be evaluated on individual specific merit. The target is to increase the number of endeavors on an annual basis.

Finding. The target was met.

Analysis. In 2017-2018 the target was met. Public private partnerships were increased from 14 to 56. These partnerships range from funding of faculty/staff positions to articulation and transfer agreements. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to increase focus on revenue generating projects.

Based on these changes, in 2018-2019 the target was met. The NSU Campus Marketplace was placed into operation in 2018 as a real estate investment and unrestricted revenue stream.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 it is recommended that all existing public-private partnerships be reviewed to ensure long term viability and that new partners be identified. The NSU Foundation will established a committee to explore additional real estate investments and revenue sharing opportunities with private partners.

Sources:

Agilon Constituent Records
ticketsheet.ulsystem.edu
demonsunite.net

SO 4

Ensure that dollars raised are invested into the institution in an efficient and effective manner.

Measure 4.1

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The Office of University Advancement will communicate regularly with the offices of University Recruiting, Financial Aid, Scholarships, and the various colleges to review availability of funding and determine calculated allocations of use. Success will be determined by ensuring that available scholarship dollars are used in conjunction with funds provided by the state to recruit and retain students in a cost effective manner.

Finding. The target was met.

Analysis: In 2017-2018 the target was met. The Office of University Advancement met with offices across campus to determine need and allocated funds accordingly. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to adjust allocations based on need.

Based on these changes, in 2018-2019 the target was met. For the fiscal year ending June 30, 2019, the NSU Foundation provided \$4,878,099 in institutional support including \$2,106,807 for student scholarships, \$931,961 for faculty/staff support, \$1,009,058 for capital improvements, \$127,293 for recruiting/marketing initiatives, \$435,293 for operating expenses and \$267,687 for alumni/community outreach events.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 the Office of University Advancement will continue to communicate regularly with the offices of University Recruiting, Financial Aid, Scholarships, and the various colleges to review availability of funding and determine calculated allocations of use.

Measure 4.2

The NSU Foundation/Office of University Advancement will compile and distribute an annual report to all stakeholders illustrating the impact of disbursements and highlighting donor specific fund performance. The target is to compile and submit the report annually.

Finding. The target was met.

Analysis: In 2017-2018 the target was met. A report detailing endowment activity was sent to donors. Based on the analysis of the 2017-2018 results, changes were made in 2018-2019 to add detail to the report including an impact statement.

Based on these changes, in 2018-2019 the target was met. The impact statement assisted with donor understanding of restricted and unrestricted endowment management.

Action-Decision or Recommendation. Based on the analysis of the results in 2018-2019, in 2019-2020 staff will continue to compile the annual report. It is recommended

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that a list of donors at various levels be published along with the report to encourage participation.

Sources:

Office of University Advancement Meeting Interagency Meeting Minutes
NSUF Annual Report

Comprehensive Summary of Key Evidence of Improvements Based on Analysis of Results.

Placed focus on the number of individual donors and restructured staff responsibilities related to fundraising resulting in increased private support.

Assigned additional prospects to each fundraising manager resulting in increased number of prospects cycled annually.

Placed focus on unrestricted giving during donor visits resulting in increases to the number of donors giving to unrestricted funds.

Increased focus on estate giving benefits and matching fund opportunities resulting in increased variety of giving options realized.

Focused resources on high yield participation events resulting in greater efficiency for increases in participation.

Increased staff responsibilities related to social media resulting in increased participation.

Extended contract for demoNSUnite.net platform and increased staff responsibilities related to volunteer efforts resulting in increased participation.

Increased advocacy efforts by engaging with state level officials and staff in addition to legislators resulting in budget stabilization, funding for capital projects, and policy development.

Increased focus on revenue generating projects resulting in NSU Campus Marketplace completion and private funding of faculty positions.

Plan of Action Moving Forward.

Place focus on major gifts and restructure fundraising responsibilities.

Continue to participate in monthly webinars and attend regional conferences focused on expanded use of the constituent tracking system and prospect identification strategies.

Analyze marketing efforts to increase participation beyond donor visits including targeted mailers, social media promotion, email solicitation, and website development.

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Continue the use of social media platforms with a focus on increasing exposure. Analyze opportunities for paid advertisement or sponsored posts on these platforms to increase engagement.

Establish a special committee of the NSU Alumni Association to assist with membership efforts.

Continue to administer post-event surveys and measure affinity.

Continue advocacy efforts when the legislature is not in session and work closely with legislative and state governing board staff.

Review public private partnerships to ensure long term viability and that new partners be identified. Establish a special committee of the NSU Foundation to explore additional real estate investments and revenue sharing opportunities with private partners.

Continue to communicate regularly with the offices of University Recruiting, Financial Aid, Scholarships, and the various colleges to review availability of funding and determine allocations of use.

Compile annual endowment activity reports and publish giving statistics to encourage participation.

Contract with a marketing consultant to assist with outreach efforts and develop a strategic promotional plan to increase participation across all NSU Alumni Association and NSU Foundation initiatives.