

Assessment Cycle 2019 – 2020

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

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University Advancement are responsible for directing programs and other functions 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 2018-2019 the target was not met. Although an increase of 9.7% was realized, the target was 15%. Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to place focus on major gifts and restructure staff responsibilities related to fundraising.

Due to staff turnover and inability to collect non-contribution event revenue, in 2019-2020 the target was not met. A decrease of 10% was realized, the target was an increase of 15%. Changes implemented to focus on major gifts impacted fundraising as non-revenue contributions increased by 29% despite staff turnover. However, the inability to collect non-contribution event revenue impacted the total amount of private support secured.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 alternative revenue sources will need to be identified if non-contribution event revenue does not increase. Vacant staff positions need to be filled as soon as financially feasible.

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 2018-2019 the target was met. Development officers cycled an average of 149 prospects annually. Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to assign additional prospects to each manager.

Based on these changes, in 2019-2020 the target was met. Development officers cycled an average of 156 prospects annually. The addition of prospects to each manager increased the number of total prospects contacted resulting in a higher conversion rate. The increase was slight however, signaling the capacity of each fundraiser to move prospects through the cycle.

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Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 the NSU Foundation will use a tracking system and further analyze results. It is recommended that development officers continue to participate in monthly webinars and attend regional conferences focused on expanded use of the tracking system and prospect identification strategies. Conversion average targets should be increased 150 to maintain performance standards.

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 not met.

Analysis. In 2018-2019 the target was met. The number of donors giving to the Columns Fund increased from 331 to 416 (28.3%). Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 including an increased focus on unrestricted giving during donor visits.

Due to staff turnover, in 2019-2020 the target was not met. The total number of donors giving to the Columns Fund decreased from 416 to 369 (12%). Increased focus on unrestricted giving during donor visits was effective, however total aggregate donor visits is limited to the number of staff members dedicated to fundraising. Two full time fundraising positions were vacated during the 19-20 fiscal year and remain unfilled.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 marketing efforts need to be analyzed to increase participation beyond donor visits including targeted mailers, social media promotion, email solicitation, and website development. Vacant positions need to be filled as soon as financially feasible.

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.

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Analysis. In 2018-2019 the target was met. Over \$500,000 in estate gifts and matching funds were realized during the 18-19 cycle. Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 including an increased focus on estate giving and matching funds.

Based on these changes, in 2019-2020 the target was met. 2 new estate gifts were established and over \$640,000.00 in indirect contributions was realized. The Board of Regents cleared a backlog consisting of 13 First Generation Endowed Scholarship requests and submitted \$520,000.00 in matching funds to be combined with \$780,000 in existing funds creating a \$1.3 M endowment increase. 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.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 the NSU Foundation will continue to highlight a variety of giving vehicles through existing media including the website and Alumni Columns Magazine. The University of Louisiana System is offering a limited opportunity for each institution to receive \$80,000 in matching funds. The NSU Foundation will work with the board of directors to identify prospects with the capacity to provide \$120,000 in support to secure the funds prior to the December 31, 2020 deadline.

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 met.

Analysis. In 2018-2019 the target was not met. 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. The position was filled and changes were made to establish a renewal process and appeal to new members. The active membership baseline was established at 627.

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Based on these changes, in 2019-2020 the target was met. As of June 30, 2020 there are 692 active members, an increase of 10% from the baseline. The target was met despite difficult peak renewal periods during March and April of 2020.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 the Associate Director of Alumni Affairs will work closely with the Associate Director of Marketing for University Advancement to review membership benefits, make adjustments, and prepare for the 2021 campaign.

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 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. 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. The position was filled and event planning ensued.

Due to COVID-19 and related event cancellations, in 2019-2020 the target was not met.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 events will be reschedule pending COVID-19 restrictions. Additional avenues for participation will be identified.

Measure 2.3

The NSU Alumni Association will increase awareness of fundraising and outreach 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 met.

Analysis: 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 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. The position was filled, and the Assistant Director of Marketing for University Advancement

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was assigned duties to assist with social media growth.

Based on these changes, in 2019-2020 the target was met. Social media exposure increased from 8,173 to 8,995 (10%). Staff members dedicated to growth effectively increased exposure.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 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.

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 2018-2019 the target was met. Participation increased from 1,436 to 1,602 (11.6%). Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to extend the contractual agreement for demoNSUnite.net and increase staff responsibilities related to volunteer efforts.

Based on these changes, in 2019-2020 the target was met. Participation increased from 1,602 to 1,854 (16%). Increased staff responsibilities related to engagement enhanced volunteer efforts. User testimonials were effective in increasing participation.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 the NSU Alumni Association staff will continue, through the use of social media and online communications, to promote the demoNSUnite.net platform. It is recommended that testimonials of successful users continue to be highlighted in marketing materials to demonstrate the ability of the platform to aid in providing employment opportunities for graduates.

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.

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Analysis: In 2018-2019 the target was met. The NSU Student Alumni Association increase membership from 40 to 54 (35%). Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to focus on increasing membership by 20% annually.

Based on these changes, in 2019-2020 the target was met. Membership increased from 54 to 65 and a part time staff member is working with the organization to drive membership.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 efforts need to be further expanded to promote growth. Part time staff will work directly with a special committee of the NSU Alumni Association board of directors 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 2018-2019 the target was met. Survey results revealed over 90% positive feedback exceeding the 80% target. Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to better accommodate participants through online engagement tools including event capability and expanded payment methods.

Based on these changes, in 2019-2020 the target was met. Survey results continue to reveal positive feedback (92%). Positive results are attributed to a myriad of factors 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 2019-2020, in 2020-2021 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

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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 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 textbook affordability, dual enrollment, work-based learning, campus safety, and financial aid. Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to increase efforts further by engaging with state level officials and staff in addition to regularly communicating with legislators.

Based on these changes, in 2019-2020 the target was met. Funding for the Kyser Hall Replacement project increased from \$22.7M to \$37.4M. Previous P2 allocations were moved to P1 and were increased by \$1.6M totaling \$2.225M available for planning and construction in 2020-2021. The project has been placed on the selection board agenda for the July 15 meeting. Funding for demolition projects is being held in escrow and demolition have been scheduled in accordance with the completion of the LSMA dormitory.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 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

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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 2018-2019 the target was met. Public private partnerships increased to 58. These partnerships range from funding of faculty/staff positions to articulation and transfer agreements. The NSU Campus Marketplace was placed into operation in 2018 as a real estate investment and unrestricted revenue stream. Based on the analysis of the 2018-2019 results, changes were made in 2019-2020 to increase focus on revenue generating projects.

Based on these changes, in 2019-2020 the target was met. Public private partnership have increased from 58 to 129. Substantial growth is attributed to the addition of articulation agreements with current partners and new institutions.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 it is recommended that all existing public-private partnerships continue to be reviewed to ensure long term viability and 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
ticksheet.ulsystem.edu
demonsunite.net

SO 4

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

Measure 4.1

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.

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Finding. The target was met.

Analysis: In 2018-2019 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 2018-2019 results, changes were made in 2019-2020 to adjust allocations based on need.

Based on these changes, in 2019-2020 the target was met. For the fiscal year ending June 30, 2020, the NSU Foundation provided \$4,797,118 in institutional support including \$2,695,577 for student scholarships, \$1,060,217 for faculty/staff support, \$160,165 for capital improvements, \$82,119 for recruiting/marketing initiatives, \$693,836 for operating expenses and \$105,204 for alumni/community outreach events.

Action-Decision or Recommendation. Based on the analysis of the results in 2019-2020, in 2020-2021 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 2018-2019 the target was met. A report detailing endowment activity was sent to donors. Based on the analysis of the 2018-2019 results, changes were made in 2019-20 to add detail to the report including an impact statement.

Based on these changes, in 2019-2020 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 2019-2020, in 2020-2021 staff will continue to compile the annual report. It is recommended 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

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

Placed focus on major gifts and restructured staff responsibilities related to fundraising resulting in increased non-revenue contributions.

Increased Alumni Association membership through restructured staff responsibilities and primary focus on renewals.

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

Increased endowment growth through realization of matching gifts and securing permanently restricted contributions.

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

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

Promoted 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 acquisition of contiguous real estate and private funding of staff positions.

Plan of Action Moving Forward.

Develop solicitation and participation techniques beyond traditional in person donor visits. Develop avenues to replace event revenue.

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

Provide additional resources for marketing efforts to increase social media promotion, email solicitation, and website development.

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.

Dedicate part time staff member to work with special committee of the NSU Alumni Association to assist with membership efforts.

Continue to administer post-event surveys and measure affinity.

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

Continue exploring public private partnership opportunities to ensure long term viability and that new partners be identified.

Continue work of NSU Foundation ad hoc committee 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.

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