Meeting of the Committee on Institutional Advancement

Thursday, December 9, 2010
1:00 p.m.
Danna Student Center
Claiborne Room
AGENDA

• Welcoming Remarks ⇒ Derby Gisclair

• Approval of Minutes ⇒ Derby Gisclair

• Approval of endowed professorship ⇒ IA Committee
APPROVAL OF THE “RENNAN BU AND MONICA LeDEE ENDOWED PROFESSORSHIP IN CHEMISTRY”

- Donors
  - 1994 Chemistry alumni
  - Residents of Honduras; currently live in Lafayette, LA

- Resolution to establish endowed fund – pledge of $60K has been fulfilled

- Request approval by Committee to submit to full Board for approval

- Upon approval by Board, professorship will be submitted to Board of Regents
AGENDA - CONTINUED

• Advancement Report  ⇒ Bill Bishop
  – Implementation of Loyola 2012
  – Improve Return on Investment
  – Prepare for the Leadership Phase of a Comprehensive Campaign
  – Prepare for LOYNO Centennial Celebrations
  – Other
IMPLEMENTATION OF LOYOLA 2012
“Enhance Loyola’s National Reputation”

• Peer review ratings—update on 2010-2011 activities

• Alumni participation
  – Annual giving
  – Alumni Survey
IMPLEMENTATION OF LOYOLA 2012
“Enhance Loyola’s National Reputation”

US News Direct Marketing Rankers Campaign

DECEMBER
Monthly Top Stories Recap Email (Emailed 12/7/10)
• Service Learning/ FYE mailer (Mailed 12/6/10)
• PR Newswire- Service Learning Press release
• Christmas Email Blast- (In progress)

JANUARY
• Jan. 7 - Chronicle of Higher Ed + online banner ads
• Monthly Top Stories Recap Email (1st Week)
• Provost Report Mailing – (In progress)
ALUMNI SURVEY OVERVIEW

ABOUT THE 2010 STUDY

– The Alumni Attitude Study©: a national, multi-university annual research study

– June 2010 - 8,500+ LOYNO alumni randomly surveyed by e-mail

– The survey project resulted in a response rate of 12.55% (1,072 completed surveys)
What We Found Out

Loyola alumni appear pleased with their experience of the university... Overall current opinion of Loyola is reported to be either “good” or “excellent” by 96% of respondents.

Loyola alumni appear pleased with alumni communications... Overall, our alumni magazines, website, and e-newsletters received high performance marks, especially from alumni who graduated prior to 2000.

Loyola alumni indicate their overall alumni experience has room to improve... 60% say their experience as an alumnus/a is “good” or “excellent.”

Three largest barriers to participation in alumni activities: Time constraints, Geographic distance, Family/job commitments
What We Found Out

Alumni Loyalty Has Shifted

• In 2005, alumni were more closely tied to colleges, programs, and organizations as students.

• In 2010, loyalty shifted. Both old and young alumni are more closely tied to university as a whole.

Older alumni tend to become less loyal to a faculty member and/or student organization as they age.

The web site remains one of the most favorable methods of communication with young alumni.
What We Found Out

OBSERVATIONS: GIVING

2010-
• 52% of surveyed alumni intend to invest financially in the university and plan to continue or increase their financial contributions (58% average for all institutions in the study).

• 37% of the group who identified themselves as “non-contributors” [48% of total] still promote the university regularly or all the time.

2005 (Pre Katrina)
• 70% of total alumni making financial donations
  (In 2000, only 53% of respondents indicated making a donation.)

Reasons for not supporting Loyola:
1. Financial constraints – 75%
2. Tuition was enough – 26%
3. Don’t feel a connection – 20%
4. Overall dissatisfaction with Loyola – 11%
ALUMNI SURVEY – A FEW INTERESTING NOTES

• National reputation/academic excellence is very important to younger alumni.
• Want to know the equity of their degree is improving / will improve
• Want career services support, networking opportunities, contacts with alumni in all cities; connect new alumni with old alumni.
• Listings of alumni in key cities
• International alumni chapter?
• Focus on scholarship support for legacy students
• Combine reunion years; be sure well attended
• Miss KW’s timely e-communications
• How can I get involved or be a resource?
• Are there Distance Learning courses for alumni?
ALUMNI SURVEY – GOING FORWARD

• Published survey results and thanked participants in Fall 2010
  LUNO Magazine (We heard you.)

• Created an IA Task Force for determination, execution and monitoring of alumni activities as related to survey

• Posted summary of survey results on Alumni Website

• Strive to better connect and be relevant to alumni through ongoing programming and networking events.

• Continue to enhance the perception of “diploma equity.”

• Moving in the direction of improving online communication with alumni.

• Alumni magazines to include young alumni success stories
IMPROVE RETURN ON INVESTMENT (ROI)

• A look at the numbers

• Doing Things Right - Efficiency
  – CASE Voluntary Support for Higher Education Survey – FY 2010
  – Goals and Metrics for 2010-2011

• Doing the Right Things - Effectiveness
  – Comparison institutions
## A REVIEW OF THE NUMBERS

**Loyola University**  
**FYTD 2011 Gifts & Pledges**  
**to November 30**

<table>
<thead>
<tr>
<th>Campaign Description</th>
<th>Cash/Stock</th>
<th>Gifts in Kind</th>
<th>Gift Annuities</th>
<th>Pledge Balances</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior Fiscal Year Restricted Giving</td>
<td>$79,914.81</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$79,914.81</td>
</tr>
<tr>
<td>Prior Fiscal Year Unrestricted Giving</td>
<td>$10,306.86</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$50.00</td>
<td>$10,356.86</td>
</tr>
<tr>
<td>Annual Fund Restricted 2011</td>
<td>$568,383.30</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$84,748.19</td>
<td>$653,131.49</td>
</tr>
<tr>
<td>Annual Fund Unrestricted 2011</td>
<td>$107,419.82</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$41,904.36</td>
<td>$149,324.18</td>
</tr>
<tr>
<td>Outright Gifts for Capital Purposes*</td>
<td>$919,842.97</td>
<td>$44,062.82</td>
<td>$125,633.60</td>
<td>$7,502,089.78</td>
<td>$8,591,629.17</td>
</tr>
</tbody>
</table>

**Grand Totals:** $1,685,867.76 | $44,062.82 | $125,633.60 | $7,628,792.33 | $9,484,356.51

4,391 Gift(s) listed  
2,612 Donor(s) listed

*Property, buildings, equipment and endowment*
# A REVIEW OF THE NUMBERS

**LOYOLA UNIVERSITY NEW ORLEANS**  
**GIFT INCOME COMPARISON, FISCAL YEARS 2009-2011**

<table>
<thead>
<tr>
<th></th>
<th>8/1 to 11/30 FY 2009</th>
<th>8/1 to 11/30 FY 2010</th>
<th>8/1 to 11/30 FY 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CAPITAL GIFTS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restricted Endowment</td>
<td>608,765</td>
<td>134,493</td>
<td>143,798</td>
</tr>
<tr>
<td>Plant Improvements</td>
<td>50,000</td>
<td>100,000</td>
<td>760,000</td>
</tr>
<tr>
<td>Non-Endowed Programs &amp; Grants</td>
<td>105,000</td>
<td>37,283</td>
<td>16,045</td>
</tr>
<tr>
<td>Gifts in Kind</td>
<td>34,750</td>
<td>553,780</td>
<td>44,062</td>
</tr>
<tr>
<td>Annuities</td>
<td>11,745</td>
<td>0</td>
<td>61,267</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$810,260</td>
<td>$825,556</td>
<td>$1,025,172</td>
</tr>
<tr>
<td><strong>ANNUAL GIFTS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restricted</td>
<td>689,668</td>
<td>623,298</td>
<td>648,298</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>191,902</td>
<td>236,529</td>
<td>117,727</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$881,570</td>
<td>$859,827</td>
<td>$766,025</td>
</tr>
<tr>
<td><strong>TOTAL PRIVATE GIFTS</strong></td>
<td>$1,691,830</td>
<td>$1,685,383</td>
<td>$1,791,197</td>
</tr>
</tbody>
</table>
## A REVIEW OF THE NUMBERS

**LOYOLA UNIVERSITY NEW ORLEANS**  
**Gifts by Constituency 2010 - 2011**  
**August 1, 2010 - November 30, 2010**

<table>
<thead>
<tr>
<th></th>
<th>FY 2010</th>
<th>FY 2011</th>
<th>FY 2010 FYTD</th>
<th>FY 2011 FYTD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>November</td>
<td>November</td>
<td>FYTD</td>
<td>FYTD</td>
</tr>
<tr>
<td>Alumni</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>150,195</td>
<td>51,251</td>
<td>288,769</td>
<td>172,434</td>
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<tr>
<td>Capital</td>
<td>14,603</td>
<td>3,258</td>
<td>159,503</td>
<td>236,768</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>164,798</strong></td>
<td><strong>54,509</strong></td>
<td><strong>448,272</strong></td>
<td><strong>409,202</strong></td>
</tr>
<tr>
<td>Individuals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>36,983</td>
<td>80,280</td>
<td>223,502</td>
<td>155,440</td>
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<tr>
<td>Capital</td>
<td>18,105</td>
<td>29,155</td>
<td>47,090</td>
<td>639,125</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>55,088</strong></td>
<td><strong>109,435</strong></td>
<td><strong>270,592</strong></td>
<td><strong>794,565</strong></td>
</tr>
<tr>
<td>Corporations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>50,950</td>
<td>11,420</td>
<td>56,137</td>
<td>51,549</td>
</tr>
<tr>
<td>Capital</td>
<td>5,375</td>
<td>100</td>
<td>23,850</td>
<td>12,200</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>56,325</strong></td>
<td><strong>11,520</strong></td>
<td><strong>79,987</strong></td>
<td><strong>63,749</strong></td>
</tr>
<tr>
<td>Foundations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>3,500</td>
<td>55,729</td>
<td>236,556</td>
<td>263,967</td>
</tr>
<tr>
<td>Capital</td>
<td>37,283</td>
<td>25,000</td>
<td>41,333</td>
<td>287,500</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>40,783</strong></td>
<td><strong>80,729</strong></td>
<td><strong>277,889</strong></td>
<td><strong>292,717</strong></td>
</tr>
<tr>
<td>Organizations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>13,462</td>
<td>8,415</td>
<td>54,863</td>
<td>122,635</td>
</tr>
<tr>
<td>Capital</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>13,462</strong></td>
<td><strong>8,415</strong></td>
<td><strong>54,863</strong></td>
<td><strong>125,635</strong></td>
</tr>
<tr>
<td>Subtotals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>255,090</td>
<td>207,095</td>
<td>859,827</td>
<td>766,025</td>
</tr>
<tr>
<td>Capital</td>
<td>75,366</td>
<td>57,513</td>
<td>271,776</td>
<td>919,843</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>330,456</strong></td>
<td><strong>264,608</strong></td>
<td><strong>1,131,603</strong></td>
<td><strong>1,685,868</strong></td>
</tr>
<tr>
<td>Gifts in Kind</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2,887</td>
<td>5,300</td>
<td>553,780</td>
<td>44,062</td>
</tr>
<tr>
<td>Gift Annuities</td>
<td>0</td>
<td>61,267</td>
<td>0</td>
<td>61,267</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>$333,343</strong></td>
<td><strong>$331,175</strong></td>
<td><strong>$1,685,383</strong></td>
<td><strong>$1,791,197</strong></td>
</tr>
</tbody>
</table>
## A REVIEW OF THE NUMBERS

**LOYOLA UNIVERSITY NEW ORLEANS**

**GIFT INCOME COMPARISON BY COLLEGE**

<table>
<thead>
<tr>
<th></th>
<th>10 Fiscal Year to Date Gifts Received to November 30, 2009</th>
<th>11 Fiscal Year to Date Gifts Received to November 30, 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Humanities &amp; Natural Science</strong></td>
<td>$43,201 Total Annual Gifts $38,693 Total Capital Gifts $81,894 Total Received Humanities &amp; Natural Science</td>
<td>$27,701 Total Annual Gifts $18,473 Total Capital Gifts $46,174 Total Received Humanities &amp; Natural Science</td>
</tr>
<tr>
<td><strong>College of Business</strong></td>
<td>$165,643 Total Annual Gifts $4,175 Total Capital Gifts $169,818 Total Received College of Business</td>
<td>$74,006 Total Annual Gifts $0 Total Capital Gifts $74,006 Total Received College of Business</td>
</tr>
<tr>
<td><strong>College of Social Sciences</strong></td>
<td>$65,606 Total Annual Gifts $7,463 Total Capital Gifts $73,069 Total Received Social Sciences</td>
<td>$9,622 Total Annual Gifts $3,319 Total Capital Gifts $12,941 Total Received Social Sciences</td>
</tr>
<tr>
<td><strong>College of Law</strong></td>
<td>$122,166 Total Annual Gifts $172,164 Total Capital Gifts $294,330 Total Received Law</td>
<td>$293,034 Total Annual Gifts $219,866 Total Capital Gifts $512,900 Total Received Law</td>
</tr>
</tbody>
</table>
### A REVIEW OF THE NUMBERS

**LOYOLA UNIVERSITY NEW ORLEANS**  
**GIFT INCOME COMPARISON BY COLLEGE**

#### Fiscal Year to Date Gifts Received to November 30, 2009

<table>
<thead>
<tr>
<th>College of Music &amp; Fine Arts</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received College of Music &amp; Fine Arts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$71,651</td>
<td>$35,949</td>
<td>$107,600</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Library Gift Total</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received Library</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$20,456</td>
<td>$2,028</td>
<td>$22,484</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Athletics Gift Total</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received Athletics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$26,303</td>
<td>$11,315</td>
<td>$37,618</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mission &amp; Ministry Gift Total</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received Mission &amp; Ministry</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$5,980</td>
<td>$0</td>
<td>$5,980</td>
</tr>
</tbody>
</table>

#### Fiscal Year to Date Gifts Received to November 30, 2010

<table>
<thead>
<tr>
<th>College of Music &amp; Fine Arts</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received College of Music &amp; Fine Arts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$60,625</td>
<td>$80,230</td>
<td>$140,855</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Library Gift Total</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received Library</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$5,269</td>
<td>$3,545</td>
<td>$8,814</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Athletics Gift Total</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received Athletics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$29,972</td>
<td>$650</td>
<td>$30,622</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mission &amp; Ministry Gift Total</th>
<th>Campaign Type</th>
<th>Total Annual Gifts</th>
<th>Total Capital Gifts</th>
<th>Total Received Mission &amp; Ministry</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$17,329</td>
<td>$25,000</td>
<td>$42,329</td>
</tr>
</tbody>
</table>

$521,006 Total Annual Dollars  
$271,787 Total Capital Dollars*  

* Property, buildings, equipment and endowment
## A REVIEW OF THE NUMBERS

### LOYOLA UNIVERSITY NEW ORLEANS

Donor Count by Constituency 2010-2011

<table>
<thead>
<tr>
<th>Constituency</th>
<th>FY 2010 # Solicitable</th>
<th>FY 2010 # Donors</th>
<th>FY 2011 # Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alumni Total</strong></td>
<td>40,257</td>
<td>1,097</td>
<td>1,393</td>
</tr>
<tr>
<td>Human &amp; Natural Science**</td>
<td>7,997</td>
<td>274</td>
<td>350</td>
</tr>
<tr>
<td>College of Business**</td>
<td>6,770</td>
<td>190</td>
<td>244</td>
</tr>
<tr>
<td>Social Sciences**</td>
<td>12,452</td>
<td>282</td>
<td>373</td>
</tr>
<tr>
<td>College of Law**</td>
<td>8,020</td>
<td>179</td>
<td>192</td>
</tr>
<tr>
<td>Music &amp; Fine Arts**</td>
<td>2,202</td>
<td>59</td>
<td>86</td>
</tr>
<tr>
<td><strong>Individuals Total</strong></td>
<td></td>
<td>737</td>
<td>746</td>
</tr>
<tr>
<td>Parents**</td>
<td>284</td>
<td></td>
<td>131</td>
</tr>
<tr>
<td>Trustees**</td>
<td>2</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td><strong>Corporations</strong></td>
<td>54</td>
<td></td>
<td>69</td>
</tr>
<tr>
<td>Foundations</td>
<td>17</td>
<td></td>
<td>31</td>
</tr>
<tr>
<td>Organizations</td>
<td>20</td>
<td></td>
<td>21</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>1,925</td>
<td></td>
<td>2,260</td>
</tr>
</tbody>
</table>

* As of 8/4/2010

** Parenthetical
A REVIEW OF THE NUMBERS

TOTAL OUTRIGHT* GIFTS FISCAL 08 TO 11

* Includes cash and gifts in kind.

FISCAL YEARS

8/1/2007 TO 11/30/2007: $1,374,565
8/1/2008 TO 11/30/2008: $1,604,800
8/1/2009 TO 11/30/2009: $1,685,383
8/1/2010 TO 11/30/2010: $1,791,197
A REVIEW OF THE NUMBERS

ALUMNI GIFTS FISCAL 08 TO 11

FISCAL YEARS

8/1/2007 TO 11/30/2007
8/1/2008 TO 11/30/2008
8/1/2009 TO 11/30/2009
8/1/2010 TO 11/30/2010

DOLLARS RECEIVED

$100,000
$200,000
$300,000
$400,000
$500,000
$600,000
$700,000
$800,000
$900,000
$1,000,000

$849,981
$748,752
$448,272
$409,202

LOYOLA UNIVERSITY NEW ORLEANS
A REVIEW OF THE NUMBERS

NUMBER OF TOTAL DONORS FISCAL 08 TO 11

<table>
<thead>
<tr>
<th>Fiscal Years</th>
<th>Number of Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/1/2007 TO 11/30/2007</td>
<td>2,243</td>
</tr>
<tr>
<td>8/1/2008 TO 11/30/2008</td>
<td>1,370</td>
</tr>
<tr>
<td>8/1/2009 TO 11/30/2009</td>
<td>1,925</td>
</tr>
<tr>
<td>8/1/2010 TO 11/30/2010</td>
<td>2,260</td>
</tr>
</tbody>
</table>
A REVIEW OF THE NUMBERS

NUMBER OF ALUMNI DONORS FISCAL 08 to 11

8/1/2007 TO 11/30/2007  1,579
8/1/2008 TO 11/30/2008  874
8/1/2009 TO 11/30/2009  1,097
8/1/2010 TO 11/30/2010  1,393
CAE VOLUNTARY SUPPORT FOR HIGHER EDUCATION SURVEY

- What is it?
- Why do it?
- Trend line data
- Benchmarking
- It is voluntary
- “Garbage in = garbage out”
- What does it tell us?
- What it doesn’t tell us.
CAE VOLUNTARY SUPPORT FOR HIGHER EDUCATION SURVEY

Fiscal Year 2009
$6,113,615.64

VSE 2009 Survey
$27.85 Billion

- Alumni
- Corporations
- Individuals
- Foundations
- Other Organizations
- Religious

LOYOLA UNIVERSITY NEW ORLEANS
CAE VOLUNTARY SUPPORT FOR HIGHER EDUCATION SURVEY

2 Year Gift Comparison

2009
$6,113,615.64

2010
$5,121,665.76

- Alumni
- Corporations
- Individuals
- Foundations
- Other Organizations
- Religious

LOYOLA UNIVERSITY NEW ORLEANS
FOCUS ON DEVELOPMENT

• Development distinguished from Annual Giving
• Areas of work: frontline development staff, stewardship, research, grant development, administrative assistants
• Characteristics of current staff
• Changes in process to meet strategic goals
FOCUS ON DEVELOPMENT

Core Goals and Metrics

110 visits
25 proposals
“Visit” and “Proposal” defined
Dollar Goals (measured three ways)
FOCUS ON DEVELOPMENT

Strategy and Tools for Achieving Goals

• Help leadership and faculty articulate vision and funding needs
• Stewardship
• Board of Trustees / Visiting Committees (committed group of volunteers)
• Travel
• Close integration with Annual Giving, Alumni, Marketing & Communications
DOING THINGS RIGHT – EFFICIENCY
Goals and Metrics for 2010-2011
Marketing & Communications - Terry Fisher

- Complete communications and marketing plan for Centennial celebration and comprehensive campaign.
- Increase effectiveness of alumni communications to younger alumni based on 2010 survey results.
- Engage alumni – increase participation by overseeing social media strategy for the university.
- Increase regional and national awareness of Loyola in support of recruiting and degree value.
- Increase local, regional, and national press coverage over 2009-2010.
- Ensure all LOYNO external communications possess a consistent editorial and geographic identity.
- Determine and establish ROI measures for Website, Public Affairs, and Social Media.
- Complete full redevelopment of entire university site by Fall 2011.
DOING THINGS RIGHT – EFFICIENCY
Goals and Metrics for 2010-2011
Advancement Records - Martha Bodker

• Facilitate increased communication with constituencies
  – Valid phone numbers on 90% of active alumni records
  – E-mail addresses on a minimum of 50% of our records by July 31, 2011.

• Prepare for upcoming campaign
  – Ensure and create, if necessary, a full system of campaign management and gift officer performance reports.
  – Review current University gift acceptance and endowment policies, make recommendations for revisions, obtain approval from University, and have recommendations prepared for BOT approval by no later than May 2011.
  – Ensure gift counting policies and procedures reflect current reporting guidelines as established by CASE.
DOING THINGS RIGHT – EFFICIENCY
Goals and Metrics for 2010-2011
Annual Giving - Marcel McGee

• In coordination with development office, raise $760,000 in unrestricted contributions from all constituencies.

• Increase overall total annual giving donors from 5,419 to 5,800 (7%).

• Increasing alumni donors from 3,365 to 3,800 (13%).

• Increase alumni participation from 10% to 11% (as measured by alumni participation in annual giving).

• Develop and distribute updated annual giving marketing materials ensuring that Jesuit ideals and a consistent message and theme are reflected.
DOING THINGS RIGHT – EFFICIENCY
Goals and Metrics for 2010-2011
Alumni Relations - Monique Gardner

• As per Loyola 2012 work with Office of Annual Giving to increase number of alumni donors.
• As per Loyola 2012 work with Mission and Ministry to bring additional Ignatian Spirituality programming to our alumni.
• In preparation of the Centennial celebration activities, establish and empower an Enrichment Committee to plan the First Annual Alumni College for the summer of 2012.
• Increase event effectiveness.
• Continue to build online community, increasing membership by 50% -- from 1337 to 2005.
• Respond appropriately to results of alumni survey.
DOING THE RIGHT THINGS – EFFECTIVENESS
Comparison Institutions

- Villanova University
- Xavier University - Ohio
- Santa Clara University
- Trinity University - Texas
- Rollins College - Florida
- University of Richmond
DOING THE RIGHT THINGS – EFFECTIVENESS
Comparison Institutions

• Why compare?
• Benchmarking
• Best practices
• Goal – not to copy
PARAMETERS FOR COMPARISON

Specific information is provided to you in your folder
PREPARE FOR LEADERSHIP PHASE OF COMPREHENSIVE CAMPAIGN

• Advancement consultant

• Prospectus

• Readiness
CENTENNIAL UPDATE

• Activities commence Spring 2012 and end with public launch of campaign in Spring 2013.

• Anchor events under determination

• “Notional” budget under review
OTHER

• Fund raising climate 2007-2009

• Culture of Philanthropy
FUND RAISING CLIMATE 2007-2009

• Analysis of 2009 VSE Survey

• Results of recent Bank of America Merrill Lynch/Center of Philanthropy 2010 Study of High New Worth Philanthropy
  – Reasons why wealthy individuals give
  – Reasons why they don’t
  – Impact of tax uncertainty

• A finding from VSE study: philanthropic support will never grow sufficiently to become the primary solution to institutional budgeting challenges.
CULTURE OF PHILANTHROPY

• What is it?

• Does it matter?
  
  • Does a “culture of philanthropy exist” at LOYNO?
    – Some considerations

• What needs to be done?
AGENDA - CONTINUED

• New Business – Campaign Organizing Group
• Old Business
• Executive Session
• Adjournment
NEW BUSINESS – CAMPAIGN ORGANIZING GROUP

- Establishment approved at last IA Committee meeting
- Agendas for 3 meetings prepared
- Volunteer confidentiality statement approved
- Next steps?
WRAP UP

- Old Business ⇒ Derby Gisclair
- Executive Session ⇒ Derby Gisclair
- Adjournment ⇒ Derby Gisclair