LOYOLA UNIVERSITY NEW ORLEANS
COMMITTEE ON INSTITUTIONAL ADVANCEMENT
FOR THE BOARD OF TRUSTEES

Thursday, May 19, 2011
1:00 p.m.
Danna Center, 1st Floor – Claiborne Room

AGENDA

1. Welcoming Remarks
   Derby Gisclair

2. Approval of Minutes
   Derby Gisclair

3. Advancement Report
   Bill Bishop
   a. Implementation of Loyola 2012
   b. Return on Investment
      • A look at the numbers – FY 2011
      • Comparison institutions – efficiency versus effectiveness
      • Goals and Metrics for 2010-2011
   c. Preparation for Centennial celebrations
   d. Looking ahead to AY 11-12

4. Faith in the Future: The Campaign for Loyola University New Orleans
   Derby Gisclair, Members of the Campaign Organizing Group, Bill Bishop

5. Staff Reports – Spotlight on “Marketing and Communications”
   Terry Fisher

6. Old Business
   a. Update on BOR “Match” for the Fr. Stephen Duffy Chair in Catholic Studies
      Bill Bishop

7. Executive Session
   Derby Gisclair

8. Adjournment
   Derby Gisclair
LOYOLA UNIVERSITY NEW ORLEANS
COMMITTEE ON INSTITUTIONAL ADVANCEMENT
FOR THE BOARD OF TRUSTEES
December 9, 2010

MINUTES

Present: S. Derby Gisclair, Chair
James A. “Jim” Caillier, Ed.D.
David M. Ferris – via telephone
John J. Finan, Jr.
Anne Gauthier
Sean O’Keefe
Robert A. “Bobby” Savoie
N. John Simmons, Jr.
Kevin Wm. Wildes, S.J., President (ex officio)
Georgia Gresham, Faculty Senate (ex officio)
Ralph A. Litolff, Jr., Alumni Association (ex officio)

Staff: Bill Bishop, Vice President
Dr. Christopher Wiseman, Associate Vice President for Development
Rhonda E. Brehm, Recording Secretary

Absent: Carolyn Callahan, Vice Chair
Ashley C. Schaffer
Chad Shinn
Suzanne T. Mestayer, Chair (ex officio)

1. Welcome

Derby Gisclair opened the meeting at 1:07 p.m.

2. Approval of Minutes

Mr. Gisclair asked if there were any corrections or revisions to the minutes of the October 7, 2010, meeting. There being none, he asked if there was a motion to approve the minutes. MOTION was made by Bobby Savoie and seconded by Jim Caillier. Motion carried.

3. Approval of endowed professorship

Mr. Gisclair stated that the Renan Bu and Monica LeDee Professorship in Chemistry has been submitted to the Committee for approval. If approved, it will be brought before the entire Board for approval on Friday (December 10).
Prior to approving, Bill Bishop provided background on the professorship. He also stated that a chair (the Fr. Stephen Duffy Chair in Catholic Studies) and two professorships (The Fr. Pillar Endowed Professorship in History and the Edward J. Kvet Professorship in Music and Fine Arts), which had been approved by the Board of Trustees in March 2010 and denied by the Board of Regents, will be resubmitted this spring.

A discussion was held over the cause for last year’s denials – the primary reason being that due to the decline in the economy, there was a lack of funds for matching. Prior to last year, almost all Resolutions were approved. Suggestions were made to:

- Cultivate a champion on the Board of Regents. Mr. Gisclair suggested Charlotte Bollinger.
- Independent schools need to come together to have someone represent them.

Sean O’Keefe questioned the length of the Regent’s process. Mr. Bishop will discuss with Tommy Screen and will follow-up on this question.

Mr. Gisclair asked for a motion to approve the Renan Bu and Monica LeDee Professorship in Chemistry. **MOTION** was made by John Finan and seconded by Mr. O’Keefe. Motion carried.

### 4. Advancement Report

Mr. Bishop proceeded with an update on the Office of Institutional Advancement. (A copy of the presentation is available via a link on the Board of Trustee website under the Institutional Advancement Committee section.) Discussions resulting from the presentation:

**Unrestricted Dollars:**
- Mr. Bishop will provide the Committee with a plan on how IA will achieve this goal at the March 2011 meeting.
- Mr. O’Keefe suggested cultivating smaller donors that can be developed into larger donors. One of the objectives would be to increase the number of donors.

**Matching Gifts – suggestions included:**
- Survey corporations with a higher matching gift ratio and find alumni who work for these companies to solicit (Exxon, Johnson & Johnson).
- Look into engaging people who are not alums but who may want to support the university and adopt it as alums.
- Attract alums into supporting the university from a Catholic, Jesuit perspective. Support your religion. Support your Catholic Faith.

**Grenzebach, Glier, and Associates (GG&A):**

Mr. Bishop stated that GG&A’s contract is up for renewal and asked the committee’s input. Fr. Wildes provided the history on GG&A and Loyola:
- He knew them from Georgetown.
- Prior to Katrina, he brought them in to evaluate the Advancement department.
- He needed someone from the outside.
- GG&A was very helpful with this analysis.
Concerns expressed by the committee regarding GG&A:
- They set the bar low.
- Not innovative or creative.
- If you fail to do as they direct, GG&A is not responsible.

Positive: They are good at fundamentals.

5. **Staff reports – Spotlight on “Development”**

Development Officers and Strategic Plan:
Mr. O’Keefe stated that Development Officers have the ability to help leadership articulate vision – match expectations of university with capacity of donors/alums. They can help academics get vision into something donors can relate to:
- Identify and articulate needs.
- Guide enthusiastic donors and their expectations to something that helps the university (and away from something that the university can’t financially support)

Fr. Wildes added that people have specific interests they want to support. Any money that can be put into endowment of scholarships or professorships frees operating money for other things. In general, we have a good framework of places people can put money into.

Question was asked about the process to determine where gifts go that have no designation. Fr. Wildes responded that he looks at where the university needs to put the money and double checks that it is used appropriately. If the money is designated to a College, the Dean will discuss with the Provost the most effective use.

Mr. Bishop made an important note regarding the current metrics for Development Officer visits. If the lead gifts in the Campaign are not there, his Office may need more front line fundraisers. Mr. Bishop further added that he will be asking the committee to help evaluate prospects giving capability.

Three objectives for Bill Bishop:
1. Complete successfully a comprehensive campaign
2. Improve Advancement program
3. Look at where we are in a Culture of Philanthropy and what steps to improve

6. **New Business**

Campaign Organizing Group (COG):
Mr. Gisclair has spoken with several people asking if they would consider sitting on this committee. COG needs four to five people – currently he has two tentatives. He will be calling the remaining people over the next couple of weeks. If someone wants to volunteer, please call him.

Concerns the COG will address:
- If we don’t have a $20M lead gift, it is crucial we have an in-depth analysis before deciding on whether to proceed with the Campaign.
• If we want people to give their time, talent, and treasure, we’ve got to look at the vision of the university and what we’re doing to try to engage alumni. If we have a Case for Support that doesn’t engage the committee, it won’t engage others.

Fr. Wildes stated that because of the history of owning WWL for so long, it’s been a long time since the university had had a campaign. We need to connect with people to build a culture of philanthropy.

Mr. O’Keefe added: There is a huge value to the University for launching the Campaign now that can’t be quantified. This Campaign is really about Loyola:
  1. Who we are.
  2. What we’ve been through and emerged better than before.
It’s tough to measure – intangible – but two big reasons why to do the Campaign that cannot be quantified.

Questions and Suggestions:

Mr. Simmons asked how to get classmates back involved with the university – what receives the most response. Dr. Wiseman responded:
  • Alumni generated events (high volunteer involvement)
  • Affinity groups (there’s synergy with a few individuals)

Mr. Simmons also suggested as possible events:
  • Faculty on the Road
  • Lunch with a Genius (perhaps locally)
He stated that the more you can do before the Campaign, the better

7. **Old Business**

There were no items for discussion.

8. **Executive Session**

There was no executive session.

9. **Adjournment**

There being no further business, the meeting was adjourned at 2:44 p.m.
VICE PRESIDENT’S OVERVIEW

The missions of the Office of Institutional Advancement are (1) to develop understanding and support among the university’s various constituencies in order to secure the resources required to fulfill Loyola’s educational mission and (2) to provide integrated marketing communications to support the university’s strategic goal of achieving national recognition as one of the leading master-level comprehensive universities in the nation.

My office strives to achieve these goals through a rigorous fund development, stewardship, and alumni and parent relations program as well as the implementation of a university-wide marketing communications program focusing on consistent messages and identity, public affairs, publications, advertising, and web online communication.

At our October 2010 meeting of the Advancement Committee, I stated that the Office would focus this year on (1) improving its return on the investment made in it by the University; (2) ensuring the Office is ready by May 2011 to present to the Board of Trustees its recommendation about initiating the Leadership Phase of a comprehensive fundraising campaign; (3) enhancing the University’s external reputation as measured by USN&WR annual rankings; and (4) planning and coordinating with the Provost’s office, university-wide Centennial celebration activities scheduled to commence with AY 2011-2012. Almost all of the Agenda items to be presented at the May 2011 meeting of the Advancement Committee will contribute to the discussion of these areas of emphasis.

I have also asked Terry Fisher, AVP for Marketing and Communications, to present to the Committee a more in-depth discussion of her team’s activities. Reports from the other leaders of the major offices within the Office of Institutional Advancement highlight some of their teams’ major activities since our last meeting held in December 2010.

I look forward to seeing all of you at the forthcoming meeting of the Advancement Committee. We have a full agenda, and I trust you will find it to be time well-spent, as we work together to advance the mission of Loyola University New Orleans.

MAJOR GIFTS, STEWARDSHIP, GRANTS, AND RESEARCH – Chris Wiseman

Loyola University New Orleans seeks support from alumni, parents, friends, private foundations, corporations, and other organizations to meet the university’s philanthropic priorities.

The Office of Development (major gifts, stewardship, grants, and research) in Loyola’s Office of Institutional Advancement is charged with the task of raising funds for the university from
private sources. Loyola’s fundraising priorities are determined by the president, the Board of Trustees, the provost, and the vice president of Institutional Advancement.

**Implementation of Loyola 2012**

The following are ways in which the activities of the Development group within Institutional Advancement have contributed to the implementation of the university’s strategic plan, *Loyola 2012*.

1. Enhance Jesuit Values

   - We solicited and gained support (via one of largest single gifts in university history) for the new Tom Benson Jesuit Center.
   - Addressing the need for the university to gain broader support for Loyola’s Jesuit programs, we have worked with Alumni Relations to create a new position (hired in February 2011) that will focus in part on marketing and fundraising for Jesuit programs at the university. We believe this will help create broad-based community awareness of and engagement with the mission and ministry efforts of the university.
   - Our prior work with the late Rev. Stephen Duffy, and our later work with Academic Affairs, led to the establishment of the Duffy Chair in Catholic Studies, for which a national search has been initiated.
   - We have solicited and procured financial support for the Loyola Institute for Ministry in a variety of areas, including Spanish-language educational programs and outreach work in Africa.

2. Improve Student Retention

   - In pursuit of the sub-goal of enhancing Wolfpack athletics programs, we have participated in the successful filling of a new position in Alumni Relations that will focus on marketing and fundraising for athletic programs at the university. We believe this will help create broad-based community awareness of and engagement with Wolfpack athletics.
   - We have led a complete analysis and reorganization of our development efforts with parents, resulting in an improved identification process for parents we believe can be leaders in our work to engage parents with the university.

3. Enhance Reputation and Stature

   - We led an effort to create a data-driven prioritized list of alumni chapter cities. This has led to a new way of organizing travel and event scheduling.
   - Working with Annual Giving and Alumni Relations, we devised and have implemented a plan to increase the number of personal solicitations to the Loyola Fund. This should improve both the dollars raised and the number of alumni who give, resulting in a better result for *U.S. News and World Report* ranking purposes.
We have worked closely with Annual Giving staff to reorganize fundraising processes and have increased the number of one-on-one visits with alumni and other friends of the university.

We have worked strategically with the Marketing and Publications staff to send high-quality publications about Loyola to the university’s key benefactors and volunteers across the country.

Contact with Peer / Aspirational Institutions

Working in tandem with colleagues in Institutional Advancement, we have chosen comparable institutions to contact in order to discuss best practices. We have initiated contact with the heads of development at each institution as follows:

1. Pete Owendoff, Xavier University (Cincinnati)
2. Nancy Trish Calderon, Santa Clara University
3. Julie Solomon, University of Richmond
4. Jim Gerhardt, Rollins College
5. William Green, Villanova University

We will compare practices and issues in development in the following areas:

Requirements of frontline development officers:
- # of visits, # of proposals to possible donors, $ goals
- Definitions of “visit,” “possible or likely donor,” and “dollars raised.”
- Structure of prospect management system (staff assignments, meeting structure)
- Budget for travel/entertainment/events
- Size of staff vs. size of alumni/donor base (broken out by type of staff: frontline development officers, stewardship staff, research staff, grant writing staff, administrative support staff)

Assessing and Improving Return on Investment

Working with the vice president for Institutional Advancement, we have developed an initial method for assessing return on investment. In the area of development, we will analyze our performance by using the following variables:

1. Dollars raised, as measured annually by the total dollar value of pledges, as well as by the total dollar value of gifts actually made to Loyola
2. Dollars budgeted and spent in salary and operating budgets in the area of development (including development officer expenses and stewardship expenses)

ANNUAL GIVING – Marcel McGee

The Office of Annual Giving is entrusted with securing and developing resources to assist the university in fulfilling its educational mission. The Annual Giving staff works closely with
alumni, parents, and friends of Loyola to communicate the need for funding beyond tuition, and the extensive benefits of supporting Loyola’s mission and operations through contributing to the Annual Fund.

Loyola’s Annual Giving provides operating resources for all areas of the university. Because tuition pays for only 61 percent of the expense of a Loyola education, contributions from alumni, parents, and friends help make up the difference. This remaining 39 percent gap between tuition and expenses is a critical need area, and an opportunity for alumni, parents, and friends of Loyola to support the efforts of the university.

**Annual Giving Summary through March of the 3rd Quarter FY11**

In support of the Annual Giving Office’s mission of securing and developing resources to assist the university in fulfilling its educational mission, we undertook the following activities for the 2nd and 3rd quarters of FY11.

Annual Giving, with the support of other IA Departments, has a goal to raise $760k in unrestricted support this fiscal year from 5,800 donors (3,800 alumni) -- for a 7% increase in overall donors and 12% in alumni donors compared to last fiscal year as well as to bring alumni participation up to 11%, from 10% last fiscal year.

- Continued the Annual Giving Campaign *Loyola Loyal*
  - Emphasizes our commitment to our Jesuit values, the region, and educating the whole student
  - Asks past donors to stay Loyola Loyal through continuous giving
  - Invites non-donors to make one gift, no matter the size, each year

**Annual Giving Office Fundraising Appeals (direct mail, phonathon, faculty & staff campaign, etc.):**

- Annual Giving appeals combined cash donations from alumni, parents, and friends through March of the 3rd Quarter
  - FY11 $408,447 compared to $307,843 same time last year - up 33%
  - FY11 donors 3,327 compared to 2,775 same time last year - up 20%

- Alumni Only responses to Annual Giving Appeals
  - FY11 $281,670 compared to $195,163 same time last year – up 44%
  - FY11 2,352 donors compared to 1,845 same time last year – up 27%

**Solicitation plan remaining for the 3rd and 4th quarters of FY11:**

- Direct mail in May to undergraduate alumni, and parents
• Law direct mail
• Peer aspirations - currently awaiting responses to questions
• Pledge reminders for outstanding pledges from phonathon program
• Matching gift reminder letter to donors employed by matching gift companies
• Solicit segment of university vendors to support the Loyola Fund

ALUMNI RELATIONS – Monique Gardner

The Office of Alumni Relations is dedicated to supporting Loyola University New Orleans through programs, benefits, services, and communications designed, developed, and implemented to create and enhance lasting and mutually beneficial relationships between the University and members of its Alumni Association.

Guided by the Jesuit principles of being men and women with and for others, the Loyola University New Orleans Alumni Association is organized to
• serve alumni
• promote a spirit of cooperation and fellowship among alumni
• encourage the development of lifelong relationships between alumni and the university
• foster philanthropic loyalty and support for the university

2010-2011 Goals

1. As per the strategic plan, Loyola 2012, we will continue to work with the Office of Annual Giving to increase the number of alumni donors.
2. As per Loyola 2012, we will continue to work with Mission and Ministry to bring additional Ignatian Spirituality programming to our alumni.
3. In preparation of the Centennial Celebration, we will establish and empower an Enrichment Committee to start planning our First Annual Alumni College in the summer of 2012 as part of Loyola Enrichment Series – Growing in Knowledge, Deepening our Faith.
4. In preparation for the Comprehensive Campaign, we will increase event effectiveness.
5. In focusing on the “minus two/ plus three concept” and in response to results from a recent alumni survey, we will create additional networking opportunities for our young alumni and encourage young alumni to be resources to Loyola students.
6. We will continue to build our online community, increasing membership by 50%, from 1337 to 2005.

Quarterly Report

Goal 1: As per Loyola 2012, we will continue to work with Office of Annual Giving to increase the number of alumni donors.

We continue to work with the Office of Annual Giving to increase the number of alumni donors. We hope to once again announce at the Jazz Brunch on May 15 that we have a 100% Alumni Association Board of Directors participation in the Loyola Fund. We are also seeking
participation from the College of Business Alumni Board, the Young Alumni Pack, and the Chapter Presidents.

New Staff Position: The Office of Alumni Relations recently hired Allison Russell Waldron as Assistant Director of Jesuit Programs and Wolfpack Athletics. Waldron will serve as a marketing coordinator to help develop and facilitate Jesuit programs and athletic events. She is working with Development and Annual Giving to raise funds for these programs. She will also post upcoming alumni events on Loyola’s Facebook page and Twitter, in an effort to keep alumni engaged through social media.

Class Giving: Members of the Class of 2011 are encouraged to contribute to the senior class gift. Young Alumni volunteers will staff a table at the Senior Crawfish Boil on Friday, May 13, to welcome the 2011 graduates and stress the importance of staying connected to Loyola through service, events, and giving. Graduating seniors must also take an exit survey, and we were able to add two questions pertaining to the importance of staying connected and giving back. These are steps in conveying the Loyola Loyal message to graduating students.

All alumni have received their invitation to Alumni Weekend 2011, May 13 – 15, 2011. Alumni and friends are invited to participate in the Senior Crawfish Boil, Welcome Receptions, Golden Wolves Commencement and Induction Ceremony, Reunion Dinners, and Alumni Jazz Brunch. Our goal is to continue to build alumni support through engagement during this special weekend. A Reunion Class Gift is encouraged by all. In addition to the milestone class reunions, we are hosting a reunion for graduates of the School of Dentistry, College of Pharmacy, and the Medical Technology program on Friday night. These areas of study are no longer offered at Loyola.

Alumni Recognition: John D’Arcy Becker ’61 has been selected to receive the 2010 Adjutor Hominum Award at the Alumni Jazz Brunch. Additional award recipients will also be honored: Gary Hymel ’54, College of Social Sciences; Jennifer Bordes ’84, College of Business; Sean O’Keefe ’77, College of Humanities and Natural Sciences; Susan Hanemann ’73, College of Music and Fine Arts; and Sharonda Williams, J.D. ’01, Young Alumna Award.

Regional Chapter Engagement: The Alumni Association hosted several spring events to further alumni engagement with the University. We are committed to developing and building a base of alumni donors. A conscious effort is made by chapter presidents, alumni staff, and/or university guests at every event to ask participants to support the Loyola Fund.

Staff Performance:
The Office of Alumni Relations has developed a quantitative matrix which will be used to measure staff performance in increasing alumni involvement. The variables include volunteer hours, event attendance, and alumni giving. The three variables will be used to compile a score which will be compared from year to year. Although we have tracked event attendance over the years, we have not kept records of volunteer hours before this year. For this reason, our baseline numbers will be from Fiscal Year 2011. Not only will this exercise create a measurement of our performance, it is hoped that it will identify potential donors whose names will be passed to the Office of Annual Giving. We will utilize a curve of involvement theory to measure our alumni population at each stage of their involvement. The six stages are Awareness, Engagement,
Interest, Commitment, Ownership, and Personal Responsibility. This process may be tweaked as we receive ideas from our peer/aspirational institutions.

Peer Institution Contact Report
Along with the other offices within Institutional Advancement, Alumni Relations has reached out to our counterparts at the chosen peer/aspirational institutions- Xavier University, Rollins College, Santa Clara University, Villanova University, and University of Richmond. To date, we have received information back from Xavier University. We requested the following information from the five institutions:

- Number of alumni staff
- Division of staff responsibilities
- Budget size and source (university funded or membership dues?)
- How is success measured
- Alumni board organization and governance
- Number/type of events (social, service, faculty-led, spirituality-based)
- Online community
- Number of chapters/level of chapter engagement
- Student and young alumni programs (when does program start)
- Networking/career services
- Do they have an Alumni Center?

**Goal 2: As per Loyola 2012, we will continue to work with Mission and Ministry to bring additional Ignatian Spirituality programming to our alumni.**

The Lenten Series 2011: *Sacred Words, Sacred Music* kicked off the Lenten season with their first Wednesday night event on March 16. The final Lenten lecture, “Blocked, Restricted, Unavailable: Is God on Your Contact List?” was presented by Fr. Mark Mossa, S.J., on Wednesday, April 13. The series was free and open to the public.

The Office of Mission and Ministry and the Alumni Association will be hosting an Ignatian Alumni Retreat on May 20 – 22, 2011. The retreat will be open to all alumni, and it will be held at the Jesuit Spirituality Center in Grand Cocteau, La. The retreat will be led by Fr. Jerry Fagin.

**Goal 3: In preparation of the Centennial Celebration, we will establish and empower an Enrichment Committee to start planning our First Annual Alumni College in summer, 2012.**

The Enrichment Committee has met on a monthly basis since the first of the year to plan a three-day alumni college. “Experience Loyola Again,” is set for June 22 – 24, 2012. Alumni will be invited back to experience their favorite professors. Four tracks have been developed; each track will offer six sessions. A “Save the Date” card will be mailed in July 2011. The ultimate goal of this event is to bring alumni back to school and to experience Loyola again.
Goal 4: In preparation for the Comprehensive Campaign, we will increase event effectiveness.

Priority Cities: The Office of Alumni Relations continues to work with Development and Annual Giving to develop a travel strategy which will drive our fundraising and alumni relations as we enter the leadership phase of a comprehensive campaign. The following events were held this quarter in one of our eight priority cities:

- The New York Chapter hosted a Wine & Cheese Reception following “A Night at the New York Philharmonic” on February 16. Donald Boomgaarden, Ph.D., Dean, College of Music and Fine Arts attended.
- The Washington, D.C., Alumni Chapter hosted their annual Bacchus on the Potomac on February 26. Seven other alumni chapters hosted Mardi Gras events.
- The Chicago Chapter hosted a cocktail reception on March 31 at Smith and Wollensky. Fr. Kevin Wm. Wildes was the special university guest.
- On April 8, the Acadia Chapter hosted a cocktail reception at the home of Charles ’61 and Susan Castille in Lafayette. Fr. James C. Carter was the special university guest.

Support of School of Nursing: The Annual School of Nursing Brunch was celebrated on Sunday, March 27, at Ralph’s on the Park. Dr. Ann Cary, Director of the School of Nursing, provided nursing updates. We have assisted Dr. Cary in the formation of a Loyola Alumni Nursing Chapter.

Support of Wolfpack Athletics: The Athletic Department and the Alumni Association hosted The Coach Louis “Rags” Scheuermann Scholarship Fundraiser on Thursday, April 14, at Harrah’s. Former Loyola athletes and friends joined to benefit the scholarship named in honor of a Loyola legend and a New Orleans icon—Rags Scheuermann. On Friday, April 15, the Alumni Relations staff assisted the Athletics Department at the annual Loyola Golf Tournament at Audubon Golf Club, and on Saturday, April 16, Alumni Association co-hosted Family Day at Turchin Stadium at Tulane University.

Support of the Montage Performing Arts Series: The Alumni Association hosted the fourth Wine & Cheese Reception on Friday, April 8, in Roussel Hall Foyer preceding a Loyola Ballet Performance.

Goal 5: In focusing on the “minus two/plus three concept” and in response to results from a recent alumni survey, we will create additional networking opportunities for our young alumni, strengthen our young alumni programming by continuing to provide board training and encouraging young alumni to be resources to Loyola students.

Young Alumni Engagement: The primary goal of the Young Alumni Pack, the University’s regionally based Young Alumni Board, is to strengthen ties with recent graduates and encourage their continued involvement. The Young Alumni Pack hosted a networking opportunity happy hour at the Bulldog Bar & Grill on Thursday, April 14, and a community service project on May 14 assisting various service projects in the St. Bernard Project. Members from the Young Alumni Pack will welcome graduating seniors at the Senior Crawfish Boil on May 13. Plans are also in the making for a young alumni summer event.
Resources to Students: We continue to strive to be resources to the students. The Scholarship Committee of the Loyola University New Orleans Alumni Association has met to finalize the selection process for deserving students. The committee conducted interviews of over 30 applicants for the Graduation Award and Legacy Scholarship. The recipients were notified on April 11. The Alumni Association Joint Career Networking Committee continues to work closely with the Office of Career Development to create student centric career networking programs and opportunities. Our next DINEwOrleans event is set for April 27.

Career Services: The Office of Alumni Relations has been working with the Career Development Center staff to develop career services for alumni.

Goal 6: We will continue to build our online community, increasing membership by 50%, from 1,337 to 2,005.

New Registered Members: 2,054 – This figure represents the total number of members who have gone through the “First Time Login” and accepted the terms and conditions since the website was launched in October 2009 to the present date, April 11, 2011. Our main purpose is to continue to increase alumni engagement, event participation, and annual giving. Since our last report, we have had approximately 101 new members complete the “First Time Login.” Three hundred and thirty-eight alumni registered for events since our February report. Donation Revenue has increased by $3,651 since our last report.

Stewardship: “Thank You” and “Survey” e-mails continue to be sent out after every event to thank alumni for attending, and to capture their feedback about the related event. One true measure of our quality is found in the success of our alumni events. The Office of Alumni Relations has developed a chapter event questionnaire form for each chapter president to complete following every event. The goal of this questionnaire is to track the number of volunteer hours spent organizing and planning the specific event. This will ultimately help us measure alumni involvement.

ADVANCEMENT RECORDS – Martha Bodker

The department’s mission is to insure the university’s ability to communicate effectively with alumni and other constituents, enabling the university to secure the resources required to fulfill its mission. To that end, following is an update on fiscal year 2011 goals and objectives.

To facilitate increased communication with our constituencies:

- As of March 2011, we have increased our alumni records with e-mail addresses from 49% to almost 54%. Alumni with valid phone numbers have increased from 88% to 93%. Database health is optimal as evidenced by a postal return rate of .02% of 47,000 addresses mailed in our most recent magazine file.
- After receiving approval from University Counsel and Internal Audit, we are moving forward with utilizing Papersave document imaging software to capture and retain all
gift documentation, expediting the gift entry process and reducing departmental paper consumption by 50% or more.

- Work continues on scanning historic donor records with 83% of the top 1,000 campaign prospect files completed

To prepare for the upcoming capital campaign:

- Worked with our AVP for Development, Chris Wiseman, to compile a list of capital gifts and commitments that meet campaign objectives to be counted towards campaign goals.
- Drafted proposed revisions to the current Gift and Pledge Policies and Procedures to accommodate campaign giving.
- Work is progressing on the design of a report model which will provide statistical data on campaign fundraising results.
- Plans have been made with Grenzebach, Glier & Assoc. to perform an assessment of Advancement Records in May to determine campaign readiness and provide recommendations on organization and staffing needs.

MARKETING AND COMMUNICATIONS – Terry Fisher

The Office of Marketing and Communications is responsible for the development and execution of the university’s integrated marketing and communications strategies to support Loyola’s mission and objectives. The Office of Marketing and Communications ensures all Loyola’s external communications possess a consistent editorial and graphic identity that upholds the brand and mission of the university.

Its mission is to provide marketing and public affairs communications that support the university strategic goal of achieving national pre-eminence. It is responsible for enhancing the image of the university to market effectively it to its various constituents and to implement the university-wide marketing communications program.

Overall

Marketing Awards Received

Higher Education Marketing Report Advertising Awards:
- MERIT: *U.S. News* Service Learning Image Ad
- MERIT: L.U.N.O. Faculty/Staff Campaign Mailer
- MERIT: Annual Report - President Report
- SILVER: Total PR Response to the BP/Deepwater Horizon Oil Spill *PA*

Ad Club of New Orleans Awards:
- Jennifer Schlotbom ’00, director of publications and marketing, named the 2010 Marketing Director Ad Person of the Year at the club's 2011 ADDY Awards ceremony.
- SILVER ADDY: Annual Report - President Report
CASE Awards:

- Award of Excellence: Loyola University New Orleans Experts Guide *PA*
- Award of Excellence: Annual Report - President Report
- Award of Excellence: Faculty/Staff Campaign Mailer
- Loyola’s Response to the BP/Deepwater Horizon Oil Spill (Public Affairs Total Programs) *PA*
- Redesign of Loyola’s homepage (Homepage Design and Implementation) *Web*
- Crude Awakening Oil Spill Response Website, (Electronic Newsletters, Blogs and Tabloids) *Web & PA*

Campaign Support

- Financed/spearheaded 2010 Alumni Communications Quantitative Survey
- Worked in partnership with Bishop and Wiseman to create a draft of the comprehensive campaign operating plan for the leadership phase of campaign
- In development of a comprehensive Leadership phase communications and marketing plan to position the campaign within the Loyola’s brand, the Loyola community, and within the region, including: campaign tagline and themes, overall strategy, tactics appropriate to each stage (early-silent, silent, and public stages), and platform differentiation (e.g. printed, web, etc.)
  - Guided by strategic recommendations from GG+A study, kor group’s discovery sessions, and qualitative research and approved budget.
  - Campaign communications strategy and creative consulting led by kor/Libretto.
  - Communications design/execution by Marketing & Communications and kor.

Campaign Communications Basics Completed to date

- Internal Prospectus for Quiet Phase
- Graphic Visual Campaign map
- Theme/Platform - Faith in the Future
- Graphic Identity/Brand for theme
- Stationery designs (Letterhead)

Publications and Creative Services Update

Support of Loyola 2012

Enhancing Loyola’s Reputation and Stature

- *U.S. News & World Report* Peer Rankings Campaign: We continued our Top of Mind Awareness direct marketing campaign with the following projects:
  - Service Learning image ad in the Chronicle of Higher Ed + online banner ads (January)
  - President’s Annual Report Mailing (February)
  - Service Learning image ad in the Chronicle of Higher Ed + online banner ads (March)
  - Provost’s 2009 – 2010 Academic Results Report Mailing (March)
Enhance our Jesuit Values
Along with Jesuit, Catholic imagery, the Office of Publications and Creative Services uses the below key messages in external communications whenever appropriate. These concise phrases reinforce the key messages we send about Loyola, reflecting Loyola’s values.

- Loyola produces citizens of the world.
- Jesuits were brave enough to shape a new city. Our students are bold enough to create a better world.
- The world is our classroom, but New Orleans is our home.
- Thinking Critically, Acting Justly
- Developing men and women for others
- Preparing students to be active participants on a global stage

Office of Publications and Creative Services works closely with Fr. Dziak and his team on producing pieces enhancing our Jesuit values.

Support of Centennial

- **Centennial Logo:** Presentation of logos and promotional theming at Jan. Centennial Committee Mtg, final logo and theme chosen by cabinet.
- Implementation begins 4/2012.
- **Theme:** Celebrating our Past, Embracing the Future
- **Art Committee:** The committee met to discuss Centennial commemoration/environmental sign/art.
- **Centennial Book Project:** 100 Year history writing and production is on schedule for Mar. 2012 delivery; Dr. Bernard Cook, author
- **Keynote Speakers Committee:** Headed by Meredith Hartley, PA Director, solicited and received nominations
- **Finalization and approval of estimated FY budget**
- **Gained approval of Signature Events Calendar dates**
Web Communications Update

- As of April 11, 2011, we have completed 636 web projects, with three months remaining in the fiscal year. During the last fiscal year, we completed 736 web projects, so we are well on track to surpass last year’s benchmark.
- Overall Website traffic: Loyola’s site visitors typically spend around 4 minutes per visit. We participate in a monthly benchmarking study with about 40 other schools of similar size, and their average visitor’s time per session is consistently between 30 seconds and a minute lower than ours every month. We dramatically outperform the other schools on several other metrics, one being total visits per month. During the month of January, for example, Loyola got 535,255 visits to our site. The comparison schools’ average was 171,205 visits.
- Launched the new website for the Office of Career Services in the College of Law (3 mo. project)
- Launched the new 2011 commencement site
- Completion of new university interactive calendaring system which allows users to search easily, segment, and navigate to university events. Visitors are given multiple ways to view the calendar—from a list view to a grid view. (5 mo. project)

Support of Loyola 2012

- Concluded a nine-person (3 alumni, 2 prospective students, 2 current students, 2 faculty/staff) Website Usability study in Mar. 2011, consisting of tasks tailored to test the efficiency and ease of the user experience related to
  - Navigation and design of the Loyola website homepage
  - Loyola interior pages, specifically as they relate to common audience-specific tasks
    - i.e.: applying for a prospective student, giving options for alumni, finding commencement info for a current student, finding advising information for a faculty member, etc.

This was a landmark study; Loyola has never completed a formal, completely objective test of our website. The study has allowed us to make several recommendations for changes to certain areas of our site.

- Social Media: As of April 11, 2011, we have 4,513 “friends” on Facebook, and 1,465 “followers” on Twitter. Our average visitor’s time per session during Feb. was 4.4 minutes. This indicates our social media users are far more engaged and committed when they arrive at our Loyola website.
Public Affairs and External Relations Update

Support of Loyola 2012

Enhancing Loyola’s Reputation and Stature

- National Media Coverage Highlights for Spring 2011
  - Professor Dan D’Amico is a regular commentator on Fox Business News
  - Rob Verchick interviewed by AP on Japan disaster, ran in over 100 papers.
  - Wolfpack name dispute with NC State was covered in 100+ stories nationwide
  - Religious Studies professor Cathy Wessinger interviewed by AP about the End of Days
  - Bob Thomas to be interviewed by Fox News about the 1-year anniversary of oil spill
- Neighbor Relations: Created a neighborhood relations strategy to address upcoming phase of construction
- Publications: Neighborhood Newsletter – Sent March 15 to neighbors within a 1-mile radius of the two campuses. Highlighted construction progress, commencement speakers, service learning efforts, and the upcoming president’s forum.

Execution and Coordination of University Special Events

- Commencement – May 14, Convention Center. Actor Wendell Pierce of “Treme” will address graduates. Mayor Mitch Landrieu is the Law Commencement speaker.
- President’s Forum on the BP oil spill – April 27, Nunemaker Auditorium.
- TEACH Town Hall – On April 8, U.S. Sec. of Education Arne Duncan partnered with Loyola to help recruit the next generation of teachers. Leigh Torrence of the Saints also was in attendance.
- Benefactors Dinner – March 17, Roosevelt Hotel. Frank France was honored with the Integritas Vitae Award, Loyola’s highest honor.
## LOYOLA UNIVERSITY NEW ORLEANS
### GIFT INCOME COMPARISON, FISCAL YEARS 2009-2011

<table>
<thead>
<tr>
<th></th>
<th>8/1 to 3/31 FY 2009</th>
<th>8/1 to 3/31 FY 2010</th>
<th>8/1 to 3/31 FY 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CAPITAL GIFTS</strong></td>
<td></td>
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<tr>
<td>Restricted Endowment</td>
<td>1,578,514</td>
<td>591,539</td>
<td>431,726</td>
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<tr>
<td>Plant Improvements</td>
<td>100,000</td>
<td>314,551</td>
<td>885,360</td>
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<td>Non-Endowed Programs &amp; Grants</td>
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<td>37,336</td>
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<td>Gifts in Kind</td>
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<td>48,340</td>
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<td>Annuities</td>
<td>454,681</td>
<td>35,540</td>
<td>266,630</td>
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<td><strong>Total</strong></td>
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<td><strong>$1,577,539</strong></td>
<td><strong>$1,754,701</strong></td>
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<td><strong>ANNUAL GIFTS</strong></td>
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<tr>
<td>Restricted</td>
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<tr>
<td>Unrestricted</td>
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<td>603,829</td>
<td>573,310</td>
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<td><strong>Total</strong></td>
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<td><strong>$2,082,573</strong></td>
<td><strong>$1,872,178</strong></td>
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<td>FY 2010</td>
<td>FY 2011</td>
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<td>March</td>
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<td>Annual</td>
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<td>1,000</td>
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<td>16,912</td>
<td>5,500</td>
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<td>89,750</td>
<td>302,750</td>
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<td>Total</td>
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<td>Annual</td>
<td>267,216</td>
<td>136,496</td>
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<td>Gifts in Kind</td>
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<td>10 Fiscal Year to Date Gifts Received to March 31, 2010</td>
<td>11 Fiscal Year to Date Gifts Received to March 31, 2011</td>
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<td>----------------------</td>
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<td><strong>Humanities &amp; Natural Science Campaign Type</strong></td>
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<td></td>
<td>$93,664 Total Capital Gifts</td>
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<td>$187,716 Total Received Humanities &amp; Natural Science</td>
<td>$147,735 Total Received Humanities &amp; Natural Science</td>
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<td><strong>College of Business</strong> Campaign Type</td>
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<td>$8,150 Total Capital Gifts</td>
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<td>$337,740 Total Received College of Business</td>
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<td><strong>College of Social Sciences</strong> Campaign Type</td>
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<td>$66,329 Total Annual Gifts</td>
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<td></td>
<td>$7,620 Total Capital Gifts</td>
<td>$2,891 Total Capital Gifts</td>
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<td>$153,618 Total Received Social Sciences</td>
<td>$69,220 Total Received Social Sciences</td>
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<td><strong>College of Law</strong> Campaign Type</td>
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<td>$352,588 Total Capital Gifts</td>
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<td></td>
<td>$594,052 Total Received Law</td>
<td>$801,658 Total Received Law</td>
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<tr>
<td><strong>College of Music &amp; Fine Arts</strong> Campaign Type</td>
<td>$155,770 Total Annual Gifts</td>
<td>$120,614 Total Annual Gifts</td>
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<td></td>
<td>$110,875 Total Capital Gifts</td>
<td>$350,920 Total Capital Gifts</td>
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<td></td>
<td>$266,645 Total Received College of Music &amp; Fine Arts</td>
<td>$471,534 Total Received Music &amp; Fine Arts</td>
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</tbody>
</table>

Chart 1 of 2
<table>
<thead>
<tr>
<th>Library Gift Total</th>
<th>Campaign Type</th>
<th>Library Gift Total</th>
<th>Campaign Type</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td>$41,317</td>
<td>Total Annual Gifts</td>
<td>$15,503</td>
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<td>$54,060</td>
<td>Total Capital Gifts</td>
<td>$44,614</td>
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<td>$95,377</td>
<td>Total Received Library</td>
<td>$60,117</td>
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<table>
<thead>
<tr>
<th>Athletics Gift Total</th>
<th>Campaign Type</th>
<th>Athletics Gift Total</th>
<th>Campaign Type</th>
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<tbody>
<tr>
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<tr>
<td>$66,200</td>
<td>Total Annual Gifts</td>
<td>$99,706</td>
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<td>$33,230</td>
<td>Total Capital Gifts</td>
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<td>Total Capital Gifts</td>
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<tr>
<td>$99,430</td>
<td>Total Received Athletics</td>
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<table>
<thead>
<tr>
<th>Mission &amp; Ministry Gift Total</th>
<th>Campaign Type</th>
<th>Mission &amp; Ministry Gift Total</th>
<th>Campaign Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td>$38,395</td>
<td>Total Annual Gifts</td>
<td>$53,380</td>
<td>Total Annual Gifts</td>
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<td>$0</td>
<td>Total Capital Gifts</td>
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<td>Total Capital Gifts</td>
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<td>$38,395</td>
<td>Total Received Mission &amp; Ministry</td>
<td>$78,920</td>
<td>Total Received Mission &amp; Ministry</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Total Annual Dollars</th>
<th>Total Capital Dollars*</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,088,261</td>
<td>$1,070,162</td>
<td>$827,487</td>
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</tbody>
</table>

* Property, buildings, equipment and endowment
ALUMNI GIFTS FISCAL 08 TO 11

8/1/2007 TO 3/31/2008
$1,500,473*

8/1/2008 TO 3/31/2009
$1,704,268**

8/1/2009 TO 3/31/2010
$916,898

8/1/2010 TO 3/31/2011
$858,227
NUMBER OF TOTAL DONORS FISCAL 08 TO 11

- 8/1/2007 TO 3/31/2008: 4,088
- 8/1/2008 TO 3/31/2009: 3,395
- 8/1/2009 TO 3/31/2010: 3,914
NUMBER OF ALUMNI DONORS FISCAL 08 to 11

- 8/1/2007 TO 3/31/2008: 2,836 donors
- 8/1/2008 TO 3/31/2009: 2,194 donors
- 8/1/2009 TO 3/31/2010: 2,316 donors
- 8/1/2010 TO 3/31/2011: 2,684 donors
RESOLUTION

WHEREAS, the leadership study conducted by Grenzebach Glier and Associates in 2009 produced a clear demonstration of the community’s high regard for the University, and a general encouragement to proceed with an effort as soon as it is prepared to; and

WHEREAS, the Trustees are convinced of the importance of ensuring the continued existence of Loyola University New Orleans as a distinguished center of learning in the Jesuit tradition, and are further convinced that a substantial infusion of funds from private sources will enhance greatly the future of the University as it enters into its second centennial; and

WHEREAS, the Committee on Institutional Advancement of the Board of Trustees has been delegated by this Board the responsibility for the conduct of the campaign; and, therefore, be it

RESOLVED that the Trustees affirm their personal and joint commitment to a comprehensive campaign, entitled *Faith in the Future: The Campaign for Loyola University New Orleans*, that would be successfully completed by July 31, 2017, with a tentative goal of $100 million; and be it further

RESOLVED that the Leadership/Quiet/Silent Phase of the campaign will commence no later than August 1, 2011, and that the Board of Trustees, will make its final determination as to date of the initiation of the Public Phase of the campaign, tentatively planned for the spring of 2013, and the formal announced goal of the campaign no later than the December 2012 meeting of the Board.