I take this opportunity to introduce myself and to express how honored I am to serve as Loyola’s Vice President for Institutional Advancement.

The office I am privileged to lead seeks to develop understanding and support among the constituencies of the university – alumni, students, parents, and friends -- in order to secure the resources required to fulfill Loyola’s educational mission and to support the university’s strategic goal of achieving national recognition as one of the leading comprehensive universities in the nation.

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

My objectives for the Office’s activities during my recently completed first year as its vice-president were (1) to improve the Office’s return on investment; (2) to ensure its readiness to initiate the Leadership Phase of a comprehensive fund raising campaign and to present to the Advancement Committee my formal recommendation in this regard no later than the May 2011 meeting of the Board of Trustees; (3) to continue the Office’s work on supporting the overarching strategies of Loyola 2012, especially by enhancing the university’s external reputation by improving Loyola’s ranking in the U.S. News & World Report’s Regional Universities South category; and (4) in coordination with other members of the university team to plan and to coordinate university-wide Centennial celebration activities. I am pleased to report that my team made good progress in each of these areas.

Thanks to the work of the Board of Trustees’ Committee on Institutional Advancement --and especially the Campaign Organizing Group of that Committee -- the Board of Trustees concurred with the resolution to enter into the Leadership Phase of Loyola’s Faith in the Future campaign [a copy of the resolution is included in your orientation book].

Moving forward into AY 2011-2012, the Office of Institutional Advancement will continue to focus its efforts in each of the aforementioned areas. Additionally, we will present to the president on or about August 29, 2011, a comprehensive advancement plan for AY 2011-2012. We will also do our part to ensure a successful five year SACs accreditation review. And, as the university moves forward with the implementation projects of Phase II of the university’s Master Plan, we will engage the university’s community neighbors to ensure that this implementation proceeds as smoothly as possible.
In the pages that follow, the leaders of my team, Chris Wiseman – Associate Vice President (AVP) for Development; Terry Fisher – AVP for Marketing and Communications; Marcel McGee – Director of Annual Giving; Monique Gardner – Director of Alumni Relations; and Martha Bodker – Director of Advancement Records; provide you with general information about their areas of responsibility. I also ask you to familiarize yourself with the university’s official Gift and Pledge Policies and Procedures found in a later section of this report.

The Office of Institutional Advancement also staffs the following Board activities:

1. Committee on Institutional Advancement

2. Visiting Committees

The members of my team and I look forward to working with you throughout the coming year. Thank you for your willingness to invest your time, talent, and, in some cases, your treasure, in supporting Loyola University New Orleans.
Bill Bishop assumed the position of Vice President for Institutional Advancement at Loyola University New Orleans on July 19, 2010. Prior to his appointment, Bill served as the Associate Vice President for Medical Center Advancement at Georgetown University since January 2008. He also served as Vice President for Development at The University of Texas Southwestern Medical Center from 2003 – 2008, and Director of Development and Administration for the National World War II Memorial Project from 1997 – 2003.

Prior to that Bill had a career in the United States Army, where he had tours of duty in Greece, Italy, and the United States. His duty positions included artillery battery and detachment commander; assistant/associate professor of political science at the United States Military Academy; Assistant Army Attaché, US Embassy, Rome, Italy; Instructor, Command and General Staff College, Ft. Leavenworth, KS; U.S. Army’s Training and Doctrine Command’s Liaison Officer to the Italian Army Staff, Rome, Italy; and Director of Administration for International Assignees, Fort Monroe, VA.

Bill has a bachelor of science degree from the United States Military Academy, a laurea in scienze politiche dall’universita’ degli studi di firenze; a master of arts in political science from Tulane University; and a master of arts in management from Webster University. Bill is an Olmsted Scholar.

Bill is married to the former Cynthia Grace Dalton of Shreveport, Louisiana. They have three children – Anthony, Christina, and Michael – and two grandchildren – Lucy and Ben.
OFFICE OF INSTITUTIONAL ADVANCEMENT

VISITING COMMITTEES

Visiting committees are designed to bring external perspectives to the campus, to inform the community of the varied academic activities of the university, and to raise funds for the colleges at Loyola University New Orleans.

Committee members are appointed by the president from among alumni and other friends of the university. At least 20, but no more than 50 members are appointed to rotating three-year terms. Recommendations are made by the deans of the colleges and the vice president for Institutional Advancement.

Periodically, reports from the committees are made to the president. These reports are intended to give an objective view of the program to the president.

Although the visiting committee serves as an important external advocate for the particular college in the community, the visiting committee is not to be considered an internal advocacy group for the college on the campus, nor does it determine academic policies reserved to the trustees. Through its external fundraising and advocacy work, however, the visiting committee should reflect the abilities of the university to respond to the challenges and opportunities presented in educating young men and women in the Jesuit tradition to serve society and their communities.

The following visiting committees currently are in service to Loyola:

<table>
<thead>
<tr>
<th>Business</th>
<th>Dennis Lauscha, Chair</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humanities and Natural Sciences</td>
<td>Bill Pope, Chair</td>
</tr>
<tr>
<td>Law</td>
<td>Judge Mary Becnel, Chair</td>
</tr>
<tr>
<td>Library</td>
<td>Christina South, Chair</td>
</tr>
<tr>
<td>Music and Fine Arts</td>
<td>Emel Mize, Chair</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>John Deveny, Chair</td>
</tr>
</tbody>
</table>
## Alumni Counts

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Alumni Records</td>
<td>56,227</td>
</tr>
<tr>
<td>Total Marked Deceased</td>
<td>9,097</td>
</tr>
<tr>
<td>Total Active Records</td>
<td>42,146</td>
</tr>
<tr>
<td>Total Inactive Records</td>
<td>4,984</td>
</tr>
</tbody>
</table>

## Percentages

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living with valid addresses</td>
<td>75%</td>
</tr>
<tr>
<td>Inactive or bad addresses</td>
<td>8.8%</td>
</tr>
<tr>
<td>Deceased</td>
<td>16.2%</td>
</tr>
</tbody>
</table>

## Details

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td># Alumni of Record</td>
<td>45,164</td>
</tr>
<tr>
<td># Undergraduate Alumni of Record</td>
<td>29,550</td>
</tr>
<tr>
<td># Solicitable Alumni</td>
<td>44,734</td>
</tr>
<tr>
<td># Solicitable Alumni with valid mailing address</td>
<td>41,196</td>
</tr>
<tr>
<td># Solicitable Alumni ok to call</td>
<td>42,358</td>
</tr>
<tr>
<td># Solicitable with valid phone</td>
<td>40,862 (91.3%)</td>
</tr>
<tr>
<td># Solicitable with email (ok to email)</td>
<td>17,188 (38%)</td>
</tr>
<tr>
<td># Alumni, Parents &amp; Friends with email</td>
<td>20,731</td>
</tr>
<tr>
<td># Total individuals with email (including those with bad addresses)</td>
<td>21,781</td>
</tr>
</tbody>
</table>

* Solicitable alumni must have some means of contact to be included; a good address, phone number or email are considered valid forms of contact.
Office of Institutional Advancement

Development represents the private philanthropic operations of the university. All private solicitations of funds are coordinated through the various offices listed below. The activities are divided between two managers and the vice president.

Vice President:

Capital Campaigns

Annual Giving:

Annual Giving (the Loyola Fund)

Faculty/Staff Fundraising

Graduating Student Fundraising

Parents Fundraising

Development:

Advancement Research

Grant Development

Development Officers:

College of Business
College of Humanities and Natural Sciences
College of Law
College of Music and Fine Arts
College of Social Sciences
Corporations and Foundations

Planned Giving

Stewardship and Donor Relations
Office of Alumni Relations Mission –

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.

Loyola University New Orleans Alumni Association Mission –

Guided by the Jesuit principles of 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, and foster philanthropic loyalty and support for the University.

Office of Alumni Relations An Overview-

Recognizing that our greatest assets are the members of the Alumni Association, the Office of Alumni Relations is developing a membership of committed, trained volunteers who enjoy their post-graduate experience, are proud to be Alumni Association members, and feel that their volunteer time is used efficiently and effectively. The staff oversees and manages three alumni boards- Alumni Association Board of Directors, College of Business Alumni Board, and Young Alumni Pack- and oversees 27 national chapters, each with its own leadership, and more than 10 active volunteer committees.

The Office of Alumni Relations also works in conjunction with the Office of Annual Giving to promote The Loyola Fund. Board members and chapter leaders are strongly encouraged to make leadership gifts to the University and are empowered to act as annual fund ambassadors here and around the country.

Through board service, committee work, and chapter development, the alumni staff encourages volunteers to plan and execute activities, which will establish the connection between their peers and Loyola. Through our chapters, we are building a Loyola presence in various cities while providing a forum for educational and social activities, a contact for career and other services for alumni and students, a recruiting center for admissions, and conduit for communications between alumni and Loyola.

Through print and online publications, which include editorial support for the university magazine, preparing the alumni monthly e-mail newsletter and the weekly calendar of events,
and through social media, we keep our members informed of activities and news from campus. The alumni website and online community enhance communication among members and provides an effective forum for member input, ideas, and feedback.

Alumni events also serve as vehicles for communication. We bring university updates and provide opportunities for members to sample the recent research and top-notch teaching emerging from the University. We utilize trained volunteers to deliver the fundraising message at each event.

We also deliver stewardship which includes sending letters of congratulations and notes of appreciation. We recognize and honor life’s milestones and send prayer cards and honor alumni successes on the website and through our awards program. We offer a travel program for the entire Loyola community, reinforcing the Loyola's traditions and values. Our affinity partners offer useful benefits to the Loyola family while providing generous support for alumni programs.
Loyola University New Orleans Alumni Association has 27 chapters in Louisiana and throughout the United States. Alumni, parents and friends of the university are encouraged to attend local functions and build strong networks, which will help the efforts of Institutional Advancement.

Chapters and clubs located in the state of Louisiana include:

Acadiana
Baton Rouge
Northshore (Mandeville, Covington, Slidell)
Shreveport

Chapters and clubs located in other states include:

Atlanta, GA
Austin, TX
Boston, MA
Central Florida (Orlando)
Chicago, IL
Dallas, TX
Denver, CO
Houston, TX
Las Vegas, NV
Los Angeles & Orange County, CA
Miami, FL
Mississippi Gulf Coast (Biloxi)
Nashville, TN
New York City, NY
Philadelphia, PA
Phoenix, AZ
Puerto Rico
Raleigh, NC
St. Louis, MO
San Diego, CA
Seattle, WA
Tampa, FL
Washington, D.C.
## Office of Institutional Advancement

### Alumni Distribution by State

<table>
<thead>
<tr>
<th>State</th>
<th>Living Alumni</th>
<th>Address</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>40</td>
<td>North Carolina</td>
<td>671</td>
</tr>
<tr>
<td>Alabama</td>
<td>606</td>
<td>North Dakota</td>
<td>1</td>
</tr>
<tr>
<td>Arkansas</td>
<td>213</td>
<td>Nebraska</td>
<td>95</td>
</tr>
<tr>
<td>Arizona</td>
<td>228</td>
<td>Nevada</td>
<td>122</td>
</tr>
<tr>
<td>California</td>
<td>1,455</td>
<td>New Hampshire</td>
<td>40</td>
</tr>
<tr>
<td>Colorado</td>
<td>383</td>
<td>New Jersey</td>
<td>369</td>
</tr>
<tr>
<td>Connecticut</td>
<td>198</td>
<td>New Mexico</td>
<td>119</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>189</td>
<td>New York</td>
<td>909</td>
</tr>
<tr>
<td>Delaware</td>
<td>71</td>
<td>Ohio</td>
<td>440</td>
</tr>
<tr>
<td>Florida</td>
<td>2,830</td>
<td>Oklahoma</td>
<td>136</td>
</tr>
<tr>
<td>Georgia</td>
<td>1,237</td>
<td>Oregon</td>
<td>117</td>
</tr>
<tr>
<td>Hawaii</td>
<td>46</td>
<td>Pennsylvania</td>
<td>372</td>
</tr>
<tr>
<td>Iowa</td>
<td>82</td>
<td>Puerto Rico</td>
<td>244</td>
</tr>
<tr>
<td>Idaho</td>
<td>115</td>
<td>Rhode Island</td>
<td>40</td>
</tr>
<tr>
<td>Illinois</td>
<td>700</td>
<td>South Carolina</td>
<td>251</td>
</tr>
<tr>
<td>Indiana</td>
<td>221</td>
<td>South Dakota</td>
<td>15</td>
</tr>
<tr>
<td>Kansas</td>
<td>147</td>
<td>Tennessee</td>
<td>595</td>
</tr>
<tr>
<td>Kentucky</td>
<td>176</td>
<td>Texas</td>
<td>3,443</td>
</tr>
<tr>
<td>Louisiana</td>
<td>19,899</td>
<td>Utah</td>
<td>68</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>312</td>
<td>Virginia</td>
<td>908</td>
</tr>
<tr>
<td>Maryland</td>
<td>522</td>
<td>Virgin Islands</td>
<td>9</td>
</tr>
<tr>
<td>Maine</td>
<td>76</td>
<td>Vermont</td>
<td>19</td>
</tr>
<tr>
<td>Michigan</td>
<td>333</td>
<td>Washington</td>
<td>234</td>
</tr>
<tr>
<td>Minnesota</td>
<td>112</td>
<td>Wisconsin</td>
<td>167</td>
</tr>
<tr>
<td>Missouri</td>
<td>669</td>
<td>West Virginia</td>
<td>35</td>
</tr>
<tr>
<td>Mississippi</td>
<td>873</td>
<td>Wyoming</td>
<td>17</td>
</tr>
<tr>
<td>Montana</td>
<td>27</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Grand Total 41,196
## Alumni Distribution by Foreign Country

### Living Alumni with Valid Addresses

*As of June 14, 2011*

<table>
<thead>
<tr>
<th>Region</th>
<th>Asia</th>
<th>Europe</th>
<th>Caribbean</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>China</strong></td>
<td>2</td>
<td>Belgium 2</td>
<td>Aruba 1</td>
</tr>
<tr>
<td><strong>Hong Kong</strong></td>
<td>1</td>
<td>France 4</td>
<td>Bahamas 3</td>
</tr>
<tr>
<td><strong>India</strong></td>
<td>2</td>
<td>Germany 2</td>
<td>British West Indies 1</td>
</tr>
<tr>
<td><strong>Indonesia</strong></td>
<td>1</td>
<td>Greece 1</td>
<td>Cayman Islands 5</td>
</tr>
<tr>
<td><strong>Japan</strong></td>
<td>17</td>
<td>Ireland 3</td>
<td>Cuba 1</td>
</tr>
<tr>
<td><strong>Rep. of Korea</strong></td>
<td>3</td>
<td>Italy 5</td>
<td>Dominican Republic 1</td>
</tr>
<tr>
<td><strong>Lebanon</strong></td>
<td>1</td>
<td>Lithuania 1</td>
<td>Grenada 1</td>
</tr>
<tr>
<td><strong>Malaysia</strong></td>
<td>4</td>
<td>Malta 2</td>
<td>Haiti 4</td>
</tr>
<tr>
<td><strong>Saudi Arabia</strong></td>
<td>1</td>
<td>Netherlands 2</td>
<td>Jamaica 1</td>
</tr>
<tr>
<td><strong>Singapore</strong></td>
<td>2</td>
<td>Norway 1</td>
<td>N. Antilles 2</td>
</tr>
<tr>
<td><strong>Thailand</strong></td>
<td>5</td>
<td>Portugal 1</td>
<td>Trinidad &amp; Tobago 5</td>
</tr>
<tr>
<td><strong>Turkey</strong></td>
<td>2</td>
<td>Scotland 30</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spain 9</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sweden 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Switzerland 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>U.K. 55</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>41</strong></td>
<td><strong>121</strong></td>
<td><strong>25</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Africa</th>
<th>South America</th>
<th>Central America</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ghana</strong></td>
<td>1</td>
<td>Argentina 4</td>
<td>Belize 25</td>
</tr>
<tr>
<td><strong>South Africa</strong></td>
<td>3</td>
<td>Bolivia 8</td>
<td>Costa Rica 22</td>
</tr>
<tr>
<td><strong>Tanzania</strong></td>
<td>2</td>
<td>Brazil 2</td>
<td>El Salvador 20</td>
</tr>
<tr>
<td><strong>Uganda</strong></td>
<td>1</td>
<td>Chile 2</td>
<td>Guatemala 17</td>
</tr>
<tr>
<td><strong>Zambia</strong></td>
<td>1</td>
<td>Columbia 14</td>
<td>Honduras 45</td>
</tr>
<tr>
<td><strong>Zimbabwe</strong></td>
<td>1</td>
<td>Ecuador 20</td>
<td>Nicaragua 27</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Peru 2</td>
<td>Panama 48</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Uruguay 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Venezuela 8</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>9</strong></td>
<td><strong>61</strong></td>
<td><strong>204</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Other Countries/Islands</th>
<th>North America</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Christmas Island</strong></td>
<td>1</td>
<td>Canada 20</td>
<td>Australia 2</td>
</tr>
<tr>
<td><strong>Mauritius</strong></td>
<td>1</td>
<td>Mexico 18</td>
<td></td>
</tr>
<tr>
<td><strong>New Zealand</strong></td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Philippines</strong></td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>5</strong></td>
<td><strong>38</strong></td>
<td><strong>2</strong></td>
</tr>
</tbody>
</table>

**GRAND TOTAL:** 506
Office of Annual Giving Mission –

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 Giving program.

The Loyola Fund –

The unrestricted annual fund dollars are a part of the operating budget of the university. These vital, unrestricted dollars support every student by bridging the gap between tuition revenue and the actual cost of providing a Loyola education. Each year, all members of the university community—trustees, alumni, parents, board members, faculty, staff, students, and friends—are asked to support the university with a gift to the Loyola Fund. An unrestricted gift to the Loyola Fund allows the University to meet its goals and direct resources where needed most.

Opportunities to Give –

The Annual Giving program solicits support through the following methods: Direct Mail & Email Campaign, the Phonathon Campaign, Faculty Staff Campaign, Senior Class Gift Campaign, Parent Giving Campaign, and Loyola Society Leadership Giving.

Direct Mail & Email Campaigns

- Loyola’s direct mail campaign program sends out over 120,000 pieces each fiscal year. From these mailings unrestricted and restricted gifts are secured annually for the university and its colleges. These mailings are coordinated with Office of Marketing and Public Relations and used as information pieces as well as solicitation pieces. Generally, direct mailings are sent twice in the fall and twice in the spring to all alumni and friends.

- Loyola’s email campaign sends four annual email solicitations to over 20,000 alumni, parents, and friends of the university (for whom we have valid mailing addresses). Social media (Facebook, Twitter) is also utilized to encourage donors to support the university.
**Phonathon**

- The Phonathon program serves as a means for alumni, parents and friends to make an annual pledge of support to the university. Alumni, parents and friends can also obtain information about university news and events, ask questions, offer suggestions, and update their contact information. The Phonathon program works to build and strengthen the relationship between Loyola alumni, parents, and friends and current students, while simultaneously generating monetary support.

**Faculty Staff Campaign**

- The goal of the Faculty and Staff Campaign is to raise gifts and pledges that support Loyola. The main campaign objective is not to raise a certain amount of money, but is to encourage all faculty and staff to contribute at a level at which they are comfortable. When faculty and staff show their support, it demonstrates to alumni and friends that those closest to the university believe in the mission and encourages them to do the same.

**Senior Class Gift Campaign**

- The Senior Class Gift Campaign is a student-led campaign to raise money for Loyola. This tradition, dating back to 1998, unites seniors to give back to Loyola in support of undergraduate education. The main purpose of the campaign is to educate students on the need to support financially their alma mater. Previous gifts have included the Jesuit Ideals Walkway, the Hurricane Katrina Memorial in the University Sculpture Garden, and need-based scholarships for undergraduate students.

**Parent Giving**

- Gifts from parents support acquisitions for the university library, athletics, information technology, and the purchase of scientific and technological equipment. Parents are contacted by students during the Phonathon Program and parents also write letters on behalf of the university to solicit other parents for gifts.

**The Loyola Society**

- The Loyola Society is a select group of leaders who contribute annual gifts of $1,000 or more to the university. Members of the Loyola Society are recognized annually in the online Donor Honor Roll, invited to campus for special events, receptions, and lectures throughout the year, and are invited to events with deans or faculty in alumni chapters around the country. Annual Giving staff also solicit potential donors one-on-one at this level of giving.
The Office of Marketing and Communications works to translate Loyola’s mission and work into a message that attracts new students, donors, and friends who are excited to join the university in its work. The university’s integrated marketing strategy results in a website, publications, and general communications efforts that offer a distinctive Loyola image and branding that increases the profile of the university’s students and faculty in the wider community.

This department is responsible for establishing and enforcing communication and media relation policies to ensure that all official Loyola publications, both print and online, and external communications project a consistent editorial and graphic identity that upholds the image of the university.

The Associate Vice President (AVP) of Marketing and Communications supervises the university’s official integrated marketing communications program through the offices of Creative Services, Web Communications, and Public Affairs. The AVP is charged with the responsibility of creating and enhancing the overall institutional image and brand to achieve university goals and objectives.

---

**WHAT WE DO**

- Branding and Positioning / Graphic Identity
- Official University Messaging
- Crisis Communications / Media Relations
- Official Communication Policies
- Special Events Coordination
- Strategic Marketing

**DEPARTMENTS**

- Advertising, Promotions and Marketing Strategy, Alumni Publications (CREATIVE SERVICES /CS)
- New Media/ University Website (WEB COMMUNICATIONS /WEB)
- Public Affairs, External Relations and Special Events Coordination (PA)

---

- Responsible for the implementation of university-wide marketing strategies that incorporate media relations, media buying, promotional videos, direct mail, advertising, special events, event promotion, and web-based promotion (AVP).
• Responsible for establishing and managing the budget for the university’s official publications, advertisements, and events, including Centennial (AVP).

• Assist admissions recruitment, fund development, and alumni events (ALL).

• Work with vice presidents, deans, administrators, and department heads to facilitate marketing communications strategies and implementation/purchases for their specific areas, including publicity, media buying (ALL).

• Responsible for the communication effort associated with the Faith in the Future Campaign.

• Responsible for producing (writing, editing and designing, printing and mailing) three official alumni magazines for the university: Loyola University New Orleans Magazine, Loyola Executive and the Loyola Lawyer (CS).

• Responsible for producing or approving all official publications and advertising required by all divisions and departments (CS).

• Develop and manage online graduate recruiting strategies and implementation (CS).

• Annually produce over 850 university publications including brochures, catalogs, posters, signage, newsletters, invitations, advertising, recruitment and commencement materials, and promotional videos, among others (CS).

• Photography services for publicity, publications, and stewardship purposes (PA).

• Manage and coordinate donor and alumni-related events, and special events such as inaugurals, dedications, and commencement exercises (PA).

• Disseminate official university, student, faculty, and staff announcements internally and externally to local and national media (PA).
  
  o LoyNews, a weekly e-newswire that targets news media, and Loyola at a Glance, a weekly e-newsletter sent to faculty, staff, and students

• Responsible for university crisis communications planning, training, and implementation (PA).

• Coordinates official internal and external communications and media relations for the university and the president (PA/WEB).

• Design, program, maintain and/or oversee the official university website (22,000+ pages) to market the university to various constituents (WEB).

• Provides technical support and training to departmental web administrators; updating of web content is the responsibility of colleges, departments, and centers (WEB).

• Creates websites, online graphics and forms, information architecture, e-newsletters, blogs, social media branding, internet ads and more (WEB).

• Design and account set up for official university e-newsletters (WEB).

• Develop and oversee implementation of university social media strategies (WEB).
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.
Introduction

The following policies and procedures are set forth: (a) to define the working rules for fundraising at Loyola University New Orleans; (b) to protect the university, its Board of Trustees, staff, and volunteers; and (c) to inform the university’s advisers, donors, and prospective donors.

It is the general policy of Loyola University and its Board of Trustees: (1) to offer diverse opportunities for gift support of the university; (2) to communicate such opportunities to constituents on a regular basis; and (3) to provide the resources for a full and effective development program for the benefit of both donors and the university.

The Office of Institutional Advancement is the clearinghouse for all fundraising activities of the university. It shall be the responsibility of the Office of Institutional Advancement and its staff, under the direction of the president of the university:

A. To maintain and increase financial support for the university;

B. To develop and propose to the Board of Trustees plans for a comprehensive development program, including annual, capital, and planned gift efforts;

C. To advise the Board of Trustees, senior staff, and other volunteers on matters relating to the cultivation, solicitation, and acceptance of gifts and grants in support of the university;

D. To inform, serve, guide, and assist the university’s constituents in fulfilling their family, financial, and philanthropic objectives;

E. To coordinate all fundraising efforts as may involve the several constituencies (Trustees, staff, friends, alumni, corporations, foundations, etc.) of the university by matching donor interests with specific funding opportunities so that prospects and donors are not solicited by multiple individuals on behalf of the university;

F. To undertake research on prospects and donors so as to identify donor interests and to maintain confidentiality with regard to research findings and donor records; and
G. To report regularly to the Board of Trustees regarding gifts, grants, pledges, and planned gift commitments received by Loyola University.

I. General Policies and Guidelines

A. Loyola University welcomes expressions of interest and financial support, regardless of size or form, from any individual, family, business, corporation, foundation, or similar source. The development office staff and volunteers are available to meet with any prospective donor(s) and their financial advisers, without obligation, to discuss areas of interest, the plans of the university, types of gift commitments, options for payment, estate planning, and the tax planning consequences of a possible gift commitment so as to provide every possible assistance to a prospective donor.

B. Gifts to the university should be made in the name of Loyola University New Orleans. All gifts to the university should be directed in their entirety (including envelope, check, and written correspondence) to the Office of Institutional Advancement, where they will be accepted, acknowledged, and administered in accordance with the policies of the administration and the Board of Trustees.

C. No solicitation of donations or gifts of funds or real property for the benefit of the university shall be made by anyone without the approval of the president of the university, vice president for institutional advancement, or his/her designated representative.

D. Commitments to Loyola University and/or payment of same may take the form of one, or a combination, of the following:

- Cash;
- Multi-year pledges;
- Appreciated securities or other personal assets;
- Deferred or planned gifts including:
  - Trusts,
  - Annuities,
  - Insurance policies,
  - Gifts of residence with or without a retained life interest,
  - Bargain sales
  - and/or
  - Bequest intentions

E. The president of the university, vice president for institutional advancement, or vice president for finance shall have authority to sign planned giving agreements on behalf of the university. Any agreement that does not follow the format of the specimen agreements or otherwise meet the requirements of the current
guidelines shall require the approval of the Institutional Advancement Committee of the Board of Trustees.

F. The Board of Trustees and/or appropriate university officers as authorized by the president of the university reserves the right to accept (or, in cases where absolutely necessary, to decline) any commitment that is offered to them. They also reserve the right to determine how any commitment will be credited and/or how such commitments will be recognized.

Requests by donors for anonymity will be honored.

G. Although representatives of Loyola University will provide all appropriate assistance, the ultimate responsibility regarding asset evaluations, tax deductibility, and/or similar federal, state, and/or local legal compliance issues rests with the donor(s) and/or with such financial advisers as the donor(s) shall secure.

All donors need competent financial advisers, and representatives of the university will always recommend potential donors obtain such assistance.

H. The university will not knowingly seek, nor accept, any commitment regardless of size, designation, or other condition, which it believes is not in the potential donor’s best interest.

II. **Policies Pertaining to Certain Types of Commitments**

Gifts shall be valued on the date the donor(s) relinquished control of the assets in favor of the University. In cases where gifts are made with assets other than cash, the following guidelines will be observed:

A. Gifts of publicly traded securities will be receipted at the average of the high- and low-market value on the date the donor relinquished control of the assets in favor of the university or other valuation techniques approved by the IRS; such securities will be conveyed to the university’s business office for sale, consistent with the established policies of the university.

B. Gifts of closely held stock will be receipted at the per-share cash purchase price of the most recent transaction. Normally, this will be the buyback transaction of the donor. If no buyback is consummated during the campaign period, a gift of closely held stock may be credited to campaign totals at the value determined by a qualified independent appraiser. All such gifts of closely held stock will be held until liquidated, at which time the funds will be used consistent with the gift intentions of the donor and the established policies of the university.
C. Outright gifts of real estate, bargain sales, and/or partnerships will be credited, recognized, and/or commemorated at fair market value at the time it is transferred to Loyola University, less any encumbrances. The fair market value of the property shall be determined by an independent, qualified appraiser paid for by the donor. Appropriate environmental hazard appraisals are also required and are to be paid for by the donor.

Gifts of real estate must be accepted by Loyola University in accordance with statutory requirements governing the university’s acquisition of real property.

Outright gifts of hard-to-value assets such as mineral rights or limited partnerships will be credited at $1, and additional credit will be given as the proceeds are received.

D. Outright gifts of tangible personal property for which donors qualify for a charitable gift deduction under current IRS rules will be credited, recognized, and/or commemorated at the appraised value of the property at the time it is transferred to Loyola University, less any encumbrances. Unless otherwise authorized by the Board of Trustees, the university will seek to liquidate such assets in order to secure the cash needed to fund its programmatic and/or facility priorities and/or to invest such assets in ways consistent with the currently authorized investment strategies of the university. The preceding sentence shall not apply to gifts of tangible personal property intended by both the donor and Loyola University New Orleans to be retained for the use of the university.

The following are general guidelines or considerations in connection with gifts of tangible personal property:

(1) Generally, the university’s acceptance of such gifts cannot involve significant additional expense for their present or future use, insurance, maintenance, or administration.

(2) Generally, no burdensome financial or other obligations can be incurred, directly or indirectly, by Loyola University as a result of its acceptance of such gifts.

(3) Gifts of real and personal property (land, houses, jewelry, paintings, antiques, rare books, etc.) exceeding $5,000 in value shall be reported at the fair market value placed on them provided that the university receives a copy of the appraisal conducted by an independent, expert appraiser, paid for by the donor, at the time the donor relinquished control. Gifts of $5,000 and under may be reported at the value declared by the donor or a qualified on-campus expert (e.g., librarian, art professor, etc.).
(4) The university will not accept gifts of tangible personal property (such as books, paintings, etc.) if such gifts are to be made on the condition, understanding, or expectation that the gifted items will be loaned to the donor or to persons designated by the donor for life or for an extended period of time as determined by the donor.

(5) Any gifts-in-kind which could be liquidated will be credited on an item-for-item basis.

E. Fully paid up, or otherwise vested, insurance policies for which Loyola University is owner and sole beneficiary will be credited and recorded as "future" expectancies of the university at the unrealized death benefit (face value) of the policy in cases when the insured is age 65 or greater, and at the replacement value for donors younger than 65.

F. Bequest intentions, commitments of unpaid insurance policies, and other revocable deferred gifts will be recorded as "future" expectancies of the university at the value established in writing by the donor through a bequest intention form, a deferred pledge agreement, a contract to make a will, a letter, or a copy of appropriate sections of the will or of the insurance or trust document, etc.

(1) Such revocable gift commitments will be permanently commemorated, subject to the donor’s specific request and intent, only when the funds are irrevocably committed to the university or when the gift matures. The preceding will not apply to commemoration of planned gifts through membership in any planned giving recognition society; the Heritage Society, as an example.

(2) Bequest intentions for which the donor does not indicate a specific gift value and/or does not provide an estimate of a residuary bequest will be credited as future expectancies at a minimum value level of $1,000.

G. Bequests will be credited to any university campaign attainment figures as received, if not reported in a previous campaign. Such bequests will be credited, recognized, and/or commemorated at the value established at the time of probate and/or at the fair market value on the date of the transfer of the asset(s). If any portion of the total amount was previously entered in prior campaign "future" expectancies as a testamentary pledge, this amount shall be subtracted from what is credited to the "future" reports of the new campaign. New bequest expectancies will be credited to the campaign attainment figures at the level designated by the donor if the donor is or will be age 60 or greater by the end date of the campaign. Bequest expectancies from donors younger than 60 years will be credited at the actuarial value.
H. All gifts that will, or may, require expenditure of funds either at the time of the gift or at some future date (e.g., non-performing assets gifted to fund a charitable trust or charitable gift annuity, bargain sales, or outright gifts such as real estate that may impose present obligations on the university) shall require the approval of the Endowment or Institutional Advancement Committees of the Board of Trustees.

I. Gift annuity, irrevocable charitable remainder trusts, and similar life income agreement commitments (whether administered by the university or by others on behalf of the university) will be credited, recognized, and/or commemorated as follows:

(1) At the fair market value of the asset (on the date of transfer, less any encumbrance) being used to "fund" the life income agreement in the case of charitable remainder unitrusts, annuity trusts, and charitable gift annuities for life beneficiary or beneficiaries age 60 and greater at the time of their first life income payment.

(2) In the case of charitable lead trusts, at the total anticipated payout over the pledge payment period plus (for commitments made during any campaign period) the present value of any remaining income interest.

For purposes of current income tax deductions, such gifts will be receipted at the charitable deduction value as established by law.

Generally speaking, the university does not encourage donors to place encumbered assets into a trust.

When a trust is to be funded with hard-to-value or non-income-producing property, a net income unitrust will generally be used. Such a trust obligates the trustee to pay only the lower of a specified percent of fair market value or actual income. When such a net income unitrust is used, a separate letter of agreement should be signed by the president of the university and the donor, indicating that the donor understands the income concept of the net income trust. A "catch-up" provision as allowed by a unitrust may also be acceptable.

III. Administrative Procedures Relating to Certain Planned Gifts

A. For Life Income Agreements

(1) Proposed charitable gift annuities should be funded initially with assets of at least $10,000 consisting of cash or marketable securities.

(2) The interest rate used in preparing life income agreements will be as follows:
a. For charitable gift annuities, no higher than the rate recommended by the American Council on Gift Annuities.

b. For unitrusts and annuity trusts, a rate of at least five percent. Higher rates may be approved by the Endowment Committee of the Board, based on:

(1) The ages of the donor and any beneficiaries; and (2) income needs vs. tax relief. However, the director of planned giving will be given authority to negotiate rates on charitable gift annuities, charitable remainder unitrust, and charitable remainder annuity trusts, provided that such rates be within one percentage point of the maximum rates recommended by the American Council on Gift Annuities effective at the time of the gift or the establishment of the trust. Charitable remainder trust will be marketed with a rate slightly lower than charitable gift annuities because of the higher administrative costs. In the event that the rate does not fall within the limitations above, the director of planned giving will obtain the approval of the vice president for institutional advancement. Any such deviation from this policy will be reported to the Endowment Committee at its next regularly scheduled meeting.

(2) Funds received for annuities and trust agreements are administered by the director of planned giving. Separate accounting is provided to the donor on each life income agreement. Annuity or trust payments shall be made at the donor’s choice: monthly, quarterly, semi-annually, or annually. In order to control the cost of trust and annuity administration, Loyola University prefers to make payments quarterly or semi-annually.

B. For Charitable Remainder Trusts

(1) Proposed charitable remainder trusts should be funded initially with assets of at least $50,000. Trusts may be established for lesser amounts if it can be determined that the charitable remainder portion of the gift is sufficient to handle the administrative costs and provide a substantial future gift to the university.

(2) Trusts should be limited to one or two income beneficiaries and to beneficiaries over 40 years of age (unless some generous outright gift is combined with the trust, in which case trusts can include younger beneficiaries).

C. For Retained Life Estates

The gift of a primary residence, a vacation home, or a farm with retained life interest on the part of the donor shall be arranged without a trust agreement.
The donor deeds the property to Loyola University immediately. Calculation of the remainder interest, which is allowed for federal income tax deduction, is based on an IRS formula.

D. For Life Insurance

Gifts of life insurance may be accepted by the university after ownership is transferred to the university, the university is named beneficiary, and cost and/or replacement value has been established by the insurance company.

IV. Policies Pertaining to Named Endowment Funds

A. For the purposes of this policy statement, "endowment fund" shall refer to any fund, or any part thereof, not wholly expendable by the university on a current basis under the terms of the applicable gift instrument.

Endowment funds are invested according to policies established by the Board of Trustees.

B. Endowment gifts may be used to establish a special endowment fund or may be added to an existing endowment fund.

C. Persons interested in establishing a named endowment fund are encouraged to consult with the vice president for institutional advancement prior to making the gift so that the donor’s intentions are appropriately established in writing through a gift agreement. Negotiation of any named endowment agreement on behalf of the university shall be done over the signature, and with the full knowledge, of the president of the university.

In designating an endowment gift for a specific purpose, the donor is encouraged: (a) to describe that purpose as broadly as possible; (b) to avoid detailed limitations and restrictions; and (c) to provide a clause granting the university maximum flexibility to make use of designated funds in a manner most consistent with the intent of the donor and with the interests of the university should programmatic or other developments make it impossible to apply the endowment proceeds to the purpose for which it was designated originally.

D. Gifts to established named endowment funds for specific purposes must meet the minimum dollar requirements set by the Board of Trustees. The principal amount of the original gift need not meet the minimum dollar requirement if the donor agrees to fully fund the endowment at the minimum dollar requirement within a specified and reasonable period of time. Minimum dollar requirements may be changed from time to time at the sole discretion of the Board.
The minimum dollar requirements established by the Board of Trustees for a named endowment fund shall not apply to any named endowment fund(s) already established at the time these policies are adopted.

Loyola University reserves the right to review the minimum amounts required for named endowments periodically and to amend the minimum amount required so as to ensure that endowment proceeds are sufficient to fund the intended purpose(s) of the endowment. If and when the university acts to increase the minimum amount required establishing a particular named endowment fund, such action shall not be retroactive to funds already established and named.

E. Endowed funds that have not reached the minimum level after a period of five years will be released from the endowment fund and the funds raised will immediately be available for the purposes of current use, to the designation originally agreed upon in the gift agreement.

Endowed funds will be held in a holding account until they reach the minimum level.

V. Policies Specific to Campaigns

A. Gift and pledge commitments made during a campaign will be counted toward campaign totals if such commitments have not been counted toward a previous campaign goal.

B. Pledges of outright gifts should be written and should commit to a specific dollar amount that will be paid according to a fixed time schedule. The normal pledge period for outright gifts is three years; pledges of $5,000 or more may be made over six years.

C. A minimum of $25,000 is required for a fund to be endowed. Some endowed purposes will require a larger minimum (i.e. professorships, and chairs).

(1) The minimum endowment level for a professorship is $100,000. Some professorships are eligible to be matched by a grant from the Louisiana Education Quality Support Fund Endowed Professorship Program sponsored by the Endowed Professorship Program of the Louisiana Board of Regents. Once $60,000 000 in non-state monies has been raised, $40,000 may be matched by Support Fund dollars or supplemental state dollars.

(2) The minimum endowment level for a chair is $2,000,000. Some chairs are eligible to be matched by a grant from the Louisiana Education Quality Support Fund Endowed Professorship Program sponsored by the Endowed
Professorship Program of the Louisiana Board of Regents. Once $1,200,000 in non-state monies has been raised, $800,000 may be matched by the Support Fund dollars or supplemental state dollars.

D. During the multi-year campaign period, prospective donors may be asked to make an annual gift commitment and a capital gift commitment to the university, payments on which will be allocated to the annual and/or capital needs of the university according to policies established by the Board of Trustees. In some cases, the prospective donor(s) may also be asked to consider a deferred or planned gift to the university.

E. All gift and pledge commitments, regardless of size and designation, are welcomed, and Loyola University will provide all possible staff and volunteer assistance to potential donors to discuss the university’s funding priorities, the donor’s interests, etc. However, gifts of immediate cash or negotiable securities are the forms of donor commitment that have the greatest impact on the university and its plans for the immediate future.

The rationale and urgency surrounding facility and endowment priorities reflected in the campaign commend timely funding to assure a strong future for Loyola University. Cash, negotiable securities, and commitments of similar assets are those that can most immediately be applied to the current funding priorities of the university.

F. Campaign reports shall always present: (1) the total of outright gifts and pledges received and payable within the campaign period and post-campaign accounting period as specified above; (2) the total of deferred (future) commitments which will be received at an undetermined time in the future; and (3) the grand total of all commitments, outright and deferred, being credited to the campaign.

G. No verbal pledge commitments will be included in reported campaign totals. Either a signed pledge card or letter of intent must be filed with the development office before a pledge commitment is reflected on campaign reports.

H. Many contributions to the campaign will be "unrestricted" in nature. However, any donor has the option to "restrict" some, or all, of his/her gift commitment to any particular campaign component.

I. Commitments of term insurance naming the university as beneficiary will not be counted in campaign attainment figures.

J. Irrevocable gift commitments which mature during the course of the campaign will be credited immediately to outright campaign attainment figures.
K. Bequest intentions for which the donor does indicate a specific, or estimated, value and for which the donor provides written confirmation will be recorded at full value, consistent with limitations of age as described in Section II. G.

L. Campaign commitments are invested according to policies established by the Board of Trustees.