As we move to the close of another academic year, we continue to focus on the implementation of *Loyola 2012*. I think you will find, from this Report and the materials for the meeting, we are moving along in terms of implementing the strategic plan and the renewal of the University. It has been a year since the Board approved *Loyola 2012*. I think you will find from our reports that we have begun the necessary work of implementation.

### 1. Enrollment

Fall 2010 admissions activity has set records for the University. We now have our largest pool of first-year applications, 5079 as of this writing. We expect that number to reach at least 5150 by the Board meeting in May. The previous high mark was attained last year, 4200. Therefore, our new mark positions us better than at least 22% ahead of our old one; acceptances for first-year students are about 20% higher, too, and should challenge previous highs by this admissions cycle’s end. Transfer applications are also ahead of last year at this time, 490 v. 426, a difference of about 15%. We expect to continue to see strong transfer activity through the spring and early summer.

We just hosted our annual President’s Open House which is an annual reception for accepted students. This year 350 families toured the campus, met with faculty, talked to students, and used the day to inch closer to making their final fall 2010 enrollment decisions. Overall, visits to campus continue to increase, and this year’s projected class of 2010 final visit count reflects a gain over last year of more than 12%, 2025 v. 1807.

Growing our application pool (increasing the demand) is an essential element of the strategic plan as it allows us to enroll diverse and talented classes, meet our budget targets, and shape our enrollment into strong cohorts that both persist at high levels and, in time, produce excellent graduate rates. We will work hard to keep the current trends in demand intact for fall 2011 and beyond.

The continued effects of global economic recession are another reason strong demand is so critical. We continue to expect to enroll this year’s budgeted class of 800 new fulltime first year students and 125 new fulltime transfer students, but we know that many students and families are struggling to make ends meet this year and we have had to be creative and deliberate about how we award financial assistance as we also work to reduce the university-wide discount rate. As we have said we expect to enroll the fall 2010 class at a discount about 3% less than the fall 2009 class. The budget reflects this effort.

While deposit commitments for fall 2010 enrollment are arriving at a reasonable pace, deposit activity remains very fluid in April (nationally, deposits are due on May 1). So, we will have a better sense of where the fall 2010 class will “land” at the Board meeting and Sal Liberto will provide to the Academic and Student Affairs committee a thorough update regarding where we stand.

**Retention efforts** have continued to keep pace. Registration activity for the fall semester is better – both in terms of headcount and percentages of students registered – than last year at this time. We have noted retention improved in fall to spring enrollment: 95 percent; compared to 92 percent last year. We expect, despite the challenges in the current economy, to be able to challenge last year’s fall to fall retention figure of 80% because we have spent a great deal of time strengthening our first year experience program, building new processes for developing and mentoring students after the first year, connecting with parents and students during the first year transition, and augmenting early warning processes to get students back on track quickly when stumbles occur. All of these efforts require vigilance year in and year out, so I am
pleased that they have been codified within the strategic plan and the units that individually and collectively bring these plans to fruition in these very important years of implementation. We will also have fresh updates on student persistence in the Academic and Student Affairs Committee.

With respect to our graduate programs, we continue to make positioning for the future a priority and several committees have been hard at work unifying a vision on enrollment growth and management, delivery, marketing, and campus coordination in the areas of continuing and professional studies, graduate education, and online learning. The time is now to ensure that we have a shared vision going forward and much of the work this year has been to align processes and academics to make sure that Loyola can increase its program offerings and graduate enrollments in a strategic, efficient, and mission-driven way.

Loyola has just approved the Yellow Ribbon "kicker" for our graduate students and 10 law students and we removed the cap from our eligible undergraduate students. The Yellow Ribbon program is Post 9/11 GI Bill of Rights. This is a full-pay program for students who qualify. It is also the only educational benefit that parents can give to their spouse or children.

2. Academic and Student Affairs

The programming phase for the new student center/residence hall and Monroe Hall renovations is near completion. In this phase, the university’s facilities planning consultants worked with faculty, staff, and administrators who will be affected to identify all the requirements for each space in the buildings. Planning is also moving forward for some space in the Communications/Music Complex and for the new Jesuit Center (old library) and Marquette Hall. In early April, the Requests for Qualifications (RFQ) for the new student center/residence hall and Monroe Hall were sent to approximately 35 architectural firms and we anticipate selecting two lead architects, one for each project, by June 1. With the selection of lead architects, we will begin detailed construction planning for Phase II of the Master Plan.

The University Planning Team (UPT) is meeting with representatives from the Kor Group (see Institutional Advancement), and once the consultants’ study is complete, UPT members will review the findings which will then become the basis for wider discussion on our reputational identity.

Our committee structure continues to operate effectively and cooperatively. The University Faculty Handbook Revision Committee is working toward a final recommendation on committees outlined in the Faculty Handbook. This Committee has also been working on editorial changes to the Faculty Handbook that reflects the current university structure. In addition, they have recommended several procedural matters affecting faculty that will be submitted for approval through the Academic and Student Affairs Committee.

The University has heard from the International Board of Directors of the Association to Advance Collegiate Schools of Business (AACSB), who informed us that the 6th Year Review Team's recommendation to extend accreditation of the business degree programs offered by Loyola has been concurred with by the Maintenance of Accreditation Committee and ratified by the Board of Directors.

3. Mission and Ministry

We are moving on the Center for Volunteer & Public Service. Jesuit Center Fellow, Scott Porot, has begun formulating the specific goals of the Center, staffing needs, and a projected budget. We have applied for a grant for a reflection component and are working with Tulane on a transportation sharing agreement. We are exploring space needs and foundational funding sources.

In an effort to enhance mission and identity with faculty and staff, we will hire a full-time staffer to facilitate faculty and staff development, including exploring ways to link Jesuit values with pedagogy,
expansion of retreat and service programs for faculty, staff (and alumni), and an Ignatian pilgrimage to Spain next summer.

In the larger Loyola community, we also are seeking further development in the area of mission & identity of the Board and alumni with retreats & service offerings. In the internationalization area, we are seeking further links with Belize and with other Caribbean & Latin American countries and a greater collaboration with the Center for International Education.

In University Ministry, we are expanding our initiatives in sustainability and broadening our projects in faith & justice. We are developing a comprehensive four-year retreat program and changing our approach & outreach to interfaith support for our students.

4. Finance

Bond Ratings and Bond Sales:
As we prepared to go to the bond market to begin the first phase of construction for the master plan, we were reviewed by the leading credit agencies. Both Moody’s Investors Services and Standard & Poor’s Rating Services have issued positive ratings to the 2010 bond issue.

Standard & Poor’s Rating Services assigned its A+ long-term rating to the Louisiana Public Facilities Authority’s series 2010 revenue bonds issued on behalf of Loyola University. At the same time, S&P reaffirmed its A+ underlying rating (SPUR) on the university’s series 2006 bonds. Moody’s Investor Service has assigned an A1 rating to the university’s revenue bonds, Series 2010 issued through the Louisiana Public Facilities Authority. At the same time, Moody’s also affirmed the A1 rating on the university’s series 2006 bonds.

Both Moody’s and Standard & Poor’s view the university as “stable.” The stable outlook reflects the agencies’ expectation that the university will maintain a strong balance sheet cushion for debt and operations, robust liquidity, and continue to improve enrollment trends and operating performance.

These positive ratings are based on the assessment of the university’s:

- Strong leadership team with solid planning and fiscal management.
- Increases in applications, acceptance, and matriculation rates.
- Solid financial resources, with cash and investments.
- Healthy endowment.

Bond ratings are a factor in determining the cost of capital for the university when borrowing funds. Loyola recently secured approval in February from the Louisiana State Bond Commission to issue $35 million in revenue bonds for capital improvements at the university, including a renovation to Thomas Hall and a two-floor addition to the West Road Parking Garage. The bonds issued in 2006, currently outstanding in the amount of $38.5 million, were secured to refinance earlier bond issues.

In late March, we went to market with our bonds for the first phase of construction. The university’s bond offering was met with strong demand from investors, including funds such as Eaton Vance and Franklin Templeton, which helped lower the deal’s all-in TIC (True Interest Cost) to an attractive rate of 4.707 %. The bonds are structured for 30-year level debt service with the average annual debt service on the bonds.
being $2.293 million. The university closed the bond sale on March 24, 2010. The bond premium yielded gross proceeds of $36,615,000 from the sale of the $35,000,000 bond issue.

The University received a net of $34,348,000 from the sale of the bonds. The funds received were net of the bond premium, underwriter’s discount, bond issue costs and capitalized interest.

This is extremely positive news for us and is an indication of the university’s strong financial health.

**2010-11 Budget**

The budget proposal as recommend by the University Budget Committee for fiscal year 2010-2011 is based on an incoming undergraduate class of 800 new students with an additional 125 transfers and readmits for a total of 925 new/readmits. The retention rate in the budget is 79%. Law revenue is based on a class of 840 students.

The recommended increase to tuition for all new and returning undergraduates and law students is 5.9%. Residence Hall room rates and meal plans are including 6% increases. New Revenue for strategic initiatives such as a Doctor of Nursing program, and Masters of Criminal Justice are included in the Revenue budget. These strategic initiatives represent an increase in funding of $1.2 million over 2009-10.

Given these assumptions, the university expects to complete the FY 2010-2011 with a deficit of $2.2 million to be offset by Business Interruption insurance while maintaining a 5% draw on the endowment.

**5. Construction**

It is evident around campus that we have begun the first phase of the implementation of the master plan (See: [http://www.loyno.edu/provost/documents/LOYOLAMPDRAFTFINALBOTcomp.pdf](http://www.loyno.edu/provost/documents/LOYOLAMPDRAFTFINALBOTcomp.pdf) ) as you know, part of this first phase will address some serious deferred maintenance issues that have accumulated in the past years. Now, as we begin new construction, is the opportune time for us to address some of these problems, and they must be addressed before we begin the second phase of construction, which will involve a new student center and residence hall. As we move forward, there will be a budget line for maintenance so that we do not accumulate these deferred problems in the future.

The contract has been signed for the renovation of Thomas Hall, and work has begun. Construction is scheduled to be completed by the end of this year.

We plan to go out to bid, in May, for the additional floors for the West Road Garage. The additional 236 spaces are necessary before we begin work on a new residence hall in the second phase of the master plan. We expect the construction to last approximately 10 months. The garage will remain in operation, close to full capacity, while the construction is underway.

On a less glamorous note, four out of five Central Plant cooling towers were replaced last month, and work is ongoing on other improvements to the plant and related campus infrastructure. These upgrades will allow us to move forward with current and future projects as outlined in the master plan. The roof of the old library was replaced. Work is continuing on the repair of the exterior stonework at Holy Name of Jesus Church.

Plans are also being finalized, and preliminary site work is underway, for the renovation of the former Dominican Conference Center on the Broadway campus. This space will be used by the College of Law as the new home of the Stuart H. Smith Law Clinic and Center for Social Justice.
In April, we have begun seeking proposals from architects for the design of a new student center/residence hall to be built where the Danna Student Center now stands, as well as for the renovation and expansion of Monroe Hall.

Requests for qualifications have been sent out to a number of local and national architectural firms for the second phase of construction which will involve the expansion of Monroe Hall and a new student center and residence hall.

**6. Environmental/Recycling**

LEED certification will definitely be achieved for both the Thomas Hall and Dominican Conference Center projects\(^1\).

In order to reduce Loyola University New Orleans’ impact on the environment, I asked Ed Kvet to form a Study Group on Campus Sustainability to assess the level of the university’s sustainable operations and suggest improvements.

The university currently responds to annual national questionnaires from the Princeton Review, Green Report Card, and the Peterson Report regarding its sustainable operations ratings. The grades received from each organization are being used to set a baseline for improvement, said Robert A. Thomas, Ph.D., professor and director of the Center for Environmental Communication.

The study group’s first responsibility was to assess current environmental activities on campus. Presently, the university is involved in the following green activities:

- All new construction and renovations on campus intend to meet Silver LEED Certification or better.
- A recycling program led by Kathy Anzelmo is in place and currently accepts office paper, manila folders, junk mail, paper bags, newspaper, magazines, aluminum, tin cans, cell phones, inkjets and toner cartridges. This program is a cooperative effort between LUCAP, Service Learning students, Physical Plant, and WFF Facility Services.
- This summer, Loyola will begin a “single stream” recycling effort, meaning that a wide array of recyclables will be placed in one container making such efforts much easier for the Loyola community.
- Information Technology is developing new policies and moving to new equipment that will make computers on campus more sustainable.
- The Study Group on Campus Sustainability is completing a campus-wide inventory of greenhouse gas production, led by Joelle Underwood. This is the first step in addressing Loyola’s role in releasing carbon into the atmosphere.
- The Loyola Association of Students for Sustainability (LASS) has recently been formed and is planning an Earth Day education event on April 21 about plastic bottles’ effect on the

---

\(^{1}\) LEED The Leadership in Energy and Environmental Design (LEED) LEED AP is an accreditation of professionals. Buildings are "designated" green, people are accredited LEED AP. The LEED AP is a US Green Building Council accreditation registration.
environment. A tap water tasting challenge will also take place to see if participants can taste the difference between tap, bottled and filtered water.

- Loyola students have attended and participated in several national meetings on college campus sustainability, such as the Ignatian Solidarity Network Teach-In led by Josh Daley, associate chaplain for University Ministry.

- Daley has also presented a proposal to administration entitled “Rebuild Loyola, Rebuild New Orleans.”

- Loyola is participating in the following state and national efforts:
  
  § Talloires Declaration: University Leaders for a Sustainable Future
  
  § American College & University President’s Climate Commitment
  
  § Louisiana Department of Environmental Quality Louisiana Environmental Leadership Program

- The Iggy Bike Project has been developed to allow students to pay a fee and have access to bicycles on campus. It will be launched in fall 2010.

- Loyola has teamed with Tulane to implement WeCar, a campus car-sharing program to help remove cars from the road.

- The Environmental Studies Program faculty is working on a proposal to have Environmental Studies and Environmental Science majors approved.

- The Physical Plant is consistently improving energy efficiency as they upgrade existing HVAC. Virtually any improvements they do on campus take Loyola to a higher standard of sustainability. They have also adopted a Statement of Environmental Responsibility.

- The sustainability study group is working with other divisions to develop and implement policies regarding sustainable operations: purchasing policies, investment policies, use of resources (such as paper, printers, and anything that is consumed).

- Sodexo is persistent in improving the sustainable operation of food services and reducing wastage of food.

- The Student Government Association has planted a Sustainability Garden next to Monroe Hall to provide members of the campus community with gardening space, supplies and information on sustainable practices.

- The university is gathering and dispersing leaf mulch to interested members of the campus community so all the yard waste that previously went to the landfill is now being used efficiently.

- A committee is working with Tulane to develop a public transportation program for students, faculty and staff.

- Loyola students can now access Tulane’s shuttles for free.

- Green jobs advising is done by the Career Center.

- Hollygrove Market comes to campus each week to sell fresh, local produce.

- Across campus, departments are changing paper forms into on-line forms.
- Residential Life does Freecycling, especially during move-out time. Items left by the students are made available to those in need.
- The purchasing department is now managing an office supply trading program that has reduced waste of important resources.

7. Institutional Advancement

As you know the search for a new Vice President for Institutional Advancement has been complete. Bill Bishop will formally join us on 1 August. (His resume is attached to this Report.) To insure a smooth transition Vicki Frank will work with Bill and be available to him in the future. Also, Bob Alsobrook, our consultant from GG&A will be a resource for him.

The main topic for the IA Committee will be a report from the Kor Group. The Kor Group, a national brand strategy and design company, has spent several days on the Loyola campus meeting with a representative cross section of the Loyola community. The team met with faculty, administrators, board members, staff, alumni, and students. The purpose of the discovery sessions was for the team to gain a deep understanding of the University – including its culture of philanthropy – in order to develop effective private phase campaign communications that resonate with potential donors. The group will make their initial report to the IA Committee at the May Board meeting.

8. Legal Affairs and Audit

Our Internal Auditor has been focused on a number of key projects:

1. All financial audits have been completed, including Gillis Long Poverty Center. We received unqualified opinions in all areas, with no issues.

2. I created and implemented a new risk assessment process which will allow me to select audits based on subjective risk assessment.

3. The following reviews have been completed, had issues but were resolved satisfactory:
   a. Cell Phone Review
   b. University Owned Vehicles
   c. Danna Center: Income

4. Cell Phone Expense Compilation is in process and will be completed in May 2010.

   The following reviews will be carried over to the 2010-2011 audit plan due to the risk assessment and Cell Phone Expense Compilation special projects:
   a. Residence Hall Occupancy
   b. ID Card Operation
c. Travel Expense

d. Major Gifts

9. Sodexo & Vendors:

As you are aware, in recent weeks there has been a lot of campus discussion about our contract with Sodexo and the efforts of the Service Industry Employee Union (SIEU) to organize the Sodexo workers.

On this issue, I remain committed to the position that the workers are free to unionize if they so choose. In January Dr. Petty, Vice President for Student Affairs and Associate Provost wrote: “As a Catholic, Jesuit university, Loyola recognizes the right of employees to organize. Whatever Sodexo and its employees decide to do regarding collective bargaining, the university will support them in their decision.” I remain committed to that position.

The discussions of the past few weeks have helped me to see that we need to have a clear, succinct policy on the business practices of our vendors. As a Catholic and Jesuit institution, we are committed to providing fair and competitive compensation packages and working conditions for all University employees and full-time contract workers who provide services on our campuses. While we can and do carefully monitor wages and working conditions for our employees, we do not have a clear policy framework for all the companies with which we do business.

I have established a University-wide committee to review our current policies, along with the best practices, for our contracts with vendors. I will ask the University Senate, the Staff Senate, the SGA, and the SBA each for a representative to serve on the committee. The committee will also have a representative from the Office of Mission and Ministry. I have asked Tommy Screen, my Assistant for Government Relations, to chair the committee. Gita Bolt, University Counsel, will assist the committee.

I have asked them to work, next year, to develop a clear articulation of our current policies and make recommendations to me for areas that are not covered. I will review the recommendations and make whatever decisions are necessary to move us forward.

10. Government Relations

At this time there are important pieces of legislation we are following and working on both the Federal and State levels.

Federal:

• Elimination of the Federal Family Education Loan (FFEL) program, in which the majority of student loans were issued and serviced by private banks.
• Under this legislation all student loans will be issued by the Department of Education, under the DIRECT LOAN PROGRAM – each institution must switch by July 1, 2010 – LOYOLA HAS ALREADY MADE THE SWITCH.

• Saves Federal Government $67.78 billion by eliminating the subsidies paid to private banks under the FFEL program – subsidies were paid by the government to banks to protect the banks against the unusually high rate of defaults on loans in the student loan industry. Essentially this legislation eliminates the middle man.

• Savings will be mostly applied to increase the maximum PELL GRANT award to $5,975 by 2017. Starting July 1st, the maximum award will be $5,550 until 2012-2013. Then, the increase will be tied to the inflation index.

• Students who borrow money starting in July of 2014, will be allowed to cap loan payments at 10% of their income and forgives remaining debt a student has after 20 years of timely repayment. Debt forgiveness will kick in at 10 years, if a student goes into public service – i.e. teaching, nursing, military.

State:

Our State Legislature is in Session. At this writing we are following several pieces of legislation.

• Capitation – Currently funded at $1 million dollars for FY ’10-'11 in the Board of Regents budget. This represents a 75% cut in funds since this time last year. This number is likely going to be cut even more by the regents. It is our hope at this time to just save as much as possible in light of the current budget scenario. As a reminder, Jay has zeroed out this line in our budget, so that anything we get from the state will be a bonus (that is confidential as I would hate for that information to get out to a state legislator).

• Law Clinic Bill – SB. 549 prohibits certain activities by law school clinics, including suing state government agencies etc.

Needless to say we are working with LSU, Tulane, & Southern in an attempt to defeat this legislation. However, it will be tough, because this is the Louisiana Chemical Association’s number one priority this session.

• Elimination of Board of Regents as Coordinating Board (HB 996 Tucker –Constitutional Amendment) According to the three Board of Regents’ members who met with Speaker Tucker on March 23, Speaker Tucker’s real goal is accountability; and if the Speaker believes such accountability can be achieved by another means, then he [Tucker] is willing to consider that. HB 996 is the only Constitutional Amendment filed on this subject matter. Given that Senator Ben Nevers, Chairman of Senate Education, filed SB 538 that strengthens the current Board of Regents instead of eliminating it, that HB 996 requires a 2/3 vote in each chamber, that no more C/A’s may be filed this session, and, that Speaker Tucker with his retribution for the pro-tem vote has caused unrest in the House, HB 996 will have a very difficult time winning passage.
We would like to see the Board of Regents stay in place as the coordinating board for higher education, because of the different programs we are already established in (i.e. – sponsored programs and endowed professors etc).

- **Capping TOPS Money:** HB 490 (Harrison) establishes from 2011-2016 a maximum TOPS award, excluding Honors and Performance stipends, of $1,600 per semester. SB 86 (B. Gautreaux) would limit the award to 90% of the tuition amount. The Governor has already said he does not support capping TOPS $$; the Taylor Foundation is also opposed.

  We are opposed to this legislation – certainly we will keep an eye on it and lobby to defeat any caps.

- **Guns- close-to-campus:** (HB 556 Wooton, SB 81 Martiny) Having been defeated last year by 85 nays -18 years to allow concealed weapons on college campuses, Representative Wooton’s legislation would remove the 1000 foot “firearm–free zone” for concealed weapons *vis a vis* school property/college campuses. As currently drafted, concealed weapons would still be prohibited on the campus property itself.

  Needless to say we will work to defeat this proposal – in fact, I’m not sure how much traction this bill will receive.

- **HB 532 (LoRusso)** would require all nonprofit organizations which receive public funds to maintain a financial report of all income and all expenditures.

  This legislation is not likely going to move due to the overwhelming amount of recordkeeping this would entail for all non-profits.

11. Civic Engagement

The work of the Ethics Review Board continues to be important. At this writing, as Chair of the ERB, I am serving on the search committee for an Independent Police Monitor, which is an office in the Inspector General’s Office. We had an excellent applicant pool of seventy five people and we have narrowed it to five. Those finalists will be in New Orleans for interviews by the search committee and there will be public sessions as well. We hope to conclude our work by the end of the month and make a recommendation to the IG.

A number of Loyola faculty members are serving on Mayor-elect Mitch Landrieu’s Transition Team. I am serving on the Health Care Task Force and the orientation for the new Administration of the Office of Inspector General and the Ethics Review Board. George Capowich, Ed Thornton, and Mike Cowan are serving on the transition team for Criminal Justice and Mike is also serving on the search committee for a new Police Chief.
QUALIFICATIONS FOR VICE PRESIDENT OF INSTITUTIONAL ADVANCEMENT

AREAS OF EXPERTISE

- Fundraising
- Planning, organizing, and executing capital campaigns
- Relationship building
- Management – financial and human resources
- Institutional communications – marketing, constituent, and public affairs

PROFESSIONAL HISTORY

Georgetown University, Washington, D.C.
January 7, 2008 – Present
Principal advisor to Georgetown University’s Vice President for Advancement and the Executive Vice President for Health Sciences for the full range of advancement activities undertaken on behalf of Georgetown University Medical Center.

Associate Vice President for Medical Center Advancement
- Collaborate with medical center leadership to establish strategic and philanthropic priorities and goals.
- Create and execute long-range and short-term plans for medical center development programs.
- Design, direct, and execute long-and short-term strategies to secure major gifts in support of prioritized programs and project objectives.
- Manage the medical center development operation with particular emphasis on hiring, training, and motivating staff.
- Manage an annual budget in excess of $3.2 million; supervise a baseline staff of 23.
- Organize, recruit, train, manage, and staff volunteer leadership.
- Prepare institution for $300 million fundraising campaign.

The University of Texas Southwestern Medical Center of Dallas, Dallas, Texas
May 2003 – December 31, 2007
Principal advisor to the President of The University of Texas Medical Center at Dallas for planning, organizing, and coordinating the Medical Center’s development program. Supervised a staff of 21; managed a budget of $1.5 million.

Vice President for Development
- Campaign manager for $500 million capital campaign.
  - Raised more than $400 million since assuming position of vice president for development in May 2003.
  - Provided administrative support to volunteer leadership consisting of approximately 100 of the most influential individuals in Dallas, Texas.
Directed the day-to-day fundraising activities for the Medical Center, which included solicitations of individuals, foundations, and corporations.
- Recipient of the 2005 and 2007 Council for Advancement in Support of Education Wealth ID Award for Educational Fund Raising: Overall Performance
- Recipient of The University of Texas System’s Chancellor’s Award for Fundraising Success on a Health Campus.
- Ranked 9th nationally among hospitals and medical centers for total private support in fiscal year 2005 by Philanthropy 400.
- Raised more than $135 million in FY 2006; more than $90 million to date in FY 2997 [ends August 31, 2007].
- Provided oversight to the Medical Center’s planned giving program.
  - Ranked above the national average for public specialized institutions for the number of realized bequests (10) and the amount ($6.08M) for 2005.
- Devised and implemented the Medical School’s annual alumni campaign by soliciting approximately 7,000 and raising more than $300,000.
  - Ranked above the national average for public specialized institutions for alumni donors as a percentage of alumni for record for 2005 [10.9%/8.2%].
- Managed the Medical Center’s acknowledgment process.
- Coordinated the fundraising activities for two external foundations.
- Developed management reporting systems for the successful monitoring of development activities, stewardship requirements, and activities of the volunteer leadership of the capital campaign.
- Served as the Medical Center’s Designated Endowment Compliance Executive – responsible for institutional compliance with donor restrictions on gifts and endowments.

Principal administrative and fund-raising advisor to the Secretary, American Battle Monuments Commission, and the Executive Director, NWWIIM Project (a $190 million capital campaign). Supervised twelve staff members.

Director of Administration and Development, April 1997 – May 2003
- Directed the solicitation of major gifts from constituency groups consisting of the following: corporations; foundations; civic, fraternal, and professional organizations; individuals; veterans’ services organizations; and grass roots organizations.
  - Coordinated and wrote the capital campaign fundraising master plan.
  - Implemented the strategic fund raising program that raised more than $33 million between January 2000 and November 2001 with direct costs of less than 10%.
  - Provided oversight to organization’s cause-marketing program and direct mail activities.
  - Provided extensive planning, staffing, and administrative support, with unfailing reliability, to the national volunteer leadership for the research and solicitation of major gifts.
  - Directed all activities relating to administrative support and management of the physical plant of the NWWIIM.
  - Established internal controls, processes, and procedures to ensure proper stewardship and accountability of more than $150 million of donor contributions.
  - Worked closely with the Chairman of the Finance and Policy Committee and provided management oversight for financial reporting to Board of Directors.
Established procedures for the recruitment, selection, orientation, performance evaluation, salary administration, and other human resource management functions.

Conceptualized and implemented organizational structure to accommodate growth of staff from 13 to 48.

Planned and implemented the conversion of more than 500,000 donor records to automated system thereby facilitating access to data and financial reporting.

ADDITIONAL EXPERIENCE

Sorbilite, Inc., Virginia Beach, VA
Manager of Operations, 1995-1997

United States Army
Director of Administration for International Assignees, Fort Monroe, VA
Director of Italian Programs, Rome, Italy
Instructor, Command and General Staff College, Ft. Leavenworth, KS
Military Attaché, Rome, Italy
Assistant Professor of International Relations, United States Military Academy, West Point, New York

EDUCATION
Master of Arts in Management, Webster University
Master of Arts in Political Science, Tulane University
Laurea in Political Science [Olmsted Scholar], University of Florence, Italy
Bachelor of Science, United States Military Academy, West Point