Meeting of the Committee on Institutional Advancement

Thursday, March 8, 2012
1:00 p.m.
Thomas Hall
3d Floor Conference Room (318)
ADVANCEMENT REPORT

- Tab 11, Board book
- AY 2011-2012 goals
- Fundraising update – through February 29, 2012
- Campaign update
- Centennial celebrations – Founder’s Day Weekend
- Organizational changes
- Alumni College
AY 2011-2012 GOALS

• To support the overarching strategies of Loyola 2012
• To initiate the Leadership Phase of the Faith in the Future campaign
• To continue to improve the return on the resources invested into OIA
• To execute the kick-off celebratory activities for Loyola’s centennial celebrations
AY 2011-2012 GOALS – CONT’D

• To do our part to ensure a successful 5-year SACs accreditation review
• To engage Loyola’s community neighbors to ensure that Phase II of the master plan is implemented as smoothly as possible
• To initiate an analysis of the concept of “Culture of Philanthropy”
FUNDRAISING UPDATE – THROUGH FEBRUARY 29, 2012

• Unrestricted income for current operations through 02/29/2012- $478,710 or 48% of $1M goal

• Total gift income through 02/29/12 - $2,859,262

• New gifts and pledges through 02/29/2012 - $3.13M, or 16.5% of $20M goal

• Budget relief dollars - $900,779 or 107% of $845K goal

• Gifts – unrestricted and campaign - $1.38M, or 75% of $1.845M goal
FAITH IN THE FUTURE
THE CAMPAIGN FOR LOYOLA UNIVERSITY NEW ORLEANS

LOYOLA UNIVERSITY NEW ORLEANS
CAMPAIGN UPDATE

- $15.5M committed as of February 29, 2012
- BOT Gift Committee co-chairs recruited
- Honorary co-chairs recruited
- 4 members of the “lay” board of trustees are in gift discussions; some members have already made specific gifts to the campaign
- Leadership/Principal [≥$500K] gift discussions underway with three individuals
- Campaign messages and priorities - handout
- Draft campaign reports - handout
- Next steps
CAMPAIGN UPDATE – “TENTATIVE”
CAMPAIGN MESSAGES
(Handout)

- Fostering academic excellence
- Strengthening our Catholic Jesuit identity
- Extending opportunity to talented students
- Enriching the community in New Orleans and beyond
- Connecting to the world
- Transforming our campus environment
- Enhancing the Loyola experience in every dimension
- Addressing critical local and global issues
- Improving our culture of philanthropy

Comments
CAMPAIGN UPDATE – “WORKING”
CAMPAIGN PRIORITIES
(Handout)

• Scholarships
• Build on innovative programs and bolster the academic enterprise
• Jesuit values and identity
• Campus and community
• Unrestricted
CAMPAIGN UPDATE – DRAFT CAMPAIGN REPORTS (Handouts)

• Draft quantitative report(s)

• Draft narrative report

❖ Your feedback/comments will be appreciated
## Campaign Report - Dashboard

### Faith In The Future

**Gifts Received as of February 29, 2012**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Goal</th>
<th>Overall Amount Received</th>
<th>% of Goal Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Affairs</td>
<td>$40,000,000</td>
<td>$4,993,238</td>
<td>12.48%</td>
</tr>
<tr>
<td>Center for Spiritual Capital</td>
<td>$3,000,000</td>
<td>7198</td>
<td>12.12%</td>
</tr>
<tr>
<td>HUNI</td>
<td>$4,500,000</td>
<td>$982,207</td>
<td>4.91%</td>
</tr>
<tr>
<td>Health Law Center</td>
<td>$3,000,000</td>
<td>137,198</td>
<td>0.69%</td>
</tr>
<tr>
<td>Roussel Hall Renovation</td>
<td>$15,000,000</td>
<td>8,204,176</td>
<td>82.04%</td>
</tr>
<tr>
<td>Digital Laboratory</td>
<td>$2,500,000</td>
<td>1,191,064</td>
<td>11.91%</td>
</tr>
<tr>
<td>Honors Program</td>
<td>$1,200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library</td>
<td>$2,500,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assorted 2d Priorities</td>
<td>$8,300,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Overall Goal** $100,000,000  
**% of Goal Achieved** 15.51%

### Major Gift Activities FY 2012 Thru February 29, 2012

<table>
<thead>
<tr>
<th>Gift Type</th>
<th>No. of Likely Donors Required</th>
<th>No. of Likely Donors Identified</th>
<th>No. of Likely Donors Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Gifts ($5 million - $10 million)</td>
<td>12</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Leadership Gifts ($500,000-$499,999)</td>
<td>140</td>
<td>55</td>
<td>85</td>
</tr>
<tr>
<td>Major Gifts ($50,000-$499,999)</td>
<td>1200</td>
<td>375</td>
<td>825</td>
</tr>
<tr>
<td>Special Gifts ($15,000-$49,999)</td>
<td>1800</td>
<td>683</td>
<td>1117</td>
</tr>
<tr>
<td>Total</td>
<td>3752</td>
<td>1120</td>
<td>2032</td>
</tr>
</tbody>
</table>

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**LOYOLA UNIVERSITY NEW ORLEANS**
Campaign Report - Priorities

Faith in the Future Campaign Gifts by Priority
FY 2012 to February 29, 2012

- Campaign Total: $15,507,883
- Unrestricted: $1,191,000
- Scholarships: $982,207
- Student Affairs: $137,198
- Mission & Ministry: $8,204,176
- Academic Affairs: $4,993,238

Goal: $100,000,000
Actual: $1,191,000

Campaign Report - Constituencies

Giving by Constituency Type - FY'12 to February 29, 2012

- Alumni: $3,013,862
- Corporations: $1,473,938
- Foundations: $1,867,111
- Organizations: $51,369
- Friends: $9,101,602
- Total: $15,507,883
CENTENNIAL KICK OFF WEEK/ALUMNI WEEKEND/FOUNDER’S DAY CELEBRATION

• Tuesday, April 10, 2012
  – 7 pm: Centennial Lecture Series
    *Leading the Way: Loyola and the Desegregation of New Orleans*

• Thursday, April 12, 2012
  – 7 pm: Centennial Lecture Series
    *Jesuit Education in Latin America: A Social Commitment Perspective*

• Friday, April 13, 2012
  – 5 pm: Centennial kick-off/Alumni Welcome Reception
  – 7 pm: Alumni Class Reunion Dinners
CENTENNIAL
KICK OFF WEEK/ALUMNI WEEKEND/
FOUNDER’S DAY CELEBRATION

• Saturday, April 14 Founder’s Day Events
  – 1-3 pm: Full campus tours
  – 2 pm: Book signing and lecture by Dr. Bernie Cook
  – 3 pm: Loyola Concert Band [Premiering COL Bourgeois Centennial Fanfare]
  – 5 pm: 100th Anniversary Celebratory Mass
  – Following Mass: Picnic dinner celebration and fireworks

• Sunday, April 15, 2012
  – 10:30 am: Alumni Jazz brunch
  – 7:00 pm: St. Louis Cathedral Spring Concert
2012 Alumni College: 

*Experience Loyola Again*

- June 22-24, 2012
- College Program to be mailed in two weeks - handout
ORGANIZATIONAL CHANGES WITHIN THE OIA

• Annual Giving team now reports to AVP for Development

• Director of Research reports to VP, OIA
NEW BUSINESS

- Loyola University New Orleans proposed naming policy
  - Purpose
  - Specific comments
    - Establishes a “Named Gifts Program Committee”
    - Prior approval required
    - Establishes minimum funding guidelines for naming
  - Your “feedback” would be appreciated

- Next step: pending IA Committee approval will be presented to full board at May 2012 board meeting for its approval.
OLD BUSINESS

• Board of Trustee recruitment and board giving expectations – results of survey of other AJCU members

• Changes to BOR matching program for endowed chairs and professorships

• Comparison of 2010-11 Loyola gifts to national/ AJCU/ and aspirant groups - handout
BOARD OF TRUSTEE RECRUITMENT AND GIVING EXPECTATIONS

• Requests for information submitted to the 27 members of the AJCU

• 15 responses received

• Questions
  – How is the subject of a trustee’s personal giving raised during the recruitment discussions with a potential trustee?
  – How was the standard for the expectation of trustee giving established?
– Does the institution have established, formal policies on board giving?
– Is there a minimum annual giving expectation for a board member? If so, how was it established?
– If your institution is in a campaign, is there specific “collective” giving goal for the board?
– Who raises the specific issue of BOT philanthropic support during the recruitment process – the president, the chair of the board, . . . ?

• Responses
COMPARISON OF 2010-11 LOYOLA GIFTS TO NATIONAL/AJCU/AND ASPIRANT GROUPS

<table>
<thead>
<tr>
<th>Percentile Comparison to Significant Groups</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>75th Percentile</td>
<td>50th Percentile</td>
</tr>
<tr>
<td><strong>Loyola New Orleans</strong></td>
<td><strong>Master (Private)</strong></td>
</tr>
<tr>
<td>Overall Giving/Grand Total</td>
<td>$6,955,327.00</td>
</tr>
<tr>
<td>Total Unrestricted Giving</td>
<td>$755,022.00</td>
</tr>
<tr>
<td>Alumni Total Giving</td>
<td>$2,725,295.00</td>
</tr>
<tr>
<td>Alumni Participation Rate</td>
<td>7.40%</td>
</tr>
</tbody>
</table>

| 75th Percentile | 50th Percentile | 25th Percentile |
| **Loyola New Orleans** | **AJCU Averages*** |  |
| Overall Giving/Grand Total | $6,955,327.00 | $16,226,335.00 | $9,330,541.00 | $6,931,486.00 |
| Total Unrestricted Giving | $755,022.00 | $3,290,862.00 | $1,355,464.00 | $1,034,053.00 |
| Alumni Total Giving | $2,725,295.00 | $4,451,567.00 | $3,412,979.00 | $1,732,373.00 |
| Alumni Participation Rate | 7.40% | 13.30% | 10.70% | 8.60% |

| 75th Percentile | 50th Percentile | 25th Percentile |
| **Loyola New Orleans** | **Aspirant Univ. Averages**** |  |
| Overall Giving/Grand Total | $6,955,327.00 | $32,929,654.00 | $23,537,016.50 | $18,510,937.50 |
| Total Unrestricted Giving | $755,022.00 | $2,997,060.50 | $1,847,098.50 | $1,418,183.50 |
| Alumni Total Giving | $2,725,295.00 | $9,677,196.00 | $8,095,693.50 | $4,009,395.00 |
| Alumni Participation Rate | 7.40% | 16.45% | 12.40% | 10.98% |
## COMPARISON OF 2010-11 LOYOLA GIFTS TO NATIONAL/AJCU/AND ASPIRANT GROUPS

### Master Institutions (Private) FY'11 Analysis

<table>
<thead>
<tr>
<th><em>Association of Jesuit Colleges &amp; Universities</em></th>
<th><strong>Aspirant University List</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Canisius College (Buffalo, NY)</td>
<td>University of Richmond (Richmond, VA)</td>
</tr>
<tr>
<td>Creighton University (Omaha, NE)</td>
<td>Rollins College (Winter Park, FL)</td>
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<tr>
<td>Fairfield University (Fairfield, CT)</td>
<td>Santa Clara University (Santa Clara, CA)</td>
</tr>
<tr>
<td>Gonzaga University (Spokane, WA)</td>
<td>Trinity University (San Antonio, TX)</td>
</tr>
<tr>
<td>John Carroll University (Cleveland, OH)</td>
<td>Villanova University (Villonova, PA)</td>
</tr>
<tr>
<td>Le Moyne College (Syracuse, NY)</td>
<td>Xavier University (Cincinnati, OH)</td>
</tr>
<tr>
<td>Loyola Marymount University (Los Angeles, CA)</td>
<td></td>
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<tr>
<td>Loyola University Maryland (Baltimore, MD)</td>
<td></td>
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<tr>
<td>Regis University (Denver, CO)</td>
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<tr>
<td>Rockhurst University (Kansas City, MO)</td>
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<tr>
<td>Saint Joseph's University (Philadelphia, PA)</td>
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<tr>
<td>Seattle University (Seattle, WA)</td>
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<tr>
<td>Spring Hill College (Mobile, AL)</td>
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<tr>
<td>University of Detroit Mercy (Detroit, MI)</td>
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<tr>
<td>University of Scranton (Scranton, PA)</td>
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<tr>
<td>Wheeling Jesuit University (Wheeling, WV)</td>
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<tr>
<td>Xavier University (Cincinnati, OH)</td>
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</tbody>
</table>
EXECUTIVE SESSION

ADJOURNMENT