

Assessment Cycle 2024 – 2025

University Advancement

Division or Department: Alumni and Development

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Northwestern State University Mission:

Northwestern State University is a responsive, Student-oriented institution that is committed to the creation, dissemination, and acquisition of knowledge through teaching, research, and service. The University maintains as its highest priority excellence in teaching in graduate and undergraduate programs. Northwestern State University prepares its students to become productive members of society and promotes economic development and improvements in the quality of life of the citizens in its region.

Note. University External Affairs is no longer a part of the University structure. However, the University Advancement Division remains with the same role, scope and mission.

University Advancement Mission:

The division of University Advancement includes the office of Alumni and Development, and related staff support for the NSU Foundation providing services to promote a positive image for the university, maintain relationships with and engage alumni, donors and government and civic leaders.

The Director of Alumni and Development and Executive Director of the NSU Foundation supervise the units within this division and work closely with the president and other vice presidents to implement university policies and procedures.

These units play an important role in showcasing the university and impacting enrollment, fundraising, alumni and community involvement, and other goals. The departments are directly involved in promoting a learning-centered environment, improving retention and graduation rates and maintaining a positive, student-oriented atmosphere.

Alumni and Development Mission:

The Alumni and Development unit goals are focused on fundraising, alumni relations, and institutional advancement. Personnel in Alumni and Development are responsible for directing programs and other functions related to fundraising, engaging alumni, and related activities. The Director of Alumni and Development manages the

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university's fundraising, identifying resources commensurate with university needs and priorities and solicits applications for corporate and foundation grants, estate planning and other financial planning, maintaining ties with key external constituents. The Director of Alumni and Development works closely with the Executive Director of the NSU Foundation to manage funds secured through university fundraising efforts. The framework of this unit is promulgated through promoting the advancement of academic excellence by developing a coalition among alumni, students, friends and the university community while supporting the university's traditions, values, and future.

Methodology: The assessment process includes:

- (1) Data from assessment tools (both direct – indirect, quantitative and qualitative) are collected and returned to the executive director;
- (2) The executive director will analyze the data to determine whether the applicable outcomes are met:
- (3) Results from the assessment will be discussed with the appropriate staff;
- (4) Individual meetings will be held with staff as required (show cause);
- (5) The executive director, in consultation with the staff and senior leadership, will determine propose changes to measurable outcomes, assessment tools for the next assessment period and, where needed, service changes.

Purpose:

To support and promote Northwestern State to alumni and community stakeholders, to raise funds to support the university, programming, scholarship and support for faculty and to increase engagement between the university, its alumni, and stakeholders.

University Advancement

Service Outcomes:

SO 1

Ensure private funding is available to augment state operating funds in order to support faculty, staff, students, programs and capital projects needed to advance the institutional mission. These resources are acquired in the forms of endowment contributions and annual recurring support as specified for restricted and unrestricted use.

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Measure 1.1

The NSU Foundation will increasingly secure private funding for the institution. The NSU Foundation keeps accounting records audited annually by a third-party firm. These records are reviewed on an ongoing basis to monitor progress toward annual increases in yield. The target is to increase private dollars secured by 15%.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. An increase of 41% was realized, the target was an increase of 15%. Based on the analysis of the 2023-24 results, changes were made in 2024-2025 to place additional focus on major gifts and restructure staff responsibilities related to fundraising.

Due to the absence of two major gifts secured in 2023-2024, in 2024-2025 the target was not met. A decrease of 19.2% was realized, the target was an increase of 15%.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 it is recommended that staff positions dedicated to fundraising be increased.

Measure 1.2

The NSU Foundation will track effectiveness through proven development strategies. The NSU Foundation keeps records in the *Agilon* constituent management system allowing for the monitoring of a prospect management cycle composed of the 4 professional phases of the development cycle: identification, cultivation, solicitation, and stewardship. The target is for each development officer to cycle 150 prospects annually.

Finding. The target was met.

Analysis: In 2023-2024, the target was met. Development officers cycled an average of 168 prospects annually. Based on the analysis of the 2023-2024 results, changes were made in 2024-2025 to assign additional prospects to each manager and max out the conversion rate.

Based on these changes, in 2024-2025 the target was not met. Development officers cycled an average of 162 prospects annually. The addition of prospects to each manager increased the number of total prospects contacted, but did not result in a higher conversion rate. Similar to last year's results, the change was slight however, signaling again the capacity of each fundraiser to move prospects through the cycle. As indicated last year, increasing prospects per manager is unlikely in the years to come as indicated by the lack of growth in conversion rates. Increasing the total number of prospects can be achieved through the addition of staff.

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Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 the NSU Foundation will continue the use of the tracking system and further analyze results. It is recommended that development officers continue to participate in monthly webinars and attend regional conferences focused on expanded use of the tracking system and prospect identification strategies. Requests for additional staff will be made to increase overall volume.

Measure 1.3

The NSU Foundation will maintain the number of current annual fund donors and increase the number of new annual fund donors. The NSU Foundation keeps records in the *Agilon* constituent management system on the number of individual donors giving on an annual basis. The target is to maintain the current number of individual donors and increase the number of new donors by 10% annually.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. The number of donors giving to the Columns Fund decreased from 428 to 495 (15.6%). Based on the analysis of the 2023-2024 results, changes were made in 2024-2025 including an increased focus on unrestricted giving during donor visits.

Due to a renewed focus on annual fund contributions and shifting fundraising position responsibilities accordingly, in 2024-2025 the target was not met. The total number of donors giving to the Columns Fund increased from 495 to 521 (5.3%). The target was 10%. Increased focus on unrestricted giving during donor visits was effective, however aggregate donor visits are limited to the number of staff members dedicated to fundraising.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 marketing efforts will continue to be analyzed to increase participation beyond donor visits including targeted mailers, social media promotion, email solicitation, and website development. It is recommended that additional fundraising positions be added as soon as possible.

Measure 1.4

The NSU Foundation will utilize a variety of giving vehicles including gifts of cash, transfers of stock, gifts in kind, matching gifts, and estate gifts to maximize avenues of securing diverse resources. The target is to ensure that constituents are informed annually of the range of giving options.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. The NSU Foundation secured \$1,000,000 in private contributions utilizing matching gift resources available through the NSUF,

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BORSF and LDH mental health support fund. Based on the analysis of the 2023-2024 results, in 2024-2025 continued focus was placed on estate giving and matching fund opportunities.

Based on these changes, in 2024-2025 the target was met. The NSU Foundation secured \$1,200,000 in private contributions utilizing matching gift resources available through the NSUF, BORSF and LDH mental health support fund.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 the NSU Foundation will continue to highlight a variety of giving vehicles through existing media including the website and *Alumni Columns* magazine. It is recommended that additional resources to pursue federal grant opportunities be considered as budgets are finalized for the 2025-2026 cycle.

Sources:

NSUF Accounting Records
NSUF Annual Audited Financials
Alumni Columns Magazine
northwetsernalumni.com
afpnet.org

SO 2

Enhance constituent participation from both alumni and non-alumni supporters in the areas of membership, attendance, affinity efforts, and volunteer endeavors.

Measure 2.1

The NSU Alumni Association will increase membership to support outreach and awareness activities. The target for membership will be a 10% increase.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. As of June 30, 2024 there were 1,321 active members, an increase of 10.3% from 1,197 secured during 2022-2023. Based on the analysis of the 2023-2024 results, in 2024-2025 staff reviewed lapsed membership activity and benefits.

Based on these changes, in 2024-2025 the target was not met. As of June 30, 2025 there were 809 active members, an decrease of 38.8% from 1,321 secured during 2023-2024.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 staff will focus on renewing memberships.

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Measure 2.2

The NSU Alumni Association will increase attendance at alumni socials and chapter gatherings. The NSU Alumni Association maintains records on the number of individuals participating in alumni chapter events and socials. The target for participation will be a 10% increase in attendance.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. Chapter events averaged 65 at all area alumni events, an increase of 12% from 58 in 2022-2023.

In 2024-2025 the target was not met. Chapter events averaged 48 at all area alumni events, a decrease of 26.2% from 65 in 2023-2024.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 chapter presidents and area volunteers will be engaged to promote events and increase growth. The NSU Alumni Association events and outreach committee will continue to look at ways to promote and grow chapter events.

Measure 2.3

The NSU Alumni Association will increase awareness of fundraising and outreach endeavors through social media platforms with a focus on increasing institutional affinity. The NSU Alumni Association maintains social media outlets including *Facebook*, *Twitter*, and *Instagram*. The target is to increase exposure by 10% annually for both *Facebook* “likes” and *Twitter* “followers” and establish an *Instagram* account.

Findings: The target was not met.

Analysis: In 2023-2024 the target was not met. Social media exposure increased from 9,813 to 10,027 (2.2%). Based on the analysis of these results, in 2024-25 additional strategies were employed to increase participation including paid advertisements and online drawings and giveaways.

Based on these changes, in 2024-2025 the target was not met. Social media exposure increased from 10,027 to 10,123 (1%), the target was 10%. Implementation of paid advertisement and incentive-based participation strategies assisted in growth, but not enough to reach the target.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 is recommended that staff responsibilities related to social media exposure be enhanced and opportunities for paid advertisement or sponsored posts on these platforms continue to be utilized to increase engagement.

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Measure 2.4

The NSU Alumni Association will seek support from alumni and non-alumni supporters for volunteer efforts focused on providing opportunities for graduating seniors and alumni seeking employment. The NSU Alumni Association maintains the demoNSUnite.net platform as a medium to achieve this goal. The target is to increase participation by 10%.

Finding. The new platform has been launched.

Analysis. In 2023-2024 the target was met. The new platform went live in October of 2023 and had 36,996 registered users as of June 30, 2024.

Based on these changes, in 2024-2025, the target was not met. Number of registered users increased from 36,996 to 38,784, an increase of 4.8%. The target was 10%.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 the NSU Alumni Association staff will market the benefits of the site to the alumni base.

Measure 2.5

The NSU Alumni Association will increase institutional affinity. The NSU Alumni Association surveys alumni annually using the *Survey Monkey* tool to collect feedback related to overall sentiments towards the institution. The target is to receive 80% positive feedback.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. Survey results revealed over 90% positive feedback exceeding the 80% target. Based on the analysis of these results, in 2024-2025 surveys were continued, and additional items were added to further gauge affinity.

Based on these changes, in 2024-2025 the target was met. Survey results revealed over 92% positive feedback exceeding the 80% target.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 the NSU Alumni Association will continue the administration of post-event surveys and evaluate additional means of measuring affinity.

Sources:

Agilon Constituent Records

Eventbrite Event Management Records

Survey Monkey Survey Results

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SO 3

The Office of University Advancement will maintain relationships with government agencies, elected officials and private business to ensure accomplished trends and needs based counterparts are current and effectively advanced.

Measure 3.1

The Office of University Advancement, in consultation with the University of Louisiana System, University President and Vice President of External Affairs, will maintain open lines of communication with elected officials concerning matters of public policy related to the advancement of higher education and the specific regional benefits and needs of the institution. Success is measured through increased communication and dialogue with the institution's regional delegation and corresponding support.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. Final funding in the amount of \$14.2M in P1 funding was allocated to complete construction of Alost Hall. \$13.5M in P5 funding was allocated for planning and renovations to Warrington Hall. Based on the analysis of the 2023-2024 results, changes were made in 2024-2025 to increase advocacy efforts and frequency of communicating institutional priorities to regional legislators.

Based on these changes, in 2024-2025 the target was met. Funding in the amount of \$588k in P1 and \$18M in P5 was allocated to begin construction planning for the NSU-LSMSA Innovation Center. \$575k in P1 and \$13.5M in P5 funding was allocated to begin construction planning for Warrington Hall.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 direct personal communications with state officials, staff, and legislators concerning key issues will continue including the hosting of meetings with the regional delegation at NSU's campus to discuss institutional priorities, illustrate the importance of the state's investment in higher education, and showcase NSU's impact on the region.

Measure 3.2

The Office of University Advancement will seek out and secure public-private partnerships to efficiently satisfy the needs of the institution as an alternative to direct support. These symbiotic relationships will be evaluated on individual specific merit. The target is to increase the number of endeavors on an annual basis.

Finding. The target was met.

Analysis. In 2023-2024 the target was met. Public private partnerships have increased

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from 85 to 89 with several partners executing multiple contracts bringing the total number of agreements to 167.

Based on these changes, in 2024-2025 the target was met. Public private partnerships have increased from 89 to 92 with several partners executing multiple contracts bringing the total number of agreements to 170.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 it is recommended that existing public-private partnerships continue to be reviewed annually to ensure long term viability and new partners be identified.

Sources:

Agilon Constituent Records

ticksheet.ulsystem.edu

demonsunite.net

SO 4

Ensure that dollars raised are invested into the institution in an efficient and effective manner.

Measure 4.1

The Office of University Advancement will communicate regularly with the offices of University Recruiting, Financial Aid, Scholarships, and the various colleges to review availability of funding and determine calculated allocations of use. Success will be determined by ensuring that available scholarship dollars are used in conjunction with funds provided by the state to recruit and retain students in a cost-effective manner.

Finding. The target was met.

Analysis: In 2023-2024 the target was met. The Office of University Advancement met with offices across campus to determine need and allocated funds accordingly. Based on the analysis of the 2023-2024 results, changes were made in 2024-2025 to continue to adjust allocations based on need.

Based on these changes, in 2024-2025 the target was met. For the fiscal year ending June 30, 2025, the NSU Foundation provided \$5,521,561 in institutional support including \$3,211,110 for student scholarships, \$652,934 for faculty/staff support, \$719,029 for capital improvements, \$105,069 for recruiting/marketing initiatives, \$702,250 for operating expenses and \$131,169 for alumni/community outreach events.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 the Office of University Advancement will continue to communicate regularly with the offices of University Recruiting, Financial Aid, Scholarships, and the

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various colleges to review availability of funding and determine allocations of use.

Measure 4.2

The NSU Foundation/Office of University Advancement will compile and distribute an annual report to all stakeholders illustrating the impact of disbursements and highlighting donor specific fund performance. The target is to compile and submit the report annually.

Finding. The target was met.

Analysis: In 2023-2024 the target was met. The individual endowment performance reports proved effective in encouraging others to get involved and increase giving levels. Based on the analysis of the 2023-2024 results, changes were made in 2024-25 continue individual endowment performance reports outlining performance activity and related expenditures.

Based on these changes, in 2024-2025 the target was met. The individual endowment performance reports proved effective in encouraging others to get involved and increase giving levels.

Action-Decision or Recommendation. Based on the analysis of the results in 2024-2025, in 2025-2026 staff will continue to compile the annual report and include individual endowment performance reports.

Sources:

Office of University Advancement Meeting Interagency Meeting Minutes
NSUF Annual Report

Comprehensive Summary of Key Evidence of Improvements Based on Analysis of Results. The following reflects all the changes implemented to drive the continuous process of seeking improvement in AC 2024-2025. These changes are based on the knowledge gained through analyzing the AC 2023-2024 results and lessons learned.

Assigned additional prospects to each fundraising manager resulting in increased number of prospects cycled annually.

Increased endowment growth through realization of matching gifts, donor education about investment performance and securing permanently restricted contributions.

Continued focus on estate giving benefits and matching fund opportunities resulting in increased variety of giving options realized.

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Increased staff responsibilities related to marketing and social media resulting in enhanced online exposure.

Administered post-event surveys and measured a variety of affinity and capacity indicators.

Marketed new online engagement platform and increased staff responsibilities related to volunteer efforts resulting in increased participation.

Increased advocacy efforts by engaging with state level officials and staff in addition to legislators resulting in budget stabilization, funding for capital projects, and policy development.

Increased focus on revenue generating projects resulting in acquisition of contiguous real estate and private funding of staff positions.

Plan of Action Moving Forward.

Hire additional staff dedicated to fundraising.

Continue use of the constituent tracking system and further analyze results.

Continue the use of social media platforms with a focus on increasing exposure. Analyze opportunities for paid advertisement or sponsored posts on these platforms to increase engagement.

Continue to utilize data capture and other strategies employed by third party consultant to increase Alumni Association membership.

Continue advocacy efforts when the legislature is not in session and work closely with legislative and state governing board staff.

Continue exploring public private partnership opportunities to ensure long term viability and the identification of new partners.

Continue work NSU Foundation ad hoc committee to explore additional real estate investments and revenue sharing opportunities with private partners.

Continue to communicate regularly with the offices of University Recruiting, Financial Aid, Scholarships, and the various colleges to review availability of funding and determine allocations of use.

Continue to compile annual endowment activity reports and publish giving statistics to encourage participation.