

# Assessment Cycle 2020 – 2021

## External Affairs

Division or Department: University Advancement

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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.

### **External Affairs Mission:**

External Affairs is a diverse segment of the university that includes Athletics, Alumni, and Development, Wellness, Recreation and Activities Center (WRAC); The Robert Wilson Recreation Complex; NSU Press/Publications, Marketing and Branding, NSU TV, University Printing, the News Bureau, Photo Services and Sports Information. These offices provide services to promote a positive image for the university, maintain relationships with the media and engage alumni, prospective students, donors and government and civic leaders.

The Vice President for External Affairs supervises the units within his division, coordinates governmental relations for the University and directs numerous endeavors related to public relations, community service, promotions, marketing and institutional advancement. He works closely with the president and other vice presidents to implement university policies and procedures.

Each unit of External Affairs works the University community-at-large to recognize students and faculty, create awareness of news, programs, and services on campus and engage the community outside NSU by bringing them to campus for athletic, academic and cultural events and to utilize the WRAC and the Rec Complex. These units play an important role in showcasing the university and impacting enrollment, fundraising, alumni and community involvement, and other goals. The Division is directly involved in promoting a learning-centered environment, improving retention and graduation rates and maintaining a positive, student-oriented atmosphere.

### **University Advancement Mission:**

University Advancement includes Alumni and Development, the arms of the institution that reach out to alumni and community partners. The units' main goals are focused on fundraising, alumni relations, and institutional advancement. Personnel in

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University Advancement are responsible for directing programs and other functions related to fundraising, engaging alumni, and related activities. The Assistant Vice President of External Affairs for Advancement also serves as the executive director of the NSU Foundation and NSU Alumni Association serving as a liaison between the non-profit entity and the university. The AVPEAA manages the 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 framework of this unit is promulgated through promoting the advancement of academic excellence by developing 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 not met.

**Analysis.** In 2019-2020 the target was not met. A decrease of 10% was realized, the target was an increase of 15%. Based on the analysis of the 2019-20 results, changes were made in 2020-2021 to place focus on major gifts and restructure staff responsibilities related to fundraising.

Due to the cancellation of revenue generating events and staff turnover, in 2020-2021 the target was not met. A decrease of 2% was realized, the target was an increase of 15%.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 revenue generating events will be scheduled and it is recommended that vacant staff positions be filled as soon as possible.

### 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 50 prospects annually.

**Finding.** The target was met.

**Analysis:** In 2019-2020 the target was met. Development officers cycled an average of 156 prospects annually. Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 to assign additional prospects to each manager and increase the average conversion target to 150.

Based on these changes, in 2020-2021 the target was met. Development officers cycled an average of 158 prospects annually. The addition of prospects to each manager increased the number of total prospects contacted resulting in a higher conversion rate. The increase was slight however, signaling the capacity of each fundraiser to move prospects through the cycle. Increasing prospects per manager is unlikely in the years to come as indicated by the slowed 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 2020-2021, in 2021-2022 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 2019-2020 the target was not met. The number of donors giving to the Columns Fund decreased from 416 to 369 (8.8%). Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 including an increased focus on unrestricted giving during donor visits.

Due to increased focus on unrestricted giving during donor visits, in 2020-2021 the target was met. The total number of donors giving to the Columns Fund increased from 369 to 444 (21%). 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 2020-2021, in 2021-2022 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 vacant positions be filled 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 2019-2020 the target was met. 2 new estate gifts were established and over \$640,000.00 in indirect contributions was realized. The Board of Regents cleared a

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backlog consisting of 13 First Generation Endowed Scholarship requests and submitted \$520,000.00 in matching funds to be combined with \$780,000 in existing funds creating a \$1.3 M endowment increase. Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 including a continued focus on estate giving and matching funds.

Based on these changes, in 2020-2021 the target was met. The University of Louisiana System system offered a limited opportunity for each institution to receive \$80,000 in matching funds and both were paired with private contributions. 3 new estate gifts were established, IRA rollover opportunities were realized and a new charitable remainder trust was established. Donor testimonials were highly successful in encouraging other prospects to utilize a range of giving options. Print appeals have proven successful as well as email informationals.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 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 gifts of life insurance should be considered as an additional offering.

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 2019-2020 the target was met. As of June 30, 2020 there were 692 active members, an increase of 10% from the 632 baseline. The Associate Director of Alumni Affairs worked closely with the Associate Director of Marketing for University Advancement to review membership benefits, make adjustments and prepare for the 2021 campaign. A third party consultant was contracted to assist with membership appeals through an organized data campaign.

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Based on these changes, in 2020-2021 the target was met. As of June 30, 2021 there were 977 active members, an increase of 42% from 692 secured during 2019-2020.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 staff will utilize strategies employed by the third party consultant including appended contact information derived from the PCI data campaign.

### 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 not met.

**Analysis.** In 2019-2020 the target was not met. Due to COVID-19, all alumni chapter events were cancelled.

Due to COVID-19 and continued event cancellations, in 2020-2021 the target was not met.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 events are being rescheduled as COVID-19 restrictions are lifted.

### 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 2019-2020 the target was met. Social media exposure increased from 8,173 to 8,995 (10%). The position of Assistant Director of Marketing for University Advancement was filled and dedicated to outreach including social media growth.

In 2020-2021 the target was not met. Although social media exposure increased from 8,995 to 9,463 (6%), the target was 10%. Increased staff responsibilities dedicated to outreach assisted in growth, however additional strategies will need to be employed to meet the target.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 it is recommended that staff responsibilities related to social media

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exposure be enhanced and opportunities for paid advertisement or sponsored posts on these platforms be utilized to increase engagement.

### 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 target was met.

**Analysis.** In 2019-2020 the target was met. Participation increased from 1,602 to 1,854 (16%). Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 to extend the contractual agreement for demoNSUnite.net and increase staff responsibilities related to volunteer efforts.

Based on these changes, in 2020-2021 the target was met. Participation increased from 1,854 to 2,040 (10%). Increased staff responsibilities related to engagement enhanced volunteer efforts. User testimonials were effective in increasing participation.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 the NSU Alumni Association staff will continue, through the use of social media and online communications, to promote the demoNSUnite.net platform. While the response rate has continued to increase, survey results show that the platform would benefit from additional efficiencies. Market competition has driven the price down and an RFP was conducted to consider options. A new service provider was contracted for FY 21-22. Platform costs will decrease by 25% while service capability will increase substantially. Staff members are working with the new provider to address issues of efficiency and a relaunch is scheduled for fall 2021.

### Measure 2.5

The NSU Alumni Association will increase engagement of non-traditional constituents by focusing on student participation and strategies to appeal to graduates of online programs. The target is to re-establish the NSU Student Alumni Association and send cost effective branded materials to online graduates.

**Finding.** The target was met.

**Analysis:** In 2019-2020 the target was met. The NSU Student Alumni Association increased membership from 54 to 65 (21%). Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 to increase staff responsibilities dedicated to growing the organization.

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Based on these changes, in 2020-2021 the target was met. Membership increased from 65 to 78 and a part time staff member is working with the organization to drive membership.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 it is recommended that staff responsibilities dedicated to the organization be increased.

### Measure 2.6

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 2019-2020 the target was met. Survey results revealed over 90% positive feedback exceeding the 80% target. Based on the analysis of the 2019-2020 results, in 2020-2021 the NSU Alumni Association planned to continue the administration of post event surveys.

Due to COVID related event cancellations, in 2020-2021 data was not collected.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 the NSU Alumni Association will resume the administration of post-event surveys and measure affinity.

Sources:

*Agilon* Constituent Records

*Eventbrite* Event Management Records

*Survey Monkey* Survey Results

### 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



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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 2019-2020 the target was met. Funding for the Kyser Hall Replacement project increased from \$22.7M to \$37.4M. Previous P2 allocations were moved to P1 and were increased by \$1.6M totaling \$2.225M available for planning and construction in 2020-2021. The project was been placed on the selection board agenda for the July 15 meeting. Funding for demolition projects is being held in escrow and demolition have been scheduled in accordance with the completion of the LSMA dormitory.

Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 to increase efforts further by engaging with state level officials and staff in addition to regularly communicating with legislators.

Based on these changes, in 2020-2021 the target was met. Louisiana's 2020 Regular Legislative Session concluded with the best budget for higher education in 13 years including full funding for TOPS and faculty pay raises. \$2.1M in P2 funding was allocated to continue Kyser Hall Replacement planning; \$500,000 was allocated to replace the synthetic turf system at Turpin Stadium; and \$11.2M in HEERF funds were distributed to the institution.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 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 2019-2020 the target was met. Public private partnerships increased to 62. These partnerships range from funding of faculty/staff positions to articulation and transfer agreements. The NSU Foundation will established a committee to explore additional real estate investments and revenue sharing opportunities with private partners. Based on the analysis of the 2019-2020 results, changes were made in 2020-2021 to increase focus on revenue generating projects and the addition of new

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articulation and transfer agreements.

Based on these changes, in 2020-2021 the target was met. Public private partnerships have increased from 62 to 67. Several partners have executed multiple contracts bringing the total number of agreements to 149. Substantial growth is attributed to the addition of articulation agreements with current partners and new institutions.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 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 2019-2020 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 2019-2020 results, changes were made in 2020-2021 to adjust allocations based on need.

Based on these changes, in 2020-2021 the target was met. For the fiscal year ending June 30, 2021, the NSU Foundation provided \$3,876,578 in institutional support including \$2,329,705 for student scholarships, \$541,693 for faculty/staff support, \$293,726 for capital improvements, \$24,328 for recruiting/marketing initiatives, \$582,279 for operating expenses and \$104,847 for alumni/community outreach events.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 the Office of University Advancement will continue to 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

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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 2019-2020 the target was met. A report detailing endowment activity was sent to donors. Based on the analysis of the 2019-2020 results, changes were made in 2020-21 to add a list of donors at various levels to be published along with the report to encourage participation.

Based on these changes, in 2020-2010 the target was met. The list of donors proved effective in encouraging others to get involved and increase giving levels.

**Action-Decision or Recommendation.** Based on the analysis of the results in 2020-2021, in 2021-2022 staff will continue to compile the annual report. It is recommended that individual endowment performance reports be included outlining performance activity and related expenditures.

Sources:

Office of University Advancement Meeting Interagency Meeting Minutes  
NSUF Annual Report

### Comprehensive Summary of Key Evidence of Improvements Based on Analysis of Results.

Increased Columns Fund membership by highlighting the impact of unrestricted giving and dedicating resources to marketing.

Increased Alumni Association membership through the use of third party consultant and restructured staff responsibilities focused on renewals.

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.

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

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Promoted demoNSUnite.net 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.**

Resume planning for revenue generating events and fill staff positions as soon as possible.

Continue use of the constituent tracking system and further analyze results; request additional staff to increase overall volume.

Provide additional resources for marketing efforts to increase social media promotion, email solicitation, and website development.

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.

Resume administration of post-event surveys and measure a variety of affinity and capacity indicators.

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.