

**DELTA STATE UNIVERSITY: NON-ACADEMIC ANNUAL REPORT**  
**Academic Year 2005-06**

**I. Unit Title: Delta State University Alumni-Foundation**

**Unit Administrator: D. Keith Fulcher, Executive Director**

**II. Educational Program Learning Outcome Assessment Plan**

These are Learner Outcomes identified for the **current** year. Contents of the table should be very brief. Footnotes may be included for items needing explanation or documentation. Not all units have direct student impact. Those that do should have clear learner outcomes developed. Those with no student contact may indicate that this section is not applicable.

<p><b>Learning Outcome</b> <i>What should a graduate in this major know, value, or be able to do at graduation and beyond?</i></p>	<p><b>Data Collection and Analysis</b> <i>What assessment tools and/or methods will you use to determine achievement of the learning outcome? Describe how the data from these tools and/or methods will be collected. Explain the procedure to analyze the data.</i></p>	<p><b>Results of Evaluation</b> <i>What were the findings of the analysis? List any specific recommendations.</i></p>	<p><b>Use of Evaluation Results</b> <i>What changes in curriculum, courses, or procedures were made as a result of the program learning outcome assessment process?</i></p>
<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

### **III. Division/Department Goals for the Current Year**

#### **A. Goal # 1. Increase the number of privately funded scholarships and award amounts.**

##### **1. Institutional Goal which was supported by this goal: Strategic Plan Goal #2**

##### **2. Evaluation Procedure(s):**

On June 30, 2006 the Alumni-Foundation Office reviewed the number of new scholarship funds set up on the Banner system since June 30, 2005 and compared the dollar amount of scholarship reimbursements for FY05 and FY06.

##### **3. Actual Results of Evaluation:**

The Alumni-Foundation increased the number of privately funded scholarships available to students by 10% (287 students received a privately funded scholarship) and increased the dollar amount available from \$212,300 in 2004-05 to \$282,000 in 2005-06.

##### **4. Use of Evaluation Results:**

The Alumni-Foundation Office CFO is meeting regularly with representatives from the University's Admissions Office and Accounting Office to create a system for managing the privately funded scholarships to ensure that all scholarships are awarded in a timely fashion. The Alumni-Foundation Office goal is to provide the Admissions Office with information on available scholarships in a timeframe that allows for the most effective use of the funds during the peak recruiting season.

#### **B. Goal # 2 Align the programming and budget goals of the Alumni-Foundation with the Strategic Goals of the University.**

##### **1. Institutional Goal which was supported by this goal: Strategic Plan Goals 4 and 5**

##### **2. Evaluation Procedure(s):**

The Alumni Association hired a national consultant to review its mission, goals and objectives. The consultant offered recommendations on how the Association can best serve the University. The consultant interviewed key alumni leaders, university personnel, and office staff. The Foundation underwent a two-year long process of a self-study, which resulted in the analyzing all Foundation policies, processes and procedures. The self-study of the Foundation was conducted in collaboration

with representatives from the Alumni Association, the University, and Foundation Board of Directors. A national consultant will visit the Foundation in August 2006 to continue the review of policies, processes, and procedures.

### **3. Actual Results of Evaluation:**

Recommendations for the Alumni Association were reviewed by the Alumni Association's National Board of Directors and a report was presented in May 2005. The report stated that the Association overall is functioning at a high level based on the number of employees and amount of programming offered to alumni and programming and events that support the goals of the University. The report offered recommendations to the Association on increasing its role in the life of the University by offering activities and events that alumni are interested in. The Foundation's self-study identified the need to make asset allocation changes in the investment policy, update job descriptions for all director level positions, make better use of the Banner computer system to automate procedures that were being done manually, and improve the accounting operations of the Alumni-Foundation.

### **4. Use of Evaluation Results:**

As a result of the Foundation's self-study a new investment strategy has been employed and new money manager hired, job descriptions have been written for all director level positions, a formal evaluation process was implemented for the executive director position, the gift acknowledgement, pledge reminder, and bank reconciliation processes were automated, a CPA was hired for the CFO position, and financial reporting has been enhanced to acceptable accounting standards. The Alumni Association has increased its visibility among alumni and friends by hosting twenty-eight Alumni Chapter meetings throughout the nation. A new chapter was chartered in DeSoto County (Miss.), which is the fastest growing population in the state and one of the areas of greatest concentration of prospective students. The Association produces two issues of the Alumni magazine that is mailed to 21,000 alumni, donors, parents, and friends. The magazine is produced in collaboration with the University Relations Office and articles featured include academic programs, student, faculty, and staff accomplishments, and other topics that promote the goals of the University. The Association also produces a monthly e-newsletter that is sent to 9,000 alumni, parents, friends, and donors. The e-newsletter is also produced in collaboration with the University Relations Office who is responsible for the "highlight" section of the newsletter and regularly features University accomplishments that promote the University's strategic plan goals.

C. **Goal # 3** Increase the number of contacts with alumni, donors, parents, friends, faculty and staff by creating an e-newsletter.

**1. Institutional Goal which was supported by this goal: Strategic Plan Goals 4 and 5**

**2. Evaluation Procedure(s):**

A national consultant for alumni association's recommended that the Alumni Association increase the number of contacts to each alumni via e-newsletter, chapter meetings, and special events. Previously the University's 21,000 alumni received only two print magazines and no other print or electronic news from the Association.

### **3. Actual Results of the Evaluation**

An e-newsletter was piloted with the Alumni Board of Directors serving as the evaluators along with the University Relation's Office and a public relations firm. The monthly e-newsletter was first sent in February 2006 to 8,000 alumni, donors, friends, parents, faculty and staff with e-mail addresses captured on the Association's computer system.

### **4. Use of Evaluation Results**

The e-newsletter provides an opportunity for alumni to interact on a more regular basis with the Alumni Office. The number of e-mail correspondences received from alumni has increased 20% per month, which is an indication that the e-newsletter is an effective tool in communicating with alumni. Additionally, alumni are asking for more in-depth news and the Alumni Director added a section to the e-newsletter called "Extra Extra" that provides more information on upcoming events, alumni deaths, weddings, births, and links to chapter meetings throughout the region. The e-mail service provider also provides monthly reports on the "click open rate" for the e-newsletter, number of times it is forwarded, ranking of sections that are most read, and new subscribers signed up. This information allows the Alumni Office to continue to make improvements to the e-newsletter based on statistics.

**D. Goal # 4** Increase the number of contacts with alumni, donors, parents, friends, faculty and staff by increasing the number of alumni sponsored events.

#### **1. Institutional Goal which was supported by this goal: Strategic Plan Goals 4 and 5**

#### **2. Evaluation Procedure(s):**

A national consultant for alumni association's analyzed the Alumni Association's "Events Schedule" to assess the quality and quantity of alumni contacts offered.

#### **3. Actual Results of the Evaluation**

The Alumni Association based on the recommendation of the consultant partnered with the Athletic Department to co-sponsor for the first time five new alumni activities at athletic events in Jackson, Miss., Tupelo, Miss., Greenville, Miss., Conway, Ark, Memphis, Tenn., and Florence, Ala. The Association mailed invitations to alumni living in the areas where sporting events were being held and organized pre-game receptions for alumni, donors, parents of team members, and University personnel.

#### **4. Use of Evaluation Results**

The Alumni Association is now more proactive in taking advantage of athletic events as “naturally occurring” opportunities to invite graduates to attend alumni events. Collegiate sporting events offer the Association an opportunity to host alumni events in geographic regions that were not previously on the Association’s annual schedule for chapter meetings.

- E. Goal # 5** Create a job description and implement a formal evaluation process for the Executive Director of the Alumni-Foundation Office.

##### **1. Institutional Goal which was supported by this goal: Strategic Plan Goals 4 and 5**

##### **2. Evaluation Procedure(s):**

The Foundation Board of Directors’ Strategic Planning session was held in June 2004 and conducted by a national consultant. The session, held over a two-day period, addressed issues of job description, performance evaluation as related to the Executive Director position.

##### **3. Actual Results of the Evaluation**

Research prior to the session revealed that no officially approved job description existed for the position and no official evaluation instrument or procedure was evident.

##### **4. Use of Evaluation Results**

As a result of the Strategic Plan a formal job description was created in collaboration with the University’s Human Resource Office, Office of the President, and the Foundation’s Trusteeship Committee. The job description was approved by the October 2005 Foundation Board of Directors meeting. The next step was to implement an evaluation procedure for the Executive Director position. The Trusteeship Committee researched available instruments and agreed on “Assessment of the Chief Executive” instrument from BoardSource, a company that specializes in building effective nonprofit boards. A procedure for the evaluation was implemented in February with evaluations conducted by the select members of the Foundation Board Executive Committee members and President of the University.

- F. Goal # 6** Automate processes for greater efficiency.

##### **1. Institutional Goal which was supported by this goal: Strategic Plan Goals 4 and 5**

##### **2. Evaluation Procedure(s):**

The Alumni-Foundation hired a consultant to evaluate its processes and utilization of the Banner software system. The consultant met with the CFO, Executive Director, and all staff members reviewing job functions and processes.

### **3. Actual Results of the Evaluation**

The result of the evaluation was a recommendation for a 100% overhaul of the processes with emphasis on using the automated features of the Banner software system.

### **4. Use of Evaluation Results**

As a result of the evaluation the Alumni-Foundation automated such processes check writing, gift acknowledgement letter generation, checking account reconciliation, and alumni dues entry. Automation of these processes have completely transformed job functions within the office and provided for more efficient operations.

## **IV. Data and information for department:**

## **V. Personnel:**

### **Noteworthy activities and accomplishments:**

Missy Pearce, Director of Annual Giving, organized the calling of 14,000 alumni and friends resulting in \$158,000 in gifts and pledges, which is an increase from \$103,282 in previous year. Pearce has also instituted use of the Banner systems “matching gifts” module, which will enable the Foundation to better manage expected gifts.

Vicki Fioranelli, Director of Alumni Affairs, initiated the Alumni Association’s first-ever e-newsletter, *e-Statesman*, which is sent out monthly to 9,000 alumni and friends. Twenty-eight chapter meetings were held throughout the nation, including meetings in Nashville, Baton Rouge, and Memphis.

Keith Fulcher, Executive Director, assisted in the completion in October 2005 of the “Wings and Roots” Campaign that resulted in total gifts and pledges of \$37 million toward a goal of \$12 million.

Ann Giger, Administrative Assistant to the Executive Director, has received in-depth training on “prospect research” techniques and attended the Association of Professional Researchers for Advancement conference in Las Vegas and will attend the 19<sup>th</sup> Annual APRA International Conference in Orlando in August 2006.

Deborah Cox, CFO, and Dameon Shaw, assistant to the Director of Annual Giving, attended the SCT Summit (national convention) in Orlando, Florida, which provides information on the use of the Alumni-Foundation’s computer software.

The entire Foundation staff took part in an “Advancement Services” workshop in Jackson during November 2005 presented by John Taylor who is considered the most noted expert in the area of advancement services. Taylor wrote the CASE Management and Reporting Standards.

Webinars with the following topics have been offered to the Alumni-Foundation staff as part of continued training:

- “Strategic Planning for Alumni Relations: The Whys and Hows”
- “High Speed Success:The Best and Brightest Online Annual Giving Ideas”
- “Prospect Research for the Non-Research Professional”
- “Benchmarking: Auditing Your Annual Fund and Evaluations Results”
- “Optimizing Your Matching Gifts Program”

## **VI. Division/Department Goals for Coming Year**

### **A. Goal # 1**

Collaborate with the University on a communications plan that markets the University and enhances its academic image

#### **1. Institutional Goal(s) supported by this goal: Strategic Plan Goal #4**

#### **2. Expected Results:**

The expected result is that a marketing plan for the University will be created to address issues such as enhancing the academic image of the University, promoting the academic reputation of the faculty, and attracting and retaining high caliber students. The Foundation’s unrestricted budget will help support the University’s expenses associated with developing a marketing plan.

#### **3. Evaluation Procedure(s):**

The goal will be evaluate in terms of number of new students, retention of current students and faculty, and the overall perception as judged by surveys that alumni and friends have of the University. The Alumni-Foundation in collaboration with Institutional Research will conduct an alumni survey.

#### **4. Use of Evaluation Results:**

The results will be used to help determine how to best market the University using resources available to the Alumni-Foundation such as the alumni magazine, e-newsletter, and alumni chapter meetings.

**B. Goal # 2**

The Alumni-Foundation will initiate a comprehensive fund raising effort designed to meet the greatest needs of the University.

**1. Institutional Goal(s) supported by this goal: Strategic Plan Goals #1, 2, 3, 4, and 5**

**2. Expected Results:**

The expected result is that a comprehensive campaign will raise funds needed to meet the goals outlined in the University's Strategic Plan. A campaign will raise private funds to support academic programs, additional scholarships, faculty/staff salaries, athletics, performing arts, and many other areas of the University.

**3. Evaluation Procedure(s):**

A fund raising goal will be set in consultation with a national fund raising company. Evaluation of success will be based on number of dollars raised and number of donors. Success will be judged on number of new donors to the University and number of donors who contribute in consecutive years.

**4. Use of Evaluation Results:**

Results of the campaign will be used to plan for subsequent campaign efforts and will assist in determining areas of the University that donors are most attracted to supporting. It will also provide opportunity to market areas of the University that are in need of financial support from private gifts, but may be less familiar with donors.