Annual Report

The Delta State University Alumni Association
and
The Delta State University Foundation, Inc.

for the Calendar Year 1999
with Audit Reports for the 1998-99 Fiscal Year
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Delta State University Alumni-Foundation
ANNUAL REPORT
for the Calendar Year 1999
and Budget Request 2000-2001

I. Departmental Data and Information:

Unit Administrator: Dr. Don A. Skelton

Organizational Structure

The Alumni and Foundation programs at Delta State University are designed and exist to enhance the awareness of and support for the University among its diverse constituencies.

The Alumni and Foundation staff, with guidance from the Alumni Association Board of Directors and the Foundation Board of Directors, is responsible for coordinating the University’s outreach programs to alumni, the community, business and industry, the media and governmental and private agencies. The staff is committed to helping the University achieve its goals so that the academic quality and service to the region can be maintained and advanced.

State-assisted universities, in order to maintain academic quality and provide appropriate access in a time when traditional funding sources are diminishing, must look to partners in the private sector – to alumni, to friends, and to business and industry – for vital supplemental support. As these partnerships grow, mutual benefits increase. The University becomes stronger as it acquires additional resources to support such needs as scholarships, faculty chairs, faculty and staff development, specialized equipment, programs, and visiting artists and lecturers. The community benefits when it employs university graduates who have received a quality education provided by an outstanding faculty.

Both the DSU Alumni Association and the DSU Foundation are approved as non-profit organizations and subscribe to IRS requirements in line with maintaining IRS 501 (c) (3) tax exempt status. Therefore, both organizations are policy-driven and the Alumni-Foundation staff is responsible for knowledge of and adherence to approved policies that are designed to maintain and protect tax exempt status.
1999-2000
Delta State University Alumni Association
Board of Directors

President
Dr. Jim Avery
President-Elect
Charles Holmes
Vice President
Arthur Johnston
Secretary
Beth Embry
Treasurer
Billy Morehead
Past President
Mickey Robinson

District I
Andy Pearson
District II
Craig Verhage
District III
Daye Dearing
District IV
Chris Kelley
District V
Pat Chambless
At-Large Representative
Carole Pleasants

Presidential Appointees
Dr. Clayton Hollier
Windall Lancaster
Burns Strider

Constituent Groups

Accounting Alumni Association
John F. Fletcher
Art Alumni Association
Eddie Gong
Athletic Alumni Association
Mark Williams
Aviation Alumni Association
“Chip” Cooper
Black Alumni Association
Tammie Beamon
Family & Consumer Science Alumni
Valerie Outzs
Golden Circle Representative
Martha Miller
Music Alumni Association
Marshall Hughes
Nursing Alumni Association
Lisa Ellis
Student Alumni Association
Christen Aguzzi
Young Alumni Representative
John Aguzzi
Foundation Representative
Ned A. Mitchell
1999-2000
Delta State University Foundation
Officers and Board of Directors

Officers

Ned A. Mitchell .......... President
Peter Jernberg .......... Vice President
Larry O. Lewis .......... Secretary/Treasurer
Billy Nowell ....................... Past President

Directors

One-Year Term

| Louis Baioni                      | J. Stacy Davidson           |
| Elena Barham                     | Harry Flowers               |
| Curtis Buchanan                  | Gary Gainspoletti          |
| Jeff Ross Capwell                | Butch Scipper              |
| Terrell Cobb                     | Paul Watson                |
| Dr. Jim Avery, Alumni President  | John Quon, Faculty Rep.    |

Two-Year Term

| Paul Artman                      | Jon Levingston             |
| Reginald Barnes                  | Jimmy Newquist             |
| Dr. Travis Casanova              | Russell Stewart            |
| Paul Janoush                     | Jimmy Underwood            |
| Ed Kossman                       | Dr. Bennie Wright          |

Three-Year Term

| Bonnie Blackmon                  | Carolyn Manning          |
| Willis Frazer                    | Benny Pittman            |
| Caroline Gaines                  | Dr. Travis Richardson    |
| Benoit Holloway                  | Nan Sanders              |
| Roger Malkin                     | Robert E. Smith          |
ORGANIZATIONAL STRUCTURE FOR
THE ALUMNI AND FOUNDATION DEPARTMENT

The organizational structure for the Alumni and Foundation Programs at Delta State University is designed to facilitate the operations of both the University's Alumni Association and the DSU Foundation. An eight-person staff (shown below), under the supervision of the Executive Director, is responsible for the daily operations of both organizations.

Administrative Staff

In addition to specific responsibilities listed below, it is understood that members of the administrative staff make themselves available for organizing and participating in numerous university and/or department-sponsored events in the interest of "molding" alumni and friends into a positive support group.

Executive Director of Alumni and Foundation

The Executive Director is responsible for planning, execution and oversight of the University's alumni and foundation activities, services and fund raising. This position reports to the Vice President for University Advancement, the Delta State University Alumni Association Board of Directors, and the Delta State University Foundation Board of Directors.

Assistant Director of Alumni and Foundation

The Assistant Director has oversight responsibility in ensuring office accountability for the following: (a) maintaining fiscal records to ensure proper management of funds; (b) monitoring alumni record-keeping systems to ensure accurate and proper management of data; (c) coordinating continuing education and computer skills training for office personnel; (d) coordinating facility scheduling for all internal and external activities; and (e) monitoring inventory and supervising the acquisition and purchase of departmental supplies. This position reports to the Executive Director of Alumni and Foundation.

Coordinator of Alumni Activities

The Coordinator of Alumni Activities exercises responsibility in the following: (a) preparing and executing strategic plans and projects to facilitate identification and cultivation of alumni and friends of the university; (b) coordinating and managing volunteer participation in alumni efforts; (c) planning, setting, and monitoring the progress of established goals for alumni activities; and (d) assisting the staff with administrative details (summary reports, budget maintenance, etc.) of the Alumni Association Program. This position reports to the Executive Director of Alumni and Foundation.

Coordinator of Development Activities

The Coordinator of Development Activities exercises responsibility in the following: (a) preparing and executing strategic plans and projects to facilitate identification, cultivation, and solicitation of alumni, business, corporate, and foundation prospects for the University; (b) coordinating and managing volunteer participation in development efforts; (c) planning, setting, and monitoring the progress of established goals for development program activities; and (d) assisting the staff with administrative details (summary reports, budget maintenance, etc.) of the Foundation's Development Program. This position reports to the Executive Director of Alumni and Foundation.
Support Staff

In addition to the specific responsibilities listed below, it is understood that members of the support staff make themselves available to facilitate Alumni Association and Foundation Board of Directors’ meetings (3 per year for each) and assist with organization and presentation of multiple department-sponsored events (e.g. pig-pickin, homecoming, etc.) annually. It is also understood that all support staff personnel are called upon to assist and share in such organizational duties as answering telephones, processing mailouts, and providing direction and supervision to work-study students.

Alumni and Foundation Bookkeeper

In assisting and supporting the administrative staff, the Alumni and Foundation Bookkeeper exercises the following responsibilities: (a) monitors all financial records for the Alumni Association and the DSU Foundation; (b) initiates and adjust fiscal data through data entry; (c) handles sensitive records and reconciles alumni and foundation accounts on a regular basis; (d) monitors and coordinates pledge/dues reminder systems for organizations; and (e) makes daily deposits of incoming monies.

Senior Secretary - Foundation

In assisting and supporting the administrative staff, the Secretary-Foundation performs a variety of administrative tasks including: (a) reception and distribution of all incoming mail and monies; (b) maintenance of donor files and adjustment of alumni and donor records through data entry; (c) preparation and return of proper acknowledgement correspondence to donors; (d) facilitating all business activity and correspondence for the Executive Director’s office; and (e) monitoring of the Foundation facilities use card program.

Senior Secretary - Alumni

In assisting and supporting the administrative staff, the Secretary-Alumni performs a variety of administrative tasks including: (a) maintaining alumni records and coordinating database files of approximately 20,000 alumni and friends; (b) processing alumni dues acknowledgements; (c) preparing numerous and diverse university and organizational reports; (d) assembling and researching alumni information for the alumni magazine and upon request; and (e) assisting with the coordination of all alumni activities.

Senior Secretary - Development

In assisting and supporting the administrative staff, the Secretary-Development performs a variety of administrative tasks including: (a) tracking contributions and pledge activity directed to university fund raising activities (e.g. annual fund, planned giving, performing arts, etc.); (b) preparing and forwarding of solicitation correspondence/materials; (c) preparation of numerous and diverse university and organizational reports; (d) monitoring of university scholarship/awards programs administered by the Foundation; and (e) data entry activity related to donor information files.
Alumni Association Activities

General Facts

While growth in Alumni Association activities continued on an upward spiral during 1999, a major focus of the Association was centered upon the retirement of Dr. Kent Wyatt and the search process and naming of Dr. David L. Potter as the sixth president of Delta State University.

The Alumni and the Foundation staff played a lead role in coordinating a series of retirement tributes honoring Dr. Wyatt. In May 1999 approximately 700 faculty, staff, students, alumni and friends attended a Retirement Gala on the Delta State campus to say “thank you” to Dr. and Mrs. Wyatt for their love, loyalty and leadership over the past quarter century.

Under the leadership of Dr. Leroy Morganti, vice president for University Advancement, representatives of the Alumni Association and DSU Foundation were among those participating in the selection process for the University’s sixth president, Dr. David L. Potter. Also playing a key role were members of the Alumni-Foundation staff as they were host to not only the IHL State College Board of Trustees but also the four finalists who visited the campus for in-depth interviews.

Other Highlights

Dr. Jim Avery, Alumni Association president, announced plans to join with the Offices of Recruiting and Career Services in promoting and enlisting alumni support for their respective areas.

At its 1999 Homecoming celebration in October, Ambassador Jeanette Hyde of Raleigh, N. C. was recognized as the University’s “Outstanding Alumnus.” Other honorees included Mickey Robinson, recipient of the Hugh Ellis Walker Alumni Service Award, Darnell Scott, recipient of the Kent Wyatt Young Alumnus Service Award and Christen Aguzzi, recipient of the H. L. Nowell Student Alumni Service Award. Chosen to receive the Gladys Castle “Friend of Delta State” Service Award was Jon Levingston of Clarksdale.

Debbie Davis, coordinator of Alumni Activities, scheduled and coordinated numerous in-state and out-of-state alumni chapter meetings and travel excursions for The DSU Travelers. “Pig Pickin’” once again set records as 1800 plus participated in the event prior to the Statesmen football home opener.
Membership

The number of Delta State alumni of record at the start of the report period (living alumni with a valid address) was 18,395. Of this number, 2,669 (1303 Annual & 1366 Life) were classified as active dues-paying members.

The membership statistics reflect growth in the area of "Life" membership with efforts to move "inactive" alumni to "active" status remaining a challenge.

Finances

Under the leadership of its Board of Directors, the Association continued to reflect a positive growth in the area of finances. A compilation of financial statements information was prepared for the fiscal year 1998-1999 by the Association's auditor (Edmondson & Burchfield) and is presented as follows:

DELTA STATE UNIVERSITY ALUMNI ASSOCIATION
STATEMENT OF FINANCIAL POSITION
June 30, 1999

<table>
<thead>
<tr>
<th>ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash in banks</td>
<td>$ 55,777.11</td>
</tr>
<tr>
<td>Cash in money market funds</td>
<td>7,229.93</td>
</tr>
<tr>
<td>Investments (at market)</td>
<td>137,210.52</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$ 200,217.56</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Deposits held in custody</td>
<td>$ 1,993.66</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>1,993.66</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>176,529.58</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>21,694.32</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>198,223.90</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$ 200,217.56</strong></td>
</tr>
</tbody>
</table>
DELTA STATE UNIVERSITY ALUMNI ASSOCIATION
STATEMENT OF ACTIVITIES
For the Year Ended June 30, 1999

<table>
<thead>
<tr>
<th>Revenues, Gains, and Other Support</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership dues</td>
<td>$34,072.00</td>
<td>$3,288.00</td>
<td>$37,360.00</td>
</tr>
<tr>
<td>Contributions</td>
<td>85.00</td>
<td>85.00</td>
<td>170.00</td>
</tr>
<tr>
<td>Investment income</td>
<td>21,935.02</td>
<td></td>
<td>21,935.02</td>
</tr>
<tr>
<td>Unrealized gains on investments</td>
<td>2,743.78</td>
<td>2,743.78</td>
<td></td>
</tr>
<tr>
<td>Special events</td>
<td>11,699.84</td>
<td>14,921.50</td>
<td>26,621.34</td>
</tr>
<tr>
<td>Group travel</td>
<td>10,541.00</td>
<td></td>
<td>10,541.00</td>
</tr>
<tr>
<td>Affinity card payments</td>
<td>9,655.25</td>
<td></td>
<td>9,655.25</td>
</tr>
<tr>
<td>Rent - Simmons Room</td>
<td>5,225.00</td>
<td></td>
<td>5,225.00</td>
</tr>
<tr>
<td>Chapter meetings</td>
<td>6,337.36</td>
<td></td>
<td>6,337.36</td>
</tr>
<tr>
<td>Donated services</td>
<td>141,124.76</td>
<td></td>
<td>141,124.76</td>
</tr>
<tr>
<td>Other</td>
<td>180.00</td>
<td></td>
<td>180.00</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>15,389.20</td>
<td>(15,389.20)</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Total Revenues, Gains, and Other Support | 258,988.21 | 2,820.30 | 261,808.51 |

Expenses and Losses:
Program services:
  University development | 9,374.99 | 9,374.99 |
  Group travel           | 11,170.35| 11,170.35|
  Newsletters            | 11,814.17| 11,814.17|
  Scholarships           | 8,823.14 | 8,823.14 |
  Special events         | 22,882.15| 22,882.15|
  Chapter meetings       | 12,867.20| 12,867.20|
  Other                  | 7,266.21 | 7,266.21 |
Supporting services:
  Management and general | 161,544.36|       | 161,544.36|

Total Expenses and Losses | 245,742.57 | - | 245,742.57 |

Change in Net Assets | 13,245.64 | 2,820.30 | 16,065.94 |

Net Assets at beginning of year | 163,283.94| 18,874.02| 182,157.96|

Net Assets at end of year | 176,529.58| 21,694.32| 198,223.90|
DELTA STATE UNIVERSITY ALUMNI ASSOCIATION  
STATEMENT OF CASH FLOWS  
For the Year Ended June 30, 1999

<table>
<thead>
<tr>
<th>Cash flows from Operating Activities:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$ 16,065.94</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash provided by operating activities:</td>
<td></td>
</tr>
<tr>
<td>Increase in deposits held in custody</td>
<td>500.13</td>
</tr>
<tr>
<td>Unrealized gains on investments</td>
<td>(2,743.78)</td>
</tr>
<tr>
<td><strong>Net cash provided by operating activities</strong></td>
<td><strong>13,022.29</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cash flows from Investing Activities:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceeds from sale of investments</td>
<td>34,025.06</td>
</tr>
<tr>
<td>Purchase of investments</td>
<td>(54,865.87)</td>
</tr>
<tr>
<td><strong>Net cash used in investing activities</strong></td>
<td><strong>(20,840.81)</strong></td>
</tr>
</tbody>
</table>

| Net decrease in cash and cash equivalents | (7,018.52) |
| Cash and cash equivalents at beginning of year | 70,025.56 |
| Cash and cash equivalents at end of year  | 63,007.04 |
History:

While the Delta State Alumni Association (the "Association") was not formerly recognized until 1964, graduates were encouraged to return to the campus and continue the institution's traditions through the efforts of Gladys Castle, who served as the school's voluntary alumni secretary from 1930-1948.

H. L. Nowell, also a member of the college staff, assumed the responsibility of organizing the Homecoming activities following Castle's departure. In 1956, Nowell was appointed part-time Alumni Secretary, in addition to serving as Dean of Men and Dean of Student Activities.

The Association began its formal operations in 1964 when Dr. Kent Wyatt was appointed as the institution's first full-time Alumni Secretary. Hugh Ellis Walker was named Alumni Secretary in 1969 and headed the Association's efforts until reorganization in 1987.

On July 1, 1987, the administrative staffs of the DSU Alumni Association and the DSU Foundation were combined under the leadership of Hugh Ellis Walker. An organizational structure was designed to facilitate the daily operations of both organizations. Upon the retirement of Walker in 1993, Dr. Don A. Skelton was named executive director with Vicki Fioranelli being named associate director. In 1998, Fioranelli accepted the position of director of Career Services and Placement at Delta State and Debbie Davis was named coordinator of alumni activities. Effective July 1, 1998, the administrative staff of the DSU Alumni Association and the DSU Foundation, in addition to Skelton and Davis, were Felicia Applegate, assistant director, and Keith Fulcher, coordinator of development.

Today, a 27 member board of directors, comprised of six officers, five district and at-large representatives, eleven representatives of constituency or special interest groups, three presidential appointees, and the Foundation president provide policy and budgetary leadership for the Association. The board meets three times a year to transact business and provide guidance for the administrative staff of the organization.
Mission:

- To perpetuate the memories of University life.
- To provide a medium through which interest in Delta State may be prompted.
- To bind the alumni into a united fellowship working together for the advancement of the University.
- To serve as a link between the University and its alumni.
- To act as a service organization for former Delta State students.

Eligibility:

All alumni and friends of Delta State University are eligible for membership. An alumnus is defined as a graduate or former student who attended Delta State as a full-time student for at least one quarter or semester.

Membership Classification:

Active……..An alumnus who has paid the current annual dues as prescribed by the Association.

Associate….A membership available to all interested individuals who desire to pay the regular association dues. Associate members are entitled to all privileges of the organization, except those of voting and holding office.

Life……….Those members who have purchased their life membership according to the dues prescribed by the Association.

Honorary…Awarded to retired faculty and staff members and other friends of the University who have made outstanding contributions to Delta State University or the Alumni Association.

Dues:

The current dues structure, as approved by the Alumni Association board of Directors effective February 1, 1997, is as follows. The membership dues are $20.00 annually for an individual, $30.00 for a couple, and $300.00 for an individual life membership, with a married couple’s joint life membership being $400.00 ($200.00 each). Graduates receive one year’s free membership following Commencement.
Services and Activities:

Scholarships for Alumni Dependents and Student Alumni Association Officers

Alumni Chapter Development (28 in-state and 9 out-of state)

Constituency Group Development - current groups include Accounting, Art, Athletic, Aviation, Black Alumni, Economics & Finance, Golden Circle (50-year plus graduates), Family & Consumer Sciences, Music, Nursing, Student Alumni and Young Alumnus.

Open House activities at athletic and other University events.

Alumni Recognition Programs (outstanding alumnus, service awards and chapter awards).

Alumni referral services for student recruiting and career services/placement.

Sponsored campus events (homecoming, pig pickin, faculty & staff recognition).

Class Reunions and Group Travel Tours.

Alumni Affinity Credit Card, Alumni Directory, and Alumni Magazine

Benefits of Membership:

Membership Cards & Decals provided for member identity.

Birthday recognition from University and Association.

Eligible for alumni awards and special recognition.

Dependents eligible for scholarship consideration and out-of-state tuition waiver.

Eligible to receive alumni magazine and other campus updates.

The pride of actively supporting “YOUR” university.

Financial Support:

Financial support of the Association is derived from three sources. These Sources include (a) membership dues, (b) alumni credit card revenue, and (c) institutional support. Budgeted items provided by institutional support include salaries, commodities, telephone and postage. Income from dues and credit card revenue are utilized to supplement the Association budget and offset expenses of chapter promotions, travel expense, automobile lease, special projects and publications.
Foundation Activities

General Facts

The DSU Foundation, under the leadership of President Ned A. Mitchell, had a most productive year in 1999. In addition to providing assistance and support for activities surrounding the retirement of Dr. Kent Wyatt and the installation and inauguration of Dr. David L. Potter, the Foundation also finalized the university’s first-ever campaign on December 31. With an original goal of $5 million, The Campaign for Delta State more than doubled that figure with a final total in pledges and gifts of $10,719,016.

Through the diligent efforts of Keith Fulcher, coordinator of Development Activities, and the alumni-foundation staff, the number of alumni and friends participating in developmental activity continued to increase.

Other Highlights

Primarily through the leadership efforts of Baseball Coach Emeritus Dave “Boo” Ferriss, a goal to provide private support for the construction of a 10,400 square-foot indoor baseball practice facility was successfully fulfilled with more than $400,000 in pledges being attained. On the recommendation of University President David Potter, the State College Board of Trustees approved that this facility be named for longtime supporter and alumnus Bryce Griffis of Starkville.

On December 17, 1999, a press conference was held in Clarksdale to announce that a goal of $750,000 had been raised to assist in the purchase of the St. Elizabeth Catholic School property to house an educational partnership between Delta State University and Coahoma Community College. Included in the purchase are existing classroom and gymnasium facilities and also the Cutrer Mansion, which previously had been listed as one of the state’s most endangered historic structures. With the DSU Foundation acting as the fiscal agent and through the leadership efforts of Board member and Clarksdale businessman Jon Levingston, it is felt that the project provides an educational opportunity which will benefit both adults and children for generations to come.

Graphs and charts depicting a campaign recap and designated areas of growth within the Foundation Development Program are shown on the following page.
DELTA STATE UNIVERSITY FOUNDATION
Campaign Recap by Designated Area

<table>
<thead>
<tr>
<th>DESIGNATED AREA</th>
<th>GIFTS/PLEDGES</th>
<th>CASH RECEIVED</th>
<th>PLANNED GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical/Science Gifts</td>
<td>$1,187,661.97</td>
<td>$851,713.47</td>
<td>$0</td>
</tr>
<tr>
<td>Performing Arts Gifts</td>
<td>$1,981,803.57</td>
<td>$1,426,610.95</td>
<td>$1,525,000.00 (1)</td>
</tr>
<tr>
<td>Unrestrict Gifts/Faculty Enr.</td>
<td>$1,463,905.33</td>
<td>$1,081,403.55</td>
<td>$310,000.00 (1)</td>
</tr>
<tr>
<td>Other Gifts (Including Tangible Property Gifts)</td>
<td>$2,887,595.22</td>
<td>$3,057,786.18</td>
<td>$1,363,050.00 (10)</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
<td>$7,520,966.09</td>
<td>$6,422,187.43</td>
<td>$3,198,050.00</td>
</tr>
<tr>
<td><em>GRAND TOTAL:</em></td>
<td><strong>$10,719,016.09</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**THE CAMPAIGN FOR DELTA STATE**

Growth in Privately Funded Scholarships

30% Planned Giving
70% Other gift types
Delta State University
Foundation Fact Sheet

History:

The Delta State University Foundation, Inc was established in 1967 with Dave “Boo” Ferriss, in addition to serving as the University’s baseball coach, serving as its first director.

The Foundation supports the mission of the University through the solicitation and management of private contributions and gifts. Since its establishment, it has grown steadily in assets and in the level and range of support provided to Delta State’s academic and student development programs. Enrichment activities provided through the Foundation’s development program touch many areas of university life, including faculty development, student recruitment, student scholarships, and financial aid.

On July 1, 1987, the administrative staff of the DSU Alumni Association and the Foundation was combined under the leadership of Hugh Ellis Walker, whom previously served as Alumni Secretary. An organizational structure, under the supervision of the executive director for Alumni and Foundation, was designed to facilitate the daily operations of both organizations. Upon the retirement of Walker, Dr. Don A. Skelton was named to the position of executive director effective July 1, 1993.

Today, a 30 member board of directors, an elected group of business and professional leaders, provides administrative and budgetary leadership for the Foundation. The board meets three times a year to transact business and provide guidance for the administrative staff of the organization.

Of increasing importance is the Foundation’s responsibility for the fiscal administration of contributions received in behalf of the University from private citizens, companies, corporations and foundations. All monies and gifts-in-kind received into the Foundation from these sources are routed through the chief development officer (the "executive director") to provide for proper recording and acknowledgement. Funds are invested according to policies recommended by the Foundation investment committee, established by the board of directors, and disbursed according to donor specifications, providing that these specifications do not conflict with current tax laws and Foundation policy.
Mission Statement:

The Delta State University Foundation, Inc. is a private non-profit organization dedicated to the growth, development and enhancement of Delta State University and its faculty and students, with special emphasis given to the attainment and maintenance of academic quality through the solicitation and professional management of gifts derived from private sources.

Finances:

The financial information used in this report were taken from the Auditor’s Report as prepared by the Foundation’s auditor, Edmondson & Burchfield.

Delta State University Foundation, Inc.
Balance Sheet
June 30, 1999

Assets
Cash in banks 225,480.66
Cash in money market funds 395,860.57
Contributions receivable (note B) 1,359,062.25
Investments (note D) 7,272,466.51
Investment in life insurance contract 20,000.00
Other 3,896.68
Fixed assets (note G) 80,678.09
Total assets 9,357,444.76

Liabilities & Net Assets

Liabilities
Accounts Payable 8,799.32
Property held in custody 163,401.56
Total liabilities 192,200.88

Net Assets
Unrestricted 881,499.23
Temporarily restricted 5,194,667.96
Permanently restricted 3,089,076.69
Total net assets 9,165,243.88
Total liabilities and net assets 9,357,444.76

The accompanying notes are an integral part of the financial statements.
### Delta State University Foundation, Inc.
#### Statement of Activities
#### For the Year Ended June 30, 1999

<table>
<thead>
<tr>
<th>Revenues, gains, and other support:</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>193,431.29</td>
<td>1,034,587.88</td>
<td>194,760.04</td>
<td>1,422,779.21</td>
</tr>
<tr>
<td>Investment income (note D)</td>
<td>119,595.07</td>
<td>240,028.30</td>
<td>202,906.45</td>
<td>562,529.82</td>
</tr>
<tr>
<td>Unrealized losses on investments</td>
<td>(1,326.14)</td>
<td>(22,197.77)</td>
<td>(74,044.45)</td>
<td>(97,568.36)</td>
</tr>
<tr>
<td>Other</td>
<td>116,261.76</td>
<td>27,112.16</td>
<td></td>
<td>143,373.92</td>
</tr>
<tr>
<td>Net assets released from restrictions-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfaction of program restrictions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total revenues, gains, and other support</td>
<td>498,419.94</td>
<td>(350,122.34)</td>
<td>(148,297.60)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>926,381.92</td>
<td>929,408.23</td>
<td>175,324.44</td>
<td>2,031,114.59</td>
</tr>
</tbody>
</table>

#### Expenses & losses

<table>
<thead>
<tr>
<th>Program services</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>University &amp; faculty support</td>
<td>253,020.01</td>
<td></td>
<td></td>
<td>253,020.01</td>
</tr>
<tr>
<td>Scholarships &amp; awards</td>
<td>193,133.36</td>
<td></td>
<td></td>
<td>193,133.36</td>
</tr>
<tr>
<td>Other</td>
<td>206,741.98</td>
<td></td>
<td></td>
<td>206,741.98</td>
</tr>
<tr>
<td>Supporting services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management &amp; general</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund raising</td>
<td>193,699.18</td>
<td></td>
<td></td>
<td>193,699.18</td>
</tr>
<tr>
<td>Total expenses</td>
<td>122,604.14</td>
<td>-</td>
<td>-</td>
<td>122,604.14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change in net assets</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net assets at beginning of year</td>
<td>(42,815.75)</td>
<td>929,408.23</td>
<td>175,324.44</td>
<td>1,061,915.92</td>
</tr>
<tr>
<td></td>
<td>924,316.08</td>
<td>4,265,259.63</td>
<td>2,913,752.25</td>
<td>8,103,327.96</td>
</tr>
<tr>
<td>Net assets at end of year</td>
<td>881,499.33</td>
<td>5,194,657.86</td>
<td>3,089,076.69</td>
<td>9,165,243.88</td>
</tr>
</tbody>
</table>

The accompanying notes are an integral part of the financial statements.
Delta State University Foundation, Inc.
Statement of Cash Flows
For the Year Ended June 30, 1999

Cash flows from operating activities:
Change in net assets 1,061,915.92
Adjustments to reconcile change in net assets to net cash provided by operating activities:
Depreciation 7,324.65
Increase in other assets (455.34)
Decrease in contributions receivable 89,115.55
Increase in deposits held in custody 12,793.66
Decrease in accounts payable (7,596.23)
Disposition of interest in split-dollar life insurance 100,000.00
Unrealized losses on investments 97,568.36
Net cash provided by operating activities 1,360,666.57

Cash flows from investing activities:
Purchase of fixed assets (16,841.00)
Purchase of investments (1,195,348.82)
Premium paid on split-dollar life insurance (10,000.00)
Net cash used by investing activities (1,222,189.82)

Net decrease in cash and cash equivalents 138,470.75
Cash & cash equivalents at beginning of year 482,864.48
Cash & cash equivalents at end of year 621,341.23

The accompanying notes are an integral part of the financial statements.
DELTA STATE UNIVERSITY FOUNDATION, INC.
NOTES TO THE FINANCIAL STATEMENTS

Note A - Organization and Summary of Significant Accounting Policies

Organization
The Delta State University Foundation, Inc., (The Foundation) is a Mississippi nonprofit corporation which was chartered in 1967. Its purpose is to support and promote the academic programs at Delta State University. Its revenues are primarily from public support and income from investments.

Income Tax Exemption
The Foundation is exempt from federal income taxes under the provisions of Section 501(c)(3) and is not a private foundation.

Basis of presentation
The financial statements of the Foundation have been prepared on the accrual basis of accounting.

Display of Net Assets by Class
The accompanying financial statements have been prepared in conformity with the disclosure and display requirements of the Financial Accounting Standards Board (FASB) as set forth in Statement of Financial Accounting Standards No. 117, "Financial Statements of Not-for-Profit Organizations." Accordingly, the net assets of the Foundation are reported in each of the following three classes: (a) unrestricted net assets, (b) temporarily restricted net assets, and (c) permanently restricted net assets. Net assets of the restricted classes are created only by donor-imposed restrictions on their use. All other net assets, including board-designated or appropriated amounts, are legally unrestricted and are reported as part of the unrestricted class.

Revenue Recognition
The Foundation recognizes all contributed support received as income in the period received or unconditionally pledged under the provisions of FASB Statement 116, "Accounting for Contributions Received and Contributions Made." Contributed support is reported as unrestricted or restricted depending on the existence of donor stipulations that limit the use of the support. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, the restricted net asset is reclassified to unrestricted net assets and reported in the statement of activity as net assets released from restrictions.

Donated Services and Facilities
The Foundation records various types of in kind support including contributed facilities and services. Recognition of contributed facilities is described in Note H. Contributed services are recognized if the services received (a) create or enhance long-lived assets or (b) require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation. The amounts reflected
Note A - Organization and Summary of Significant Accounting Policies (continued)

in the accompanying financial statements as donated services and facilities are offset by like amounts included in expenses.

Property and Equipment
Property and equipment acquisitions are recorded at cost or fair market value when received. Depreciation is provided over the estimated useful life of each class of depreciable assets and is computed using the straight line method. Property costing in excess of $500 and having a useful life in excess of one year is capitalized.

Advertising Costs
Advertising costs are expensed as incurred.

Cash and Cash Equivalents
For financial statement purposes, the Foundation considers all highly liquid investments with a original maturity of three months or less to be cash equivalents.

Compensated Absences
No provision has been made for the Foundation's share of any liability for compensated absences.

Estimates
The preparation of financial statements in accordance with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Investments
The Foundation has adopted Statement of Financial Accounting Standards No. 124 "Accounting for Certain Investments Held by Not-for-Profit Organizations". Under this standard, investments in marketable securities with readily determinable fair values and all investments in debt securities are valued at their fair values in the balance sheet. Unrealized gains and losses are included in the change in net assets. Increases and decreases in fair values are allocated to unrestricted, temporarily restricted, and permanently restricted net assets since the investment returns are considered to have the same donor restrictions as the invested assets.
Note A - Organization and Summary of Significant Accounting Policies (continued)

Agency or Intermediary Transactions
The Foundation acts as an intermediary for various organizations related to Delta State University. The Foundation has no discretion to direct the property held for those organizations, other than as instructed by donors or the organizations. Property received for the benefit of those organizations is not recorded as revenues or support, and the disposition of property to or for those organizations is not recorded as expenses. Property held at June 30, 1999 was composed of $183,401.56 in cash.

Note B - Contributed Support Receivable
Contributed support receivable consists of the following:

<table>
<thead>
<tr>
<th>Unconditional Promises to Give</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Amounts due in less than one year</td>
<td>769,572.53</td>
</tr>
<tr>
<td>Amounts due in 1 - 5 years</td>
<td>736,972.99</td>
</tr>
<tr>
<td>Amounts due in more than 5 years</td>
<td>3,523.65</td>
</tr>
<tr>
<td>Allowance for uncollectibles</td>
<td>(151,006.92)</td>
</tr>
<tr>
<td></td>
<td>1,359,062.25</td>
</tr>
</tbody>
</table>

Gross pledges of $1,645,569.99 were discounted $135,500.82 to reflect the present value of future cash flows. A 5.5% rate was used to discount the gross pledges.

Note C - Conditional Support Receivable
The Foundation is named as a beneficiary in the wills of several donors. The estimated value of these pledges for which a value can be determined is approximately $3,100,000. These pledges are designated to benefit the Performing Arts Center, the Foundation's Enrichment program, and other programs administered through the Foundation. These pledges are not recorded in the financial statements since they are classified as intentions to give rather than unconditional promises to give. Revenue from these pledges will be recognized when the pledges become unconditional.

Note D - Investments
Investments are presented in the financial statements at market value and are summarized as follows:

<table>
<thead>
<tr>
<th></th>
<th>Cost</th>
<th>Market Value</th>
<th>Carrying Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketable equity securities</td>
<td>4,197,970.10</td>
<td>4,933,983.84</td>
<td>4,933,983.84</td>
</tr>
<tr>
<td>Marketable debt securities</td>
<td>2,469,458.23</td>
<td>2,338,482.67</td>
<td>2,338,482.67</td>
</tr>
<tr>
<td></td>
<td>6,667,428.33</td>
<td>7,272,466.51</td>
<td>7,272,466.51</td>
</tr>
</tbody>
</table>
DELTA STATE UNIVERSITY FOUNDATION, INC.
NOTES TO THE FINANCIAL STATEMENTS

Note D - Investments (continued)
Investment income consists of the following:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest &amp; dividends</td>
<td>214,939.85</td>
</tr>
<tr>
<td>Realized gains</td>
<td>430,640.84</td>
</tr>
<tr>
<td>Broker management fees</td>
<td>(83,050.87)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>562,529.82</strong></td>
</tr>
</tbody>
</table>

All investment returns are included as operating amounts.

Note E - Temporarily Restricted Net Assets
Temporarily restricted net assets are available for the following purposes:
Program Activities:
Educational activities, academic scholarships, academic achievement awards, faculty &
staff achievement awards, campus beautification, and support for offering performing arts
and other cultural opportunities to the community.

Note F - Permanently Restricted Net Assets
Permanently restricted net assets are restricted to:
Investment in perpetuity, the income from which is expendable to support:
Program Activities:
Economic development programs, academic scholarships, and faculty recruitment and
enhancement.

Note G - Property & Equipment
Property and equipment consist of the following:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Improvements</td>
<td>58,129.49</td>
</tr>
<tr>
<td>Autos</td>
<td>13,345.00</td>
</tr>
<tr>
<td>Office and other equipment</td>
<td>28,408.38</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>99,882.87</td>
</tr>
</tbody>
</table>

Less: Accumulated depreciation

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accumulated depreciation</strong></td>
<td><strong>(19,204.78)</strong></td>
</tr>
<tr>
<td><strong>Total depreciation</strong></td>
<td><strong>80,678.09</strong></td>
</tr>
</tbody>
</table>

Depreciation expense for the period was $7,324.65.
Equipment costing $16,841.00 was acquired during this fiscal year.
The Foundation also uses office furniture and equipment furnished by Delta State University.

Note H - Donated Services and Facilities
Compensation for the Foundation's Executive Director and Assistant Director, as well as
a majority of the office staff is provided by Delta State University. These services have
been valued in the financial statements at $104,261.76 which is the actual amount paid
plus a provision for fringe benefits.
Delta State University also provides the facilities housing the Foundation's offices. The
rent-free use of these facilities has been valued at the fair market value for comparable
office space in this area. A provision of $12,000.00 has been included in the financial
statements for these facilities.
Note I - Pension Plan
Through its reimbursement of a portion of the staff's salaries and fringe benefits to Delta State University, the Foundation participates in the Public Employees' Retirement System of Mississippi (PERS), a cost-sharing multiple-employer defined benefit pension plan. The Foundation's covered payroll was $76,964.14.

Membership in PERS is a condition of employment for all eligible employees of the State of Mississippi, public schools, institutions of higher learning, community colleges, and eligible employees of municipalities, counties, and other political subdivisions that have entered into a membership agreement approved by the PERS Board of Trustees.

Pension benefits are paid to retiring employees based on their years of service and average annual compensation. Additional benefits are paid to employees with over 25 years of credited service. A member may elect reduced benefits with a provision for payments to be made to a beneficiary after their death. Certain death and disability benefits are also available. Benefits vest upon completion of 4 years of credited service.

Covered employees are required by statute to contribute 7.25% of their salary to PERS. If an employee leaves covered service, accumulated employee contributions plus related investment earning allocations may be refunded to the employee or designated beneficiary. Benefit and contribution provisions are established by State law and may be amended only by the State of Mississippi Legislature. The contribution requirement for the year ended June 30, 1999 was $13,083.90 which consisted of $7,504.00 from the Foundation and $5,579.90 from employees. The employer and employee contributions represented 9.75% and 7.25% respectively of covered payroll.

Note J - Split-Dollar Life Insurance
The Foundation participated in the Institutions of Higher Learning Insurance Program entitled "Golden Handcuff Program". The Foundation agreed to contribute a minimum of $10,000 per year up to a ten year period to the Equitable Life Insurance Company for a split-dollar insurance fund for the benefit of the University President. Ten payments have been made to date. The University President owns the policy, but the Foundation had certain rights which include the right to make and receive policy loans. The Foundation has relinquished its right to a return of its investment in the contract to the University President in exchange for certain continued services by him after his retirement. The accumulated premiums paid and transferred under this arrangement are reflected in the statement of activities as a charge to unrestricted program expenses.

Note K - Operating Leases
The Foundation incurred lease expense of $12,883.70 under operating leases this fiscal year.
Note K - Operating Leases (continued)

Future minimum lease payments for these leases are as follows:

Year Ending

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-30-2000</td>
<td>7,979.76</td>
</tr>
<tr>
<td>6-30-2001</td>
<td>1,596.26</td>
</tr>
<tr>
<td></td>
<td>9,576.02</td>
</tr>
</tbody>
</table>

Note L - Financial Instruments
Off-Balance-Sheet Risk
The Foundation is not a party to any financial instruments which have off-balance-sheet risk of accounting loss.

Significant Group Concentrations of Credit Risk

Financial instruments which potentially subject the Foundation to significant concentrations of credit risk consist of cash and cash equivalents, pledges receivable, marketable equity securities, and marketable debt securities.

The Foundation maintains cash and cash equivalents in commercial banks in Cleveland, Mississippi, and an investment firm. The deposits in commercial banks are covered by federal deposit insurance and securities pledged as collateral for amounts in excess of insurance coverage. The money market funds held by the investment firm are subject to SIPC insurance and additional insurance provided by the firm.

Concentrations of credit risk from pledges receivable are limited due to the size of the current donor base, and the dispersion of those donors. See the disclosure relative to concentrations for additional information about donors.

The portfolio of marketable equity securities is well diversified and includes investments in a number of national and international entities. The portfolio of marketable debt securities includes investments in U.S. Treasury securities, corporate debt securities, and government bond funds.

Note M - Concentrations
The Foundation is supported primarily by contributions from the public. A majority of the contributors are in the State of Mississippi. Pledges from three contributors account for more than 10% each of contributions receivable and approximately 50% of total contributions receivable. One contributor has pledged $1,500,000 of the conditional support receivable.
Investment and Financial Growth

The financial report of the DSU Foundation Board of Directors effective December 31, 1999 shows the growth in financial assets since 1991.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-31-90</td>
<td>$1,652,424</td>
</tr>
<tr>
<td>12-31-91</td>
<td>2,225,754</td>
</tr>
<tr>
<td>12-31-92</td>
<td>2,688,252</td>
</tr>
<tr>
<td>12-31-93</td>
<td>3,060,194</td>
</tr>
<tr>
<td>12-31-94</td>
<td>2,986,063</td>
</tr>
<tr>
<td>12-31-95</td>
<td>3,926,687</td>
</tr>
<tr>
<td>12-31-96</td>
<td>5,023,071</td>
</tr>
<tr>
<td>12-31-97</td>
<td>6,303,343</td>
</tr>
<tr>
<td>12-31-98</td>
<td>7,321,519</td>
</tr>
<tr>
<td>12-31-99</td>
<td>9,890,972</td>
</tr>
</tbody>
</table>

Effective 12-31-99, the asset allocation and distribution for Foundation assets were as follows:

<table>
<thead>
<tr>
<th>Asset</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stocks</td>
<td>$6,203,740</td>
<td>68.1%</td>
</tr>
<tr>
<td>Bonds</td>
<td>2,378,951</td>
<td>26.1%</td>
</tr>
<tr>
<td>Cash</td>
<td>523,865</td>
<td>5.8%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$9,106,556</strong></td>
<td><strong>5.8%</strong></td>
</tr>
<tr>
<td><strong>Total Cash</strong></td>
<td><strong>784,416</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$9,890,972</strong></td>
<td></td>
</tr>
</tbody>
</table>

The investment objectives of the DSU Foundation are to attain a favorable absolute return of the entire Fund consistent with preservation of capital, with some emphasis on long-term growth, and reasonable current income. These objectives represent hoped-for results and are defined in the following Goals.

1. Total fund investments should earn over time an average annual "real" rate of return (over inflation) of 6%.
2. Equity investments should earn over time an average annual "real" rate of return of 7%.
3. Intermediate term debt should earn over time an average "real" rate of return of 3%.
4. The Fund should experience long-term growth in fund assets.
5. In relative terms, the Fund should exceed the performance of the major indices over a full market cycle.
6. The performance of the Fund shall be monitored quarterly and reviewed over a full market cycle, which represents 3 to 5 years.
Administrative Staff Personnel
Noteworthy Activities and Accomplishments

The Executive Director
- National Society for Fund Raising Executives (NSFRE)
- 2nd Vice President, Cleveland Noon Lion's Club
- DSU Administrative Staff Council
- DSU Bologna Performing Arts Center Advisory Council
- DSU School of Nursing Advisory Board
- DSU Job Classification Committee
- Omicron Delta Kappa (ODK)
- Kappa Delta Pi

The Assistant Director
- Attended BANNER Summit Conference in San Francisco, California
- Cleveland Chamber of Commerce
- Cleveland United Way Volunteer
- Cleveland Rotary Club; Fund Raising Committee
- Cleveland Garden Club, President
- Delta Delta Delta Sorority, Cleveland Alumni Chapter
- DSU Student Alumni Association, Advisor
- DSU Information and Technology Committee
- DSU BANNER Users Advisory Committee
- DSU Scholarships and Awards Committee
- DSU Job Classification Committee
- DSU Faculty Wives, Vice President for Membership

Coordinator of Alumni Activities
- Attended CASE (Council for Advancement & Support of Education) Conference in Atlanta
- Inter-Alumni Council, Staff Advisor
- Task Force on Recruiting and Alumni Relations
- 75th Anniversary Planning Committee, Publicity Sub-Committee
- Inauguration Arrangements Committee
- Student Hall of Fame Selection Committee
- DSU Courtesy Committee
- Cleveland Exchange Club, Spring Fling Committee

Coordinator of Development Activities
- Attended CASE (Council for Advancement & Support of Education) Conference in Atlanta
- National Society for Fund Raising Executives (NSFRE)
- 2000 Crosstie Art Council’s 5K Run & Walk, Co-Chair
- 2000 Home Show (Cleveland-Bolivar County Chamber of Commerce)
- 2000 American Cancer Society’s “Relay for Life”, Logistics Chair
- Cleveland Rotary Club, Chair of Vocations Committee
- DSU Census Awareness Committee
Unit Goals and Outcome Assessments

1999-2000 Alumni-Foundation
Strategic Planning Process

- Goals: three to five year goals approved by the Boards of Directors
- Objectives: multi-year (1,3,5) activities recommended by committee structure
- Strategies: annual activities developed by the staff to accomplish objectives

GOALS

The following goals serve as a blueprint for the DSU Alumni Association and the DSU Foundation, Inc. It is through the attainment of these goals that the Association and the Foundation have the opportunity to proactively establish controls that will ensure that alumni-foundation activities contribute to the long-range mission and goals of the University.

Membership/Donor Development

Sustain a sound financial operation through a strong membership/donor program and other sources of support.

Development Program

Develop a comprehensive giving program designed to benefit all aspects of the University.

Communications

Implement a comprehensive internal and external communication plan designed to promote a positive image of Delta State University alumni and foundation activities.

Information and Records Management

Design, implement, fully utilize, and accurately maintain a complete alumni and foundation management information system.

Program Development

Build a strong relationship between the University and her alumni and friends through innovative and appealing programs.

Staff and Facilities

Maintain a professional operating environment that will ensure an effective and efficient alumni-foundation staff and upgrade facilities and equipment to keep pace with organizational growth.
Unit Goal #1

Sustain a sound financial operation through a strong membership/donor program and other avenues of support.

Institutional Goal

See #18, #19, and #21 of the University Goals attachment.

Expected Results

Success will be evidenced in all areas of alumni and foundation activity (i.e., number of dues-paying alumni; amount of monies raised).

Assessment Procedures

The administrative staff and committee members of the Association and Foundation leadership will monitor all activity areas and ensure adherence to a pre-approved budget structure.

Actual Results

Effective 12-31-99, the Alumni Association membership (active) was 3481 compared to a 12-31-98 figure of 3421. Life membership continues to be popular with the University’s alumni as 1366 alumni now are life members compared to 1270 in 1998. It is evident that more emphasis is needed in the area of membership solicitation.

Results of The Campaign for Delta State was significantly successful as $10.7 million in gifts and pledges was raised for the University, more than double the original goal of $5 million.

Total financial assets of both the Alumni Association and DSU Foundation increased significantly during 1999.

Use of Results

Upon recommendation of then Alumni Association Board of Directors, the staff has implemented an aggressive program of sponsored activities to encourage alumni to return to the campus and become more active in their support of the University.

The Foundation Board of Directors has initiated a campaign planning study in anticipation of beginning a new campaign effort for the 2000-2001 school year when the University celebrates its 75th Anniversary.

Investment gains continued to reflect positive gains in 1999, indicating that current investment policy and the use of outside managers for investment strategy is sound and advisable.
Unit Goal #2

*Develop a comprehensive giving program designed to benefit all aspects of the University.*

Institutional Goal

See #9, #10, #13, #15, #18, 19, #20 and #21 of the University Goals attachment.

Expected Results

It is anticipated that departments will gain needed funds to ensure educational change.

The donor base for private support will continue to grow and ensure “repeat” donor participation in the development program.

The attractive option of donors participating through the Planned Giving Program will continue to grow and ensure private support for the future of the University.

Assessment Procedures

Adherence to IRS acknowledgement guidelines not only track and document gifts but also serve to encourage donors to continue providing private support.

Solicitation efforts through mail-outs to target populations and special interest groups will continue to be monitored as to their effectiveness.

Follow-up calls and recognition of Annual Fund donors provide an avenue for feedback regarding University activities.

Actual Results

Evaluation of accounts reveal that departments are benefiting financially from participating in the development program by assisting the staff in identifying and soliciting their graduates.

In addition to gains for colleges and departments, other areas such as faculty development, student scholarships, the performing arts and athletics are also experiencing growth in financial support.

Use of Results

There is enthusiasm among campus personnel with regard to development activities, resulting in college and department personnel “joining” the development staff in its fund raising efforts. An example of this cooperation was exhibited in all campus personnel participating in the identification of needs through the *Building Fund Raising Bridges* program.
Unit Goal #3

Implement a comprehensive internal and external communication plan designed to promote a positive image of Delta State University alumni-foundation activities.

Institutional Goal

See #13, #19, and #21 of the University Goals attachment.

Expected Results

Provide quality publications through which alumni and friends gain awareness and have opportunities to develop a “sense of ownership” in the University. Such publications are to include:

A) The Delta Currents alumni magazine, which is published and forwarded to alumni and friends twice a year;

B) The DSU Foundation Annual Report, which is forwarded to all participating donors annually; and

C) Special project publications and departmental newsletters, which are forwarded to target populations at select times during the year.

Assessment Procedures

All publications are designed to encourage positive/negative feedback regarding university activities.

Responses to special project and departmental mail-outs are documented and evaluated as to effectiveness.

Professional assistance is contracted to ensure that all publications are quality products and representative of the University.

Actual Results

Documented responses from alumni and friends indicate that publications forwarded in 1999 were well received and helped to enhance the image of the University.

Increases in membership and donor participation indicate that 1999 publications and materials had a positive impact in all phases of alumni-foundation activity.

Use of Results

The alumni-foundation staff utilizes the results of evaluation efforts and the recommendations of the publication committee, alumni services committee, and professional critique to provide change and enhancement for future publications.
Unit Goal #4

Design, implement, fully utilize, and accurately maintain a complete alumni and foundation management information system.

Institutional Goal

See #17, #18, #19, and #21 of the University Goals attachment.

Expected Results

Administrative and clerical staff will better be able to serve the alumni and friends of the University.

Organizational goals will be more easily attained, including (a) creation and maintenance of an alumni-foundation web page, (b) maintenance of an efficient and automated finance and accounting system, and (c) maintaining an up-to-date listing of alumni and foundation records.

Assessment Procedures

The administrative staff for alumni-foundation enlists the services of the DSU Information and Technology staff in ensuring implementation of applicable management system modules.

Applicable facets of the alumni-foundation management information system are subject to periodic (daily, weekly, monthly, quarterly, annual) reconciliation procedures by the administrative staff.

Actual Results

Results of annual audits by a board-approved outside CPA firm provide confirmation of the accuracy of the alumni-foundation financial and accounting records.

Statistics reveal that continued progress is being made in providing and maintaining automated records of alumni data and donor information.

Use of Results

Establishment and maintenance of available modules continue to enhance the use of electronic communication opportunities for alumni and friends of the University.
Unit Goal #5

*Build a strong relationship between the University and her alumni and friends through innovative and appealing programs.*

Institutional Goal

See #7, #9, #16, #18, #19, #20 and #21 of the University Goals attachment.

Expected Results

Alumni and friends will develop a sense of pride and ownership in “their” University and increase interest and participation in university-sponsored activities.

Alumni and friends will become active partners in the recruiting of prospective students for the University.

Alumni and friends, realizing that DSU are well educated, will be encouraged to “hire” and/or assist graduates in gaining employment.

Assessment Procedures

Monitor participation by alumni and friends in university-sponsored activities (homecoming, pig pickin, performing arts events, reunions, etc.).

The Alumni-Foundation Department will work closely with the offices of Recruiting and Career Services/Placement to include alumni and friends in assisting with their respective missions.

Actual Results

There is statistical evidence reveals that attendance at university-sponsored activities in 1999 increased significantly.

Feedback from constituents continues to be positive regarding administrative leadership, fiscal responsibility, and educational quality exhibited by the University.

The record of success attained by the DSU athletics teams in 1999 helped to stimulate continued excitement and pride among alumni and friends of the University.

Use of Results

The existence of quality programs and outstanding graduates provides the alumni-foundation office opportunities to continue to build an active alumni base and to better solicit private support for the University.
Unit Goal #6

Maintain a professional operating environment that will ensure an effective and efficient alumni-foundation staff and upgrade facilities to keep pace with organizational growth.

Institutional Goal

See #14, #15 and #16 of the University Goals attachment.

Expected Results

An active continuing education program will be made available to assist and educate all staff members, thereby helping to ensure an effective and qualified office staff.

A priority will be to provide administrative and clerical staff with needed equipment and opportunity to be productive.

Assessment Procedures

The Alumni and Foundation committee structure will evaluate and propose personnel needs as well upgrading and expanding facilities to meet organizational growth.

An annual performance review of administrative and clerical staff will be conducted.

Staff is encouraged to actively participate in office evaluation and the identification of “needs” and “ways” to achieve optimum effectiveness and efficiency.

Actual Results

All current members of the alumni-foundation staff are considered to be highly qualified for their respective positions.

Better use of staff time and productively has been enhanced as a result of staff participation in the evaluation of organizational policies and procedures.

Use of Results

Staff participation in continuing education and internal cross-training programs continue to ensure full utilization of computer module capability.

Attention continues to be given to upgrading and providing needed equipment in order to enhance productivity and ensure optimum networking efforts.
University Goals

Delta State University strives to fulfill the following goals:

**The Curriculum**

1. Define the general education requirements so that students acquire the basic skills, knowledge, and competencies necessary for a successful career, responsible citizenship, cultural awareness, and a respect for the worth and dignity of each human being.

2. Provide opportunities throughout the curriculum for students to further develop their skills in writing and in critical thinking.

3. Improve computer literacy for all students by making computer services available and by facilitating the use of appropriate software packages in courses throughout the curriculum.

4. Provide a curriculum that ensures that majors are properly prepared in their chosen fields to complete licensure requirements, enter the work force, and continue advanced study in graduate or professional school.

5. Enhance educational experiences at all levels by providing student internships and other career development opportunities and by encouraging student research and other creative work.

6. Maintain a strong graduate program that provides opportunities for advanced study and research in selected fields.

7. Establish and maintain performance standards in all areas, with regular assessment of all programs, using indicators such as examination results, achievements of graduates, student and alumni opinion, and professional peer review.

**The Students**

8. Recruit students who can meet performance standards and contribute to the academic excellence of the University.

9. Increase student retention by providing a support program with the following attributes: a comprehensive system of advising and other services to enhance student development, increased financial support of students through scholarships, assistantships, grants and loans; a development studies program for under-prepared students in mathematics, English, reading, and study skills; opportunities to meet or communicate with prospective employers or admission personnel from graduate or professional school.

10. Enhance the development of the total person by providing opportunities for students to engage, both as participants and spectators, in a wide variety of cultural, athletic, and other extra-curricula activities.
The Faculty

11. Attract and maintain a highly qualified and creative faculty skilled in teaching, service, research, and other scholarly activity.

12. Provide sufficient faculty in all disciplines to maintain a student-teacher ratio that ensures opportunities for meaningful intellectual interaction between students and faculty.

13. Strengthen the faculty in their pursuit of scholarship in teaching, service, and research through a comprehensive program of faculty development and renewal, including appropriate support services, resources, and personnel.

The Environment

14. Maintain a climate of involvement in which faculty, staff, students, and administrators work together to provide the optimal environment for living and learning.

15. Provide the resources and assistance to support the disciplines, including modern instructional equipment, a strong library and media center, computer facilities, and other services required for instruction, research, and public service.

16. Provide the facilities and the physical environment which contribute to the intellectual, cultural, moral, physical, and social growth and development of the student and of the surrounding community.

17. Provide administrative services and auxiliary enterprises (student housing, bookstore, food services, etc.) which are effective and efficient in the support of the institutional mission.

18. Expand the pursuit of external funding for instruction, research, student financial aid, and other needs.

19. Increase the involvement of alumni in the life and support of the University.

20. Accommodate non-traditional students and the general public by offering a comprehensive program of continuing education, including off-campus classes, independent-study courses by correspondence, non-credit courses, conferences, and workshops.

21. Strengthen the cooperative relationships with business and industry, service organizations, and other institutions.
Unit Budget Plan
FY 2000-2001 Budget

It is understood that the 2000-2001 budget is to be considered a
"level" year; therefore the Alumni and Foundation Department asked that
the 2000-2001 Budget "mirror" the requests made for the prior (1999-2000)
fiscal year.

Priority Budgetary Need

If there were to be recurring monies available, my priority request
would be that the salaries for clerical personnel be addressed. Clerical
personnel in the Alumni-Foundation area are required to achieve an
advanced level of computer literacy within applicable BANNER modules.
While the current staff is relatively proficient and has progressed in this area,
efforts to hire replacement personnel both now and in the future require a
higher salary than is currently available. An example of this is illustrated by
the fact that the department's Development Secretary's position has been
vacant since December, 1999. Three candidates, considered to be qualified,
have declined the position because of insufficient salary.

Attention should definitely be given to this need in order to maintain a
workforce of "quality" personnel in the clerical positions.

Other Priority Needs

A timeline should be developed for a "make-over" of the Hugh Ellis
Walker Alumni-Foundation House. It is requested that appropriate
university personnel inspect the facility, both inside and outside, to
formulate plans for future repair and renovation of needed maintenance.

I realize this is an area of consideration outside the budget request but
I definitely feel university representatives consider the appearance of this
facility to be a priority, especially with the numbers of alumni and friends
that utilize and/or visit on a daily basis.

Thank you for your consideration of the above priority needs!
### Community Relations

**Activity**: Activity not budgeted

**Location**: Location not budgeted

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2000-2001 Alumni-Foundation
Strategic Planning Process

- Goals three to five year goals approved by the Boards of Directors
- Objectives multi-year (1,3,5) activities recommended by committee structure
- Strategies annual activities developed by the staff to accomplish objectives

GOALS

The following goals serve as a blueprint for the DSU Alumni Association and the DSU Foundation, Inc. It is through the attainment of these goals that the Association and the Foundation have the opportunity to proactively establish controls that will ensure that alumni-foundation activities contribute to the long-range mission and goals of the University.

Membership/Donor Development

Sustain a sound financial operation through a strong membership/donor program and other sources of support.

Development Program

Develop a comprehensive giving program designed to benefit all aspects of the University.

Communications

Implement a comprehensive internal and external communication plan designed to promote a positive image of Delta State University alumni and foundation activities.

Information and Records Management

Design, implement, fully utilize, and accurately maintain a complete alumni and foundation management information system.

Program Development

Build a strong relationship between the University and her alumni and friends through innovative and appealing programs.

Staff and Facilities

Maintain a professional operating environment that will ensure an effective and efficient alumni-foundation staff and upgrade facilities and equipment to keep pace with organizational growth.
University Goals for 2000-2001

A. Establish an enrollment management program
B. Develop a university relations and marketing program
C. Provide support for faculty to seek research grants and contracts
D. Strengthen professional development programs for faculty and staff
E. Improve the use of instructional technologies
F. Develop the university’s web sites
G. Develop strategic plans for the Greenville and Clarksdale sites
H. Refine and coordinate more effectively community and economic development activities
I. Support interdisciplinary centers that contribute to our regional mission
J. Beautify the campus
K. Strengthen the university’s honors program
L. Review academic programs for currency in curriculum, pedagogy, instructional technology use and mission-relatedness
M. Seek ways to improve housing options for faculty and staff
N. Assess continuing education and distance learning opportunities
O. Strengthen experiential learning activities
P. Improve the university’s ability to be a diverse community
Q. Pursue federal and private funding
R. Seek ways to enhance student life on campus