LOYOLA UNIVERSITY NEW ORLEANS
COMMITTEE ON INSTITUTIONAL ADVANCEMENT FOR THE BOARD OF TRUSTEES
Thursday, October 4, 2012
1:00 p.m.
Thomas Hall, 3rd Floor Conference Room

AGENDA

1. Welcoming Remarks  Derby Gisclair

2. Approval of Minutes  Derby Gisclair

3. Advancement Report  Bill Bishop
   - FY 2012 recap
     - Unrestricted giving
     - Update on the Annual Fund
     - Alumni participation
     - Trusteeship giving
     - 2013 U.S. News & World Report’s Best Colleges rankings
   - Campaign Update
     - Draft campaign reports
     - Review of select cases for support
     - Role of the Alumni Association in the public phase
       of the campaign
     - December 2012 meeting of the Board of Trustees –
       May 2011 resolution
   - Centennial Update
     - Centennial on the Road
     - Presidential Centennial Guest Series
   - Update on BOR potential revisions to the Endowed
     Professorship Program

5. Old Business  Bill Bishop

6. Executive Session  Derby Gisclair

7. Adjournment  Derby Gisclair
LOYOLA UNIVERSITY NEW ORLEANS
COMMITTEE ON INSTITUTIONAL ADVANCEMENT FOR THE BOARD OF TRUSTEES

MINUTES

May 17, 2012

Present: Virginia Angelico-Tatum
          John J. Finan, Jr.
          Anne Gauthier, Vice Chair
          Robert Gerlich, S.J.
          S. Derby Gisclair, Chair
          Sean O’Keefe
          Robert A. “Bobby” Savoie
          Kevin Wm. Wildes, S.J., President (ex officio) – attended part of the meeting

Staff: Bill Bishop, Vice President
       Terry Fisher, AVP for Marketing
       Monique Gardner, Director for Alumni Relations
       Chris Wiseman, AVP for Development
       Rhonda E. Brehm, Recording Secretary

Guest: Dr. Sonya Duhe representing Dr. J. Cathy Rogers, Faculty Senate (ex officio)

Absent: Carolyn Callahan
        David M. Ferris
        Kevin Quinn, S.J.
        N. John Simmons, Jr.
        J. Kevin Poorman, Chair (ex officio)
        Ralph A. Litolff, Jr., Alumni Association (ex officio)

1. Welcome

   Derby Gisclair opened the meeting at 1:12 p.m. and invited Fr. Gerlich to open with a prayer.

2. Approval of Minutes

   Mr. Gisclair asked if there was a motion to approve the minutes of the March 8, 2012, meeting. MOTION was made by Sean O’Keefe and seconded by John Finan. Motion carried.
3. **Approval of endowed professorships and scholarship**

- The Clinton A. Morvant Distinguished Professorship in Business
- The Coach James “Big Jim” McCafferty Endowed Scholarship for First Generation Students

Mr. Gisclair asked for a motion to approve The Clinton A. Morvant Distinguished Professorship in Business and The Coach James “Big Jim” McCafferty Endowed Scholarship for First Generation Students. **MOTION** was made by Mr. O’Keefe and seconded by Mr. Finan. Motion carried.

4. **Update on BOR Revisions to Endowed Professorships Program**

Bill Bishop offered the following update:

- At this time, scholarships are not affected by the BOR changes – professorships only. The scholarship fund is safe now, but this may change.
- Until the BOR can sort out how it can keep its commitments under the endowed professorship program, there will be no new applications for matching funds after June 30, 2012.
- Currently, the BOR needs approximately $8.8M to fund the number of professorships in queue (more than 200). Loyola currently has five professorships in the queue for matching dollars.

Discussion concerning donors of gifts in queue for matching dollars:

- We have an obligation to our donors. Gifts were made in good faith.
- If the state does not make the match, do we need to return the gift to the donor?
- Let donors know what is happening – this is the situation.
- Get guidance on what the donor would like us to do.
- In the Gift Policy:
  - Change minimum for a professorship to $100,000 philanthropic contribution and $2M philanthropic contribution for an endowed chair.

Mr. Bishop and Chris Wiseman are working with Tommy Screen, the Director of Government Relations for the University. Mr. Screen is monitoring the activities and in conversation with the BOR on behalf of the University and is also working with the Louisiana Association of Independent Colleges and Universities.

5. **Approval of new policy: Loyola University Naming Policy**

Mr. Bishop introduced the policy and stated that it was necessary as we enter into the comprehensive fundraising campaign. He also noted that some minor changes had been made
to the draft provided in the board book and distributed the updated version dated **May 17, 2012.** (If approved by the Committee, this is the version to be voted on by the full Board.) The Naming Policy will be reviewed after the first year for revisions and every three years thereafter. Mr. Bishop noted that the policy:

- Establishes an internal Named Gifts Program Committee. This committee will be chaired by the vice president for Institutional Advancement and representatives throughout campus will complete the committee.
- Allows the president of the University authority to approve naming opportunities for gifts under $5M. The president will confer with the Board of Trustees for gifts of $5M or greater.
- Increases the philanthropic amount needed to establish named professorships and chairs.
- Addresses corporate naming and name removal.

Mr. Gisclair asked for a motion to approve The Naming Policy. **MOTION** was made by Mr. O’Keefe and seconded by Anne Gauthier. Motion carried.

6. **Approval of revised policy: Loyola University Gift and Pledge Policies and Procedures**

Mr. Bishop stated that the current revised policy was approved by the Board on March 18, 2011. He added that revisions were necessary as we enter into the comprehensive fundraising campaign. Major revisions to the policy:

- Gifts of real estate.
- Deferred gifts.
- Gifts we won’t accept.
- How gifts will be “counted” in fundraising campaigns.

Mr. Gisclair asked for a motion to approve the revised Gift and Pledge Policies and Procedures. **MOTION** was made by Mr. O’Keefe and seconded by Anne Gauthier. Motion carried.

7. **Advancement Report**

Mr. Bishop proceeded with an update on the Office of Institutional Advancement. (A copy of the presentation is available via a link on the Board of Trustee website under the Institutional Advancement Committee section.) Some highlights from the presentation:

- Fundraising update (through April 30, 2012) – additional notes:
  - Budget Relief replaces dollars already budgeted.
  - Achieving the $20M goal for this fiscal year would bring us closer to where we need to be for the Board to vote for the University to enter the public phase of the campaign in December.
At this time, for this fiscal year there are $40M in solicitations “on the table”. (As a comparison: There was a total of $26M in solicitations over the last three years.)

Everybody on the IA team is engaged in raising dollars.

Campaign messaging and priorities:

- Thank you to all who have given us guidance.
- Still working on providing more specificity to university priorities:
  - There are four definite priorities: Scholarships, Jesuit Center, Programmatic, and Unrestricted/Budget Relief.
  - Proposed priorities:
    - For the Athletics program – a possible change in conference and division from NAIA to NCAA. This change will require a substantial investment.
    - Transforming the Broadway Campus into a more enhanced residential experience.
  - There is an increased cost to renovate Monroe Hall.
  - $55M-$60M Bricks and Mortar – Question the ability of the community to support all of these projects.
- Donors will drive where the money goes.
- OIA is engaging the 28 chapters of the Alumni Association and asking their assistance in raising unrestricted dollars. If Alumni chapters take ownership, it will go a long way also in engaging many alumni for the very first time. Question was asked how many chapters are aware of the campaign. Mr. Bishop responded:
  - His office is currently conducting campaign webinars with the chapter presidents to inform and educate them about the campaign. At this time, half of the alumni chapter presidents have participated in a campaign webinar. Chapter members will be apprised of the campaign once we enter the public phase.
  - There is a big push for individual presidents to give. This year there has been 100% participation.
  - Someone now makes an “ask” at every Alumni event.
  - New York, D.C., and Chicago are active chapters. This Fall, the Alumni Office will take a program called Centennial on the Road to each of these cities. This program brings our Centennial celebration to our alums and includes: Fr. Wildes or his representative, Bernie Cook (brief talk about the book), music provided by local alumni, the Centennial video, and the travelling Centennial exhibit (provided by the Library).
  - We are doing more with our non-active chapters, and if Centennial on the Road is successful, we will bring the program to more chapters in Spring 2013.
• Alumni participation rates (through April 30, 2012) – additional notes:
  o This year, we have established specific criteria (metrics) for counting alumni going forward.
  o We have to find a way to contact alums in order to count them.
  o Alumni participation is important to our reputation – ranking in USNWR.
  o CASE uses different metrics.
  o Robert LeBlanc is working with the OIA to engage young alumni through social media.
  o Mr. Gisclair is working with OIA and other university staff regarding the use of a QR Code (barcode) at no cost to us. It could be used to facilitate the acquisition of student contact information once a student graduates.
  o Working on smaller, more segmented approaches to alumni solicitation (i.e., by college).
  o Chris Wiseman is working with staff of Alumni Relations to help us engage alumni.
  o One challenge is our on-line program graduates – how best to reach them.
  o Other suggestions:
    ▪ Work with law alums: we know how to reach them; show numbers to them; they can afford to give.
    ▪ Start introducing students to the idea of philanthropy.

• Draft Campaign Reports were distributed to the Committee:

**Take-away:**
Committee members were asked to review the charts with the following questions in mind: What type of campaign reports do you want to see? Is there additional information that might be helpful? The draft reports will be discussed further at the October meeting.

• Centennial – Some statistics on the 2012 Alumni College were provided by Monique Gardner:
  o College is one month away.
  o 37 people are registered (20 are local).
  o 4 people have registered to stay in the dorm.
  o Field trip registrations: 7 for National World War II Museum tour; 15 for post-Katrina bus tour; and 6 for Sculpture Garden tour.
  o Track registrations: 13 for New Orleans and the World; 5 for Art and Culture; 3 for Loyola and the Jesuit Mission; 7 for Politics and Society; and 9 floaters.

8. **Old Business**

There was no old business.
9. **Executive Session**

There was no executive session.

10. **Adjournment**

The meeting was adjourned at 2:24 p.m.
VICE PRESIDENT’S OVERVIEW

The missions of the Office of Institutional Advancement are to develop understanding and support among the university’s various constituencies in order to secure the resources required to fulfill Loyola’s educational mission and to provide integrated marketing communications to support the university’s strategic goal of achieving national recognition as one of the leading master-level comprehensive universities in the nation.

My office strives to achieve these goals through a rigorous fund development, stewardship, and alumni and parent relations program as well as the implementation of a university-wide marketing communications program focusing on consistent messages and identity, public affairs, publications, advertising, and web online communication.

Included in your board book are reports from the leaders of the major offices within the Office of Institutional Advancement. Their reports highlight and provide the basis for the update I will provide to the board’s Advancement Committee on the office’s activities during FY 2012 and its plans for FY 2013.

There are no action items on the agenda for the October meeting of the Committee. We do, however, have a full agenda. I’ll provide the members of the Advancement Committee with an update on the status of our comprehensive fundraising campaign. While we will discuss some of the campaign’s specific priorities, I do wish to focus a significant part of our committee discussion on the topics of unrestricted giving, Loyola’s annual fund campaign, and the importance of trustee philanthropic support to the success of the university’s fund raising endeavors. We’ll also discuss the forthcoming activities associated with the university’s Centennial celebrations. And, finally, I’ll bring you up to date on recent developments affecting the Board of Regents Support Fund’s Endowed Professorships program.

Prior to turning your attention to the reports from my team leaders, please note that the Office of Institutional Advancement will focus its activities for AY 12-13 on the following:

1. Supporting the President’s overarching strategies as expressed in Loyola 2012.
2. Executing the Leadership Phase of the Faith in the Future campaign and recommending to the Board of Trustees at its December 2012 board meeting (a) the date for the launch
of the public phase of the campaign; (b) the announced public goal of the campaign; and (c) the estimated completion date of the campaign.

3. Improving the return on the resources invested into the Office of Advancement. Securing $1,000,000 in unrestricted annual gift support and an additional $900,000 in unrestricted gifts or budget relief dollars. Achieving an undergraduate degree holder alumni participation rate of approximately 12%.

4. Executing, along with other members of the university team, the remaining celebrations of Loyola’s year-long Centennial celebrations, including preparation for the public launch of the Faith in the Future campaign.

5. Continuing to engage Loyola University New Orleans community neighbors to ensure that Phase II of the university’s master plan is implemented as smoothly as possible.

6. Concluding year 2 of the university’s Culture of Philanthropy project with a determination of an agreed to assessment tool which highlights “Culture of Philanthropy” routines.

7. And developing an initial assessment from the Office of Institutional Advancement perspective of the impact of a possible move of Loyola’s intercollegiate athletic programs into either NCAA Division II or III, with appropriate recommendations based on this assessment.

I look forward to seeing you at the forthcoming meeting of the Board of Trustees.

**DEVELOPMENT – Chris Wiseman**

Loyola University New Orleans seeks support from alumni, parents, friends, private foundations, corporations, and other organizations to meet the university’s philanthropic priorities.

The Office of Development (major gifts, annual giving, stewardship, and grants) in Loyola’s Office of Institutional Advancement is charged with the task of raising funds for the university from private sources. Loyola’s fundraising priorities are determined by the president, the Board of Trustees, the provost, and the vice president of Institutional Advancement.

**Key Accomplishments and Challenges since the May 2012 meeting of the Institutional Advancement Committee of the Board of Trustees:**

- Fundraising results for fiscal year 2012 included some notable successes even as we fell short of a very ambitious “stretch” goal for new gifts and pledges. Thanks to a great effort by alumni volunteers, spurred on by the Annual Giving and Development staff, the percentage of Loyola undergraduate alumni who gave to the university in 2011-12 rose to
10 percent, a 25 percent increase over the previous year’s figure of 8 percent. This is notable progress toward the key Faith in the Future goal of 20 percent undergraduate alumni giving by 2017. In addition, we exceeded our goal of $1,845,000 in unrestricted and budget relief gifts by raising $1,981,946 in these categories. We fell short of a very ambitious goal of $20,000,000 in new gifts and pledges toward the Faith in the Future campaign goal; Loyola garnered $6,550,336 in this category. However, total gifts and pledges were $9,622,895. Overall, we have raised approximately $20,000,000 toward the Faith in the Future goal of $100,000,000.

- Current, emeriti, and former trustees continue their serious discussions regarding their initial campaign gifts. All are 6- and 7-figure gifts. The president and Development staff solicited a $20,000,000 gift in late spring; the discussion went well, and the president is meeting with this prospective donor again in the fall to continue the discussion. Overall, Loyola’s leadership, volunteers, and staff have been demonstrably more aggressive about major gift solicitation over the past year, with discussions driven by Loyola’s clearly determined and stated fundraising priorities. In sum, Loyola’s leadership and Development staff solicited over $50,000,000 in major gifts in fiscal year 2012, a total higher than the previous four years totals combined. This activity bodes well for future fundraising totals, if prospective donors respond favorably to our requests. In short, because we have been asking more people and institutions for more and larger gifts over the past two years, we expect to receive more gifts totaling a greater number of dollars.

- We hired new staff members to replace staff members who had departed in Annual Giving. Stephanie Hotard assumed the leadership role of director in July, and Allison Hotard was hired as an assistant director in August. We also rewrote job descriptions so that our staff’s work will be more in line with the ambitious goals of the Faith in the Future campaign. Staff time will be focused more on our undergraduate alumni participation rate, with greater time spent on engaging volunteers systematically in Loyola’s fundraising efforts. We look forward to an even better partnership with staff in Alumni Relations, as that office just hired a new staff member, Sarah Gelfand, whose primary focus will be alumni engagement and reunion giving—the latter of which is a proven means of improving alumni participation in annual giving.

- Under the direction of Dr. Claire Simno, our Stewardship and Donor Relations efforts took a big step forward in FY2012 with the implementation of formal, professionally produced scholarship endowment reports for Loyola’s scholarship donors. We also reviewed the way Loyola honors benefactors and friends at the annual Benefactors Dinner, and with Fr. Wildes’ participation have re-branded the dinner as the “1912 Society Dinner,” in order to reflect better the varied purposes of the dinner and to honor Loyola’s founding year going forward, in this, our Centennial year.

- Annual Giving and Alumni Relations staff members continued to use our “Share Your Memories” interview questions as a way of using the Centennial to engage alumni during individual meetings. This program also proved to be a way for our phonathon students to engage with alumni during telephone calls.
• Upcoming areas of focus include: working with trustees to ascertain their specific philanthropic commitments to the campaign; organizing the next levels of volunteer leadership for the campaign, including the Executive Committee and some of the priority project-based committees; and, where and when appropriate, soliciting campaign gifts from our “Top 100” identified prospective campaign benefactors.

**ALUMNI RELATIONS – Monique Gardner**

The Office of Alumni Relations is dedicated to supporting Loyola University New Orleans through programs, benefits, services, and communications designed, developed, and implemented to create and enhance lasting and mutually beneficial relationships between the University and members of its Alumni Association. Recognizing that our greatest assets are our graduates, the members of the Alumni Association, the Office of Alumni Relations works to develop a membership of committed, trained volunteers who enjoy their post-graduate experience, are proud to be Alumni Association members, and believe that their volunteer time is used efficiently and effectively. Our staff also works closely with Development staff in order to help realize the University’s fundraising goals each year.

The FY2013 Goals for Institutional Advancement are supported by the Office of Alumni Relations through the following action plans:

1. Continue to work to support the overarching strategies of Loyola 2012 by working with the Office of Development to increase the number of alumni donors and the dollars raised from alumni and working closely with the Vice President of Mission & Ministry (M&M) to enhance Jesuit values.
2. Assist in the execution of the Leadership Phase of the Faith in the Future and recommend to the Board of Trustees at its December 2012 board meeting (a) the date for the launch of the public phase of the campaign; (b) the announced public goal of the campaign; and (c) the estimated completion date of the campaign. Alumni Relations will work with Development and Annual Giving to develop the plan for the “20/10 by 2017 Campaign,” that part of the campaign that includes the undergraduate degree holder alumni participation rate of 20% and the $10,000,000 unrestricted annual gift support by 2017.
3. Continue to improve the return on the resources invested into the Office of Advancement. Secure $1,000,000 in unrestricted annual gift support and an additional $900,000 in unrestricted gifts or budget relief dollars. Achieve an undergraduate degree holder alumni participation rate of approximately 12%.
4. Execute, along with other members of the university team, the remaining celebrations of Loyola’s year-long Centennial celebrations, including preparation for the public launch of the Faith in the Future campaign.
5. Alumni Relations will work with the Office of Marketing & Communications to engage Loyola University New Orleans community neighbors to ensure that Phase II of the master plan is implemented as smoothly as possible.
6. Evaluate and identify additional alumni resources required in support of potential Athletics Conference division change and prepare an assessment based on research and interviews no later than Nov. 1, 2012.

Goal 1: Continue to work to support the overarching strategies of Loyola 2012.

Enhance Online Giving
We are working with Marketing & Communications, Development, and Advancement Records to build new Alumni Association and Annual Giving websites that will promote and encourage online giving.

Alumni Board Participation and Volunteer Training
Over the summer, the Young Alumni Pack sponsored the 100 Days of Giving Social Media Campaign. Each Young Alumni Pack board member was responsible for actively recruiting ten (10) of their friends to make a contribution to the Loyola Fund. In addition, each Young Alumni Pack board member has agreed to actively promote the daily “reason to give” during each of the 100 days of the campaign. They brought in 202 new gifts and raised approximately $9,000.

The Office of Alumni Relations conducted a Joint Board of Directors Orientation meeting on September 8 and introduced our initiatives for the year to members of our four boards. The initiatives are as follows:

- Loyola Loyal Volunteers
- Good Will Ambassadors
- Presence at Alumni Weekend and Alumni College
- Leadership Presence at Centennial Events

Although we will strive for 100% board participation in the Loyola Fund, our goal this year is to better train our volunteers so that they are more prepared and have the necessary tools to reach out to friends and colleagues on behalf of annual giving.

Visits and Donor Pipeline
We continue to assist the annual giving and development staffs in building a prospective donor pipeline by passing along names of alumni, parents, and friends of the university. We visit, as defined by the Development Office, with alumni, parents or friends to qualify or solicit for the Loyola Fund.

Improve our Performance Metrics
We are working to increase the number of alumni, parents, and friends who volunteer and/or attend alumni events who give, from 37% (563/1514 in FY11) and 41.5% (873/2105 in FY12) to 50% in FY13.
We use three variables—volunteer hours, event attendance, and annual giving—to measure staff performance in increasing alumni involvement.

<table>
<thead>
<tr>
<th></th>
<th>FY11</th>
<th>FY12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total who volunteered, gave, or attended an event</td>
<td>5737</td>
<td>5833</td>
</tr>
<tr>
<td>- Total who attended at least one event</td>
<td>1514</td>
<td>2105</td>
</tr>
<tr>
<td>- Percentage of event attendees who gave</td>
<td>37%</td>
<td>41.5%</td>
</tr>
<tr>
<td>- Total volunteer hours</td>
<td>3175</td>
<td>5401</td>
</tr>
<tr>
<td>- Total number of volunteers</td>
<td>326</td>
<td>507</td>
</tr>
<tr>
<td>- Percentage of volunteers who gave</td>
<td>61%</td>
<td>57.2%</td>
</tr>
<tr>
<td>- Percentage of who gave but did not volunteer/attend event</td>
<td>83.6%</td>
<td>75%</td>
</tr>
</tbody>
</table>

**Increase Reunion Giving**

We have hired an Assistant Director for Campaign who will develop a three to five year strategic plan for increasing Reunion Giving and will be responsible for executing the plan. A large component of the plan will include the necessary training for committee volunteers.

**Develop New Programming for Affinity Groups**

We continue to grow the monthly volunteer group, the Golden Stars. We are mailing out a postcard invitation this fall and targeting our older alumni. Future plans include an All-Alumni-Athletic Reunion, a Valentine’s event for our alumni couples, and a Student Government Presidents Reunion.

**Jesuit Mission**

We are also working with Mission & Ministry to offer an Ignatian Pilgrimage to Spain in June 2013. It will be a joint trip offered to Loyola and Spring Hill graduates.

We have already identified and begun meeting with the 2012 Wolves on the Prowl National Service Day (“WOTP”) committee chairs. The date for 2012 WOTP will take place on Saturday, October 20 and planning began in late April. The Committee chairs have established the goal of DOUBLING alumni participation in WOTP in 2012 from approximately 130 to 260 participants.

The Northshore Chapter hosted a lecture with Fr. Gregg Grovenburg followed by dinner on Sunday, July 29 in celebration of the Feast Day of St. Ignatius.

**Goal 2:** Assist in the execution of the Leadership Phase and develop plans for the Public Phase of the *Faith in the Future* campaign.

**Loyola Loyal Committee**

We are working with the Office of Development to plan for the public phase of the campaign. We are working within the volunteer structure of the Alumni Association to develop a Loyola
Loyal Committee that will be responsible for increasing alumni participation. Some initial job descriptions have been created.

**Goal 3: Continue to improve the return on the resources invested into the Office of Advancement.**

**Maximize Alumni Events**
The Office of Alumni Relations continues to work with the Office of Development to maximize alumni events for greater impact. We have identified new ways to provide support to our regional chapters through creating position descriptions for volunteer opportunities in existing regional chapters, and we are streamlining the event planning procedures to ensure maximum efficiency while increasing attention to detail. Since last report, we hosted the Annual Senior Crawfish Boil, the Golden Wolves Induction Ceremony and Luncheon, the 2012 Alumni College, 13 chapter crawfish boils, 3 freshmen send-offs, an Ignatian Spirituality Dinner on the Northshore, two Chapter Happy Hours and two local networking events, a nursing lecture, two chapter sporting events, and an Athletic Department fundraiser. When appropriate, we continue to provide the Annual Giving message at alumni events.

We extend a special thank you to Kevin and Jeanne Poorman. The Chicago Chapter invited the newest members of the Loyola community and their families to join them at the Chicago Summer Send-Off BBQ on Sunday, July 29, 2012. The event, which was graciously hosted by the Poormans, allowed the incoming students to connect with alumni and current students. This send off had one of the largest crowds ever—nearly 80 guests.

**Social Media**
Facebook- We continue to post St. Ignatius quotes in the morning and alumni success stories, event photos, and information about upcoming events in the afternoon.

LinkedIn- This is used mostly for networking and employment opportunities. Our new goal is to raise the number of followers from 2586 to 3200 in FY13.

**Goal 4: Execute, along with other members of the university team, the remaining celebrations of Loyola’s year-long Centennial celebrations.**

**Alumni College**
Since last report, we hosted the Inaugural Alumni College: Experience Loyola Again! A volunteer committee made up of faculty, staff, and alumni planned a three-day weekend in June where alumni, spouses, family, and friends were invited to attend classes taught by Loyola’s outstanding faculty. Other features included faculty led tours to the Sculpture Garden at NOMA and the National WWII Museum, a special Friday Night Dinner at Arnaud’s Restaurant, and a Faculty Concert on Saturday.
When participants were not in class, they had the opportunity to mingle at meals and social events with fellow participants, Loyola faculty and administrators. The classes offered were grouped into tracks or themes that helped to identify topics of particular interest. There were four tracks, six classes per track, and a joint session on Sunday, following Mass. A small number of rooms in one of Loyola’s residence halls were available.

The event was well received by faculty and participants alike. We had 68 participants and hope to increase the numbers in 2013. Initial plans have begun for the event in 2013, and the dates have been confirmed: June 7-9.

**Regional Centennial Celebrations**

The Office of Alumni Relations is planning a series of events in our major chapter cities to capitalize on the excitement of the Centennial to inspire alumni, donors and prospective donors with a desire to engage with and support Loyola University New Orleans as we enter a second century with the *Faith in the Future* campaign. At these events, university leadership, faculty, and staff will celebrate Loyola’s past and present a stirring vision of Loyola as it stands today looking to the future — unified around strategic priorities and projects that will make possible our further success in Jesuit higher education in the 21st century. A successful slate of events will result in new campaign volunteers and donors, as well as well-informed and excited donors who have already given to the campaign.

A host committee has been identified to help support each event. The host committee members are responsible for encouraging others to attend the event. Members of the host committee are recognized on the formal invitation and the website. The program for each event is similar and includes a presentation by Dr. Bernard Cook, author of *Founded on Faith: A History of Loyola University New Orleans*, a screening of The Loyola Centennial Documentary, a musical or vocal performance by alumni or faculty, and remarks by Fr. Kevin Wildes or another senior university leader. Staff at the Monroe Library has also assisted in the creation of a traveling Centennial exhibit to be displayed during the Regional Centennial Celebrations.

In Fall 2012, there will be three Regional Centennial Celebrations: Washington, D.C., New York, and Chicago. If well received, we will have Regional Centennial Celebrations in Texas, Los Angeles, Miami, and Atlanta, beginning in the spring of 2013.

- Saturday, October 13, 2012—The *Cherry Blossom Riverboat*, Old Town Alexandria
- Saturday, November 3, 2012—The Lotos Club, New York City
- Saturday, November 17, 2012—The Library Club, Chicago

**ADVANCEMENT RECORDS — MARTHA BODKER**

During Fiscal Year 2012, the Department of Advancement Records’ goals focused on supporting the overarching strategies of Loyola 2012 of improving the University’s stature, enhancing our Jesuit values, and initiating the *Faith in the Future* Campaign.
To accomplish these goals our priorities have focused on: 1) Ensuring the health of the alumni/development database. 2) Obtaining data to help identify top campaign prospects. 3) Implementing structural changes to the database to improve processes, aid in reporting of campaign successes, and establish a campaign volunteer structure. 4) Providing support to all departments in their efforts to fundraise and communicate the university’s vision. Highlights of FY 2012 included:

- Submitted more than 35,000 records for contract research for updated address, phone, email and cell phone information for alumni records.
- To help identify top campaign prospects, we submitted more than 31,000 alumni records for contract research to obtain wealth and giving likelihood indicators.
- An Assistant Director was hired to assist in campaign reporting, assessment of database infrastructure, implement structural changes and overseeing technical upgrades.
- Assisted with the revision of the University’s gift acceptance policies.
- Worked with Development and the Office of Stewardship and Donor Relations to facilitate improved communications with the University’s top donors, ensure adherence to audit and industry guidelines for handling of all contributions to the University, improve handling of grants awarded by private foundations, and creating a stewardship plan for Loyola’s most loyal contributors.
- As a result of the assessment of two products being considered to improve data integration for online donations, event registrations and address updates, we determined that the University would move to a slimmed down online community which can be fully integrated with the database.
- Successfully planned, prepared and implemented the migration of all Institutional Advancement shared files to a new, secure site created by Information Technology.
- The 2 year document imaging project was completed with more than 5,500 historic donor, stewardship, planned giving and corporate/foundation files were scanned and attached to constituent records. A plan for disposition of scanned materials was prepared and implementation has begun.

During Fiscal Year 2013, a number of initiatives have been identified to continue laying the groundwork for the Faith in the Future Campaign and to support overarching strategies of Loyola 2012. These include:

- Implement departmental reorganization to include rewriting job descriptions to better define individual staff responsibilities as well as implement physical modifications to improve work efficiency.
- Implement migration to Blackbaud software selected for handling of online giving, event registrations and constituent biographic and demographic data integration.
- Continue to develop and refine campaign gift reporting structure.
- Work with Development to create a campaign volunteer structure within the database.
• Continue to work with Development staff to ensure all internal processes are in place to facilitate acceptance of alternative methods of receiving online gifts via mobile optimizations and other social networking media, ensure new gift acceptance policies passed by the Board of Trustees are implemented and incorporated in gift counting within Institutional Advancement.
• Create a working database committee representing all departments within Institutional Advancement to gather and prioritize implementation of database issues, formatting requests and offer cross-education opportunities to gain a better understanding of each department’s needs.
• Continue internal collaboration to improve workflow, maximize matching gift returns, and improve web presence.
• Revisit the traditional means of obtaining updated addresses as the batch look-up services used in the past have not proved to be as reliable due to the frequent moves which occur with alumni post-graduation.
• Offer increased opportunities for Advancement Records staff member’s professional development and educational needs to accomplish the above initiatives.

**MARKETING AND COMMUNICATIONS – TERRY FISHER**

The 2011 – 2012 Institutional Advancement’s goals were supported by Marketing & Communication through the following action plans, which additionally supported the university’s goals of Loyola 2012.

The major objectives of the Office of Marketing & Communications were to:

- Enhance our national reputation
- Engage alumni
- Assist Annual Giving with increasing alumni participation
- Execute a successful Campaign Communications Plan to assist Development’s fundraising efforts
- Publish a 100-year history book
- Coordinate and promote Centennial activities externally

An Overview of Marketing + Communications FY12 Achievements:

- Completed 3-year process of redesigning all major university websites by Fall 2011, including admissions, alumni, giving, and all college and division websites.
- Initiated a “100 Days of Giving” social media marketing campaign geared to increase alumni participation.
- Won numerous industry awards in local and national competitions.
- Web Communications worked for four months exclusively on initiatives related to the university’s SACS compliance, contributing 2,500+ staff hours to SACS web assistance to ensure a successful Five Year SACs accreditation review.
• Published seven alumni magazines; LOYNO magazine ranks highest valued of alumni communication methods.
• Developed and executed annual strategic marketing plan to enhance national reputation and US News Rankers’ awareness.
• Produced 18 major university events including Thomas Hall dedication, centennial kick-off events, and commencement.
• Completed Campaign branding, theme, operating draft, prospectus with assistance, along with internal campaign volunteer’s website.
• Produced two printed newsletters targeted to university neighbors focusing on construction improvements.
• Loyola website attracted 2.6 million unique visitors; garnered 12,382,479 total page views.
• Began implementation of the PrintSprokit online print template system for use by university constituents to produce their own publications that target internal audiences.
• Disseminated a survey to 16,288 alumni with 1,240 responding (7.6%). The data helps in understanding why and how alumni engage with the university as well as communication preferences.
• Provided strategic support and execution of Graduate Council, LIM, DNP, MBA, Law, Summer Session, Evening Division’s recruitment efforts including six strategic marketing campaigns.
• Created and executed comprehensive Centennial Marketing + Communications campaign plans including events, signage, media outreach, graphic branding, promotion, cultivation dinners, giveaways and obtained six sponsorships.
• Completed four year publishing project for Faith in the Future, first comprehensive Loyola history book.
• Produced a series of promotional videos, with topics ranging from service learning, economic impact, and alumni engagement.

**RECOGNITION BY INDUSTRY AWARDS 2011 – 2012**

**CASE AWARD OF EXCELLENCE (Best of)**
- Division/ Electronic Communication Social Media -Pack Places on official Facebook page
- Division/ Printed Publications: Tabloids and Newsletters "Neighborhood News"
- Division/ Total Graphic Identity -Student Affairs Branding and Identity Campaign - Lead The Pack
- Division/ Printed Publications; Annual Reports 2010 President’s Report/ Loyola at a Glance
- Division/ Electronic Communication- Chagas Disease Video Press Release

**2012 NEW ORLEANS ADDY AWARDS**
- Loyola University New Orleans Mobile Website (m.loyno.edu)
PUBLIC RELATIONS SOCIETY OF AMERICA 2011 AWARDS

AWARD OF EXCELLENCE (Best of)
- Division/Newsletters: Neighborhood News

CERTIFICATE OF MERIT
- Division/ Social Media: Loyola at a Glance e-newsletter
- Division/Video News Release: Chagas Disease Video Press Release

HIGHER EDUCATION MARKETING REPORT’S 27TH ANNUAL EDUCATIONAL ADVERTISING AWARDS
GOLD Magazine Advertising Series: US News Ad Series (3)
SILVER Imprinted Materials: Class of 2015 Beads
BRONZE Printed Newsletter: Neighborhood News
MERIT Newspaper Advertisement/Single Ad: Centennial Promotion

Office of Web Communications Overview

- Completed 1058 total projects in 2011-2012. (Completed 756 projects 2010-11)
- August 2011, completed design and architecture revisions to Loyola homepage (and corresponding landing pages) as a result of findings of Spring 2011 Usability Study.
- In Fall 2011, completed three-year process of re-designing and re-structuring all major university office, college, department, and major center and institute websites
- Created and launched Centennial website in support of university’s comprehensive Centennial Celebration
- Contributed 2,500+ staff hours to SACS web assistance to ensure a successful Five Year SACs accreditation
- Over 50,000 visits were referred by social media outlets (facebook, twitter, flickr, linkedin, youtube, vimeo, etc.)
- Implemented new online project management system, Atrium, to better track and manage our work

Website Metrics FY12 Annual Review
- 2011-2012, Loyola website attracted 2.6 million unique visitors; garnered 12,382,479 total page views.

Growth Analysis: We’ve gained a significant number of additional unique visitors year over year, 50.76% are new (have never visited the loyno.edu domain before). This indicates a rise in Loyola’s brand awareness.
- Unique Visitors: 15.11% Increase 2,614,293 vs 2,271,127
- Total Visits: -2.30% 5,001,126 vs 5,118,601
- % New Visits: 17.17% 50.76% vs 43.32%
SOCIAL MEDIA METRICS FY12 ANNUAL REVIEW

Growth – (Measures Loyola Facebook page growth during Aug. 1, 2011 – July 31, 2012, including the % increase over FY11)

- New Facebook Fans: 1,566 (+222%)
- Total Lifetime Facebook Fans: 6,964 (+29%)
- New Twitter Followers: 1,062 (+23%)
- Total Lifetime Twitter Followers: 3,136 (+63.9%)

Reach - (Measures how many people have seen Loyola Facebook page and posts during Aug. 1, 2011 – July 31, 2012, including the % increase over FY11)

- Page Views: 39,942 (+69.9%)
- Weekly Average Post Views: 529,925.4 (+138.5%)
- Average Total Replies & Retweets Reach: 644,371 (+173.9%)

Engagement – (Measures total Likes, Comments and Fan Posts to Loyola Facebook page and total Replies, Retweets and Mentions to Loyola’s Twitter during Aug. 1, 2011 – July 31, 2012, including the % increase over FY11)

- Total Facebook Interactions: 15,081 (+271.9%)
- Total Twitter Interactions: 3,116 (+97.5%)

OFFICE OF PUBLIC AFFAIRS OVERVIEW

8,995 news stories and/or press mentions (21.5% overall increase to date from 10-11)

- 1,323 – Louisiana media (5.5% increase from 10-11)
- 6,803 – U.S. media (22% increase from 10-11)
- 869 – International media (49% increase from 10-11)
- News releases distributed during 2011-12: 311

Top 5 national news stories:
- Loyola professors explore flying in new book, “Checking In-Checking Out”
- Business professors save class time with automated attendance tracker
- Loyola law professor discusses BP spill settlements
- Senate confirms Higginson for federal judgeship
- Does eating organic make you a jerk? Food and moral identities

Major Events Produced:
- Thomas Hall dedication
- Broadway Law Building/Law Clinic dedication
- Centennial Mardi Gras Parade Party – internal centennial roll-out (Feb)
- Centennial week events (April)
- Commencement 2012

**Office of Publications and Creative Services Overview**

- Instituted a holistic and strategic transition resulting in copy and content that reflects the goals of strategic plan *Loyola 2012* (all the while stressing Loyola’s unchanging Jesuit values), preparing our various audiences for the campaign’s launch.
- Produced and mailed our signature pieces (*US News* Rankers /Enhance National Reputation) strategic marketing plan) to campaign prospects and target alumni chapter cities to raise alumni awareness
- Strategic support and execution of Graduate Council, School of Nursing, LIM, DNP, MBA, Law, Summer Session, Evening Division’s recruitment efforts, including:
  a. Online paid search campaigns
  b. Developed + implemented Summer Session and Evening Division 2012 recruiting marketing plans.
  c. Developed and in process of implementing strategic marketing plans for the launch of two new Translation/Interpretation and Forensic Investigation Certificate Programs.

FY12 Completed Projects review - Total 689
Of the projects completed in FY12, 174 (30%) were in support of Institutional Advancement projects.

There were 120 projects in support of centennial, including:
- Logo Development and Brand Standards
- Stationery, envelopes, business cards, etc.
- Merchandise
- Invitations
- Print Ads
- On/Off Campus Signage

**National Reputation and Awareness Strategic Marketing Campaign**

Publications and Creative Services worked closely with faculty and staff, specifically in the Office of Service Learning, Center for International Education, and Academic Affairs, to write, direct photo shoots, design, and produce Signature pieces, which were mailed to the peer rankers on schedule and within budget in execution of the annual strategic marketing plan developed to enhance national reputation and *US News* Rankers’ awareness. These pieces highlight the achievements of the university, which in turn enhances Loyola’s reputation and stature, and are infused with language and descriptions that emphasize our Jesuit values.
- *USN&WR* Best Colleges Guide Ad (September; Theme: community service abroad)
• Montage Calendar (September; Theme: “Celebrating the Jesuit Educational Tradition and the Arts”)
• Loyola Executive (September; Includes a study abroad piece)
• LUNO Magazine (October; Includes New Class/Into the Streets article, Ignacio Volunteers article, MBA Program in Honduras article included in News section for fall 2011 LUNOM)
• What’s new! Fall 2102 Announcement
• Economic Impact Report (November; Community engagement)
• Service Learning Booklet (December; Theme: Cura Personalis)
• Christmas Video (December; Theme: Cura Personalis)
• Newsweek ”Best of Colleges & Universities” (December; Theme: community service abroad)
• Chronicle of Higher Ed Ad (January; service learning-focused)
• President’s Report (January; Includes 2010 achievements)
• Study Abroad mailer (January; Theme: Letters from Abroad)
• Media Guide to the Experts (February)
• Provost’s Report (February; Highlights academic achievements)
• Service Learning Booklet (March; Theme: Cura Personalis)
• Chronicle of Higher Ed Ad (March; study abroad-focused)
• LOYNO Magazine (March; Community Engagement column)
• USN&WR Best Grad Guide (May)

INTEGRATED CENTENNIAL MARKETING + COMMUNICATIONS CAMPAIGNS

Centennial Events Recap
Kick-off of the year-long celebration in honor of Loyola’s centennial began with a campus-wide event for all faculty, students, and staff on February 16. Public celebration of centennial activities began the week of April 9. The Centennial Week events coordinated and/or promoted by Marketing + Communications included:
• Centennial Mardi Gras Parade Party (internal roll-out)
• Centennial Lecture Series - Leading the Way: Loyola and the Desegregation of New Orleans
• Loyola’s Photographic Treasures with Harold Baquet
• Graphic Design Senior Exhibit Gallery Opening and Reception
• Jesuit Education &Social Change in Latin America Presentation, Fr. Alberto Munera, S.J.
• Loyola University Centennial Exhibit
• Centennial Weekend Kick-Off and Alumni Welcome Cocktail Reception
• Founded on Faith Loyola history lecture and book signing by Dr. Bernard Cook
• Loyola Concert Band premiering Centennial Fanfare by Col. John Bourgeois ’90, H’05
• 100th Anniversary Celebratory Mass with Sacred Music
• Founder’s Day Picnic Dinner Celebration with Live Music, video premier and fireworks
Attendance at all events exceeded expectations with over 325 attending the kick off reception, 700 to the Celebratory mass and over 600 to the picnic. Angela Turnbull, special events coordinator for the university, was key in the success of these very high profile events.

Centennial Marketing and Promotion
- In support of centennial, promotional ads were run in area publications including the Times Picayune, CityBusiness, Louisiana Weekly, Jewish News, Gambit, and The Maroon.
- New Orleans airport signage was updated with centennial graphics; an outdoor billboard “Celebrating 100 Years” is up on I-10, 30 double-sided centennial banners decorate both St Charles Avenue and Broadway.
- Produced a 10-minute definitive history of Loyola video, Founded on Faith, and three short historic video clips and one promotional video short.
- The centennial website launched February 13, 2012.
- Produced and facilitated the publication and printing of Founded on Faith.
- Updated signage across both campuses with new centennial graphics- more than 188 placements.
- Hosted two media lunches with key media leaders and Fr. Wildes to promote and inform them about our centennial’s significance; created and distributed 70 media kits
- Obtained six corporate sponsors ($27,500).
- Designed and executed the centennial logo and university brand standards.
- Produced centennial ad specialties (backpacks, pens, pencils, notepads, cups, and wristbands) given out during the Centennial celebration.
- Designed, developed and launched online presence for Centennial Celebration, facilitating promotion of events, university timelines, milestones, memories, and photo/video galleries.
- Produced and disseminated several press releases regarding various centennial activities and made direct pitches to local, regional and national news media.

Centennial Social Media Campaign
A Centennial photo posted to Facebook after the picnic garnered over 117 “likes” overnight. In support of Centennial, the following social media strategy was implemented:
Facebook
- Dedicated Centennial Landing Page
- Create FB events for all Centennial celebration events
- Targeted Centennial messaging
- Continued Alumni outreach – Share Your Memories initiative, Populate University Milestones to Facebook Timeline

Twitter
- Official Centennial hashtag to use in Centennial messaging
- Targeted Centennial messaging
FY 2012-2013

The FY13 Institutional Advancement’s goals are supported by Marketing & Communication’s goals, which additionally support the university’s goals of Loyola 2012.

The major objectives of the Office of Marketing & Communications for FY13 are:

- In support of Loyola 2012, enhance Loyola’s national reputation and brand awareness through external promotion of the university’s achievements and awards through local, regional, and national campaigns utilizing publicity, social media, videography, and paid advertising.
- Work with Alumni Relations to strategically engage alumni (increase participation in events/volunteering).
- Assist Annual Giving’s goal to increase alumni participation to 12% and Senior Class gift to 25%.
- Execute a successful Campaign Communications Plan to assist IA in achieving the FY13 campaign goals of $1.9 million in unrestricted and budget relief dollars, including completion of the campaign case statement and supporting documents.
- Execute, with other members of the university team, remaining year-long Centennial celebratory activities including preparation for the public launch of the Faith in the Future campaign.
- Engage Loyola neighbors to ensure Phase II of master plan is implemented smoothly as possible.
- Conduct an internal review and identify ways to streamline departmental processes based on identifying and satisfying those client needs in alignment with the university’s strategic plan with the goal of better utilizing staffing resources.
- Ensure smooth transition from Centennial branding back to university branding at the end of our Centennial activities; Engage Loyola community support of official branding policies and guidelines.
- Support the university’s recruiting efforts through strategic marketing communications efforts including development and execution of strategic integrated marketing campaigns utilizing publicity, web communications and marketing, social media, media placement, and direct marketing pieces.
- Evaluate and identify additional marketing resources required in support of potential Athletics conference division change and prepare assessment based on research and interviews no later than November 1, 2012.
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8/1 to 7/31</td>
<td>8/1 to 7/31</td>
<td>8/1 to 7/31</td>
<td>8/1 to 7/31</td>
<td>8/1 to 7/31</td>
</tr>
<tr>
<td>Prior Report to 6/30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted Income for Current Operations</td>
<td>$764,270</td>
<td>$690,366</td>
<td>$691,771</td>
<td>$754,921</td>
<td>$631,201 *</td>
</tr>
<tr>
<td>Unrestricted Goal</td>
<td></td>
<td></td>
<td></td>
<td>$1,000,000</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Percent of Goal Achieved</td>
<td></td>
<td></td>
<td></td>
<td>63.12%</td>
<td>60.01%</td>
</tr>
<tr>
<td>Comprehensive Campaign (Unrestricted &amp; Budget Relief) Gifts</td>
<td></td>
<td></td>
<td>$1,981,946 **</td>
<td></td>
<td>$1,965,857</td>
</tr>
<tr>
<td>Comprehensive Campaign (Unrestricted &amp; Budget Relief) Goal</td>
<td></td>
<td></td>
<td>$1,845,000</td>
<td></td>
<td>$1,845,000</td>
</tr>
<tr>
<td>Percent of Goal Achieved</td>
<td></td>
<td></td>
<td>107.42%</td>
<td></td>
<td>106.55%</td>
</tr>
<tr>
<td>New Gifts and Pledges</td>
<td>$6,550,336</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Gifts and Pledges Goal</td>
<td>$20,000,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent of Goal Achieved</td>
<td>32.75%</td>
<td></td>
<td></td>
<td></td>
<td>30.62%</td>
</tr>
<tr>
<td>Faith in the Future Campaign</td>
<td></td>
<td></td>
<td>$19,609,122 ***</td>
<td></td>
<td>$19,119,030</td>
</tr>
<tr>
<td>Faith in the Future Campaign Goal</td>
<td></td>
<td></td>
<td>$100,000,000</td>
<td></td>
<td>$100,000,000</td>
</tr>
<tr>
<td>Percent of Goal Achieved</td>
<td></td>
<td></td>
<td>19.61%</td>
<td></td>
<td>19.12%</td>
</tr>
<tr>
<td>Total Gift Income</td>
<td>$6,266,261</td>
<td>$6,095,280</td>
<td>$5,096,493</td>
<td>$7,104,686</td>
<td>$5,684,873</td>
</tr>
<tr>
<td>Total Gifts and Pledges</td>
<td>$9,179,233</td>
<td>$6,114,142</td>
<td>$5,115,265</td>
<td>$13,455,874</td>
<td>$9,622,895</td>
</tr>
</tbody>
</table>

* includes $34,493 annuity proceeds for Ganucheau Trust and other unrestricted income
** budget relief total adjusted down $25,000 by Financial Affairs since June 30 report
*** excludes annuities ($120,000) and Board of Regents ($160,000); otherwise all giving is $19,895,066

LOYOLA UNIVERSITY NEW ORLEANS
SUMMARY OF FUNDRAISING TOTALS, FISCAL YEARS 2008-2012
### Loyola University New Orleans

#### Gift Income Comparison, Fiscal Years 2008-2012

<table>
<thead>
<tr>
<th></th>
<th>8/1 to 7/31 FY 2008</th>
<th>8/1 to 7/31 FY 2009</th>
<th>8/1 to 7/31 FY 2010</th>
<th>8/1 to 7/31 FY 2011</th>
<th>8/1 to 7/31 FY 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outright Gifts for Capital Purposes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>$1,552,287</td>
<td>$2,385,278</td>
<td>$1,177,283</td>
<td>$978,396</td>
<td>$1,255,545</td>
</tr>
<tr>
<td>Property, Building &amp; Equipment</td>
<td>$303,000</td>
<td>$100,000</td>
<td>$314,551</td>
<td>$1,910,386</td>
<td>$1,340,575</td>
</tr>
<tr>
<td>Non-Endowed Programs &amp; Grants</td>
<td>$398,961</td>
<td>$320,883</td>
<td>$48,029</td>
<td>$1,185,205</td>
<td>$118,670</td>
</tr>
<tr>
<td>Gifts in Kind</td>
<td>$49,701</td>
<td>$209,894</td>
<td>$639,841</td>
<td>$69,359</td>
<td>$108,670</td>
</tr>
<tr>
<td>Annuities (Deferred Gifts)</td>
<td>$10,090</td>
<td>$466,345</td>
<td>$7,033</td>
<td>$268,986</td>
<td>$56,432</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$2,314,039</td>
<td>$3,482,400</td>
<td>$2,186,737</td>
<td>$4,412,332</td>
<td>$2,879,892</td>
</tr>
</tbody>
</table>

| **Outright Gifts for Current Operations** |                        |                        |                        |                        |                        |
| Restricted                | $3,189,951             | $1,952,513             | $2,217,984             | $1,937,432             | $2,213,273             |
| Unrestricted              | $764,270               | $660,366               | $691,771               | $754,921               | $601,708               |
| **Total**                 | $3,954,221             | $2,612,879             | $2,909,755             | $2,692,353             | $2,814,981             |

**TOTAL PRIVATE GIFTS**       | $6,268,261             | $6,095,280             | $5,096,493             | $7,104,685             | $5,694,873             |
## Loyola University New Orleans

### Gifts by Constituency 2011 - 2012

**August 1 to July 31**

<table>
<thead>
<tr>
<th></th>
<th>FY 2011 FYTD</th>
<th>FY 2012 FYTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alumni</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Operations</strong></td>
<td>$642,643</td>
<td>$764,558</td>
</tr>
<tr>
<td><strong>Capital Purposes</strong></td>
<td>$1,997,028</td>
<td>$508,941</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$2,639,671</td>
<td>$1,273,498</td>
</tr>
<tr>
<td><strong>Parents</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Operations</strong></td>
<td>$113,509</td>
<td>$236,913</td>
</tr>
<tr>
<td><strong>Capital Purposes</strong></td>
<td>$22,876</td>
<td>$23,365</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$136,385</td>
<td>$260,278</td>
</tr>
<tr>
<td><strong>Individuals</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Operations</strong></td>
<td>$700,332</td>
<td>$239,075</td>
</tr>
<tr>
<td><strong>Capital Purposes</strong></td>
<td>$1,638,748</td>
<td>$1,090,412</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$2,339,080</td>
<td>$1,329,487</td>
</tr>
<tr>
<td><strong>Corporations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Operations</strong></td>
<td>$248,366</td>
<td>$511,513</td>
</tr>
<tr>
<td><strong>Capital Purposes</strong></td>
<td>$98,830</td>
<td>$248,323</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$347,196</td>
<td>$759,836</td>
</tr>
<tr>
<td><strong>Foundations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Operations</strong></td>
<td>$775,952</td>
<td>$976,103</td>
</tr>
<tr>
<td><strong>Capital Purposes</strong></td>
<td>$138,375</td>
<td>$497,500</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$914,327</td>
<td>$1,473,603</td>
</tr>
<tr>
<td><strong>Organizations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Operations</strong></td>
<td>$211,551</td>
<td>$76,819</td>
</tr>
<tr>
<td><strong>Capital Purposes</strong></td>
<td>$178,130</td>
<td>$356,250</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$389,681</td>
<td>$433,069</td>
</tr>
<tr>
<td><strong>Subtotals</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Annual</strong></td>
<td>$2,692,353</td>
<td>$2,804,981</td>
</tr>
<tr>
<td><strong>Capital</strong></td>
<td>$4,073,987</td>
<td>$2,724,791</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$6,766,340</td>
<td>$5,529,771</td>
</tr>
<tr>
<td><strong>Gifts in Kind</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gift Annuities</strong></td>
<td>$69,359</td>
<td>$108,670</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>$7,104,685</td>
<td>$5,694,873</td>
</tr>
<tr>
<td>College</td>
<td>2011 Fiscal Year to Date Gifts Received to July 31, 2011</td>
<td>2012 Fiscal Year to Date Gifts Received to July 31, 2012</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Humartines &amp; Natural Science</strong></td>
<td>$168,057 Outright Gifts for Capital Purposes</td>
<td>$350,758 Outright Gifts for Capital Purposes</td>
</tr>
<tr>
<td></td>
<td>$95,412 Outright Gifts for Current Operations</td>
<td>$109,599 Outright Gifts for Current Operations</td>
</tr>
<tr>
<td></td>
<td>$63,145 Outright Gifts, Dean's Discretionary Funds</td>
<td>$63,254 Outright Gifts, Dean's Discretionary Funds</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$326,614 Total Received Humanities &amp; Natural Science</td>
<td>$523,611 Total Received Humanities &amp; Natural Science</td>
</tr>
<tr>
<td><strong>College of Business</strong></td>
<td>$1,489,975 Outright Gifts for Capital Purposes</td>
<td>$102,794 Outright Gifts for Capital Purposes</td>
</tr>
<tr>
<td></td>
<td>$153,085 Outright Gifts for Current Operations</td>
<td>$127,239 Outright Gifts for Current Operations</td>
</tr>
<tr>
<td></td>
<td>$176,776 Outright Gifts, Dean's Discretionary Funds</td>
<td>$131,098 Outright Gifts, Dean's Discretionary Funds</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$1,820,436 Total Received College of Business</td>
<td>$341,131 Total Received College of Business</td>
</tr>
<tr>
<td><strong>College of Social Sciences</strong></td>
<td>$208,717 Outright Gifts for Capital Purposes</td>
<td>$287,151 Outright Gifts for Capital Purposes</td>
</tr>
<tr>
<td></td>
<td>$82,657 Outright Gifts for Current Operations</td>
<td>$473,611 Outright Gifts for Current Operations</td>
</tr>
<tr>
<td></td>
<td>$8,925 Outright Gifts, Dean's Discretionary Funds</td>
<td>$5,729 Outright Gifts, Dean's Discretionary Funds</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$300,298 Total Received Social Sciences</td>
<td>$766,491 Total Received Social Sciences</td>
</tr>
<tr>
<td><strong>College of Law</strong></td>
<td>$430,802 Outright Gifts for Capital Purposes</td>
<td>$538,019 Outright Gifts for Capital Purposes</td>
</tr>
<tr>
<td></td>
<td>$327,371 Outright Gifts for Current Operations</td>
<td>$418,844 Outright Gifts for Current Operations</td>
</tr>
<tr>
<td></td>
<td>$215,935 Outright Gifts, Dean's Discretionary Funds</td>
<td>$135,579 Outright Gifts, Dean's Discretionary Funds</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$974,108 Total Received Law</td>
<td>$1,092,182 Total Received Law</td>
</tr>
<tr>
<td><strong>College of Music &amp; Fine Arts</strong></td>
<td>$483,417 Outright Gifts for Capital Purposes</td>
<td>$125,625 Outright Gifts for Capital Purposes</td>
</tr>
<tr>
<td></td>
<td>$129,141 Outright Gifts for Current Operations</td>
<td>$72,149 Outright Gifts for Current Operations</td>
</tr>
<tr>
<td></td>
<td>$50,312 Outright Gifts, Dean's Discretionary Funds</td>
<td>$50,050 Outright Gifts, Dean's Discretionary Funds</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$662,870 Total Received College of Music &amp; Fine Arts</td>
<td>$267,824 Total Received Music &amp; Fine Arts</td>
</tr>
<tr>
<td>LOYOLA UNIVERSITY NEW ORLEANS</td>
<td>GIFT INCOME COMPARISON BY COLLEGE</td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------</td>
<td></td>
</tr>
<tr>
<td>2011 Fiscal Year to Date Gifts Received to July 31, 2011</td>
<td>2012 Fiscal Year to Date Gifts Received to July 31, 2012</td>
<td></td>
</tr>
<tr>
<td><strong>Library Gift Total</strong></td>
<td><strong>Library Gift Total</strong></td>
<td></td>
</tr>
<tr>
<td>Campaign Type</td>
<td>Campaign Type</td>
<td></td>
</tr>
<tr>
<td>$44,635 Outright Gifts for Capital Purposes</td>
<td>$7,054 Outright Gifts for Capital Purposes</td>
<td></td>
</tr>
<tr>
<td>$28,226 Outright Gifts for Current Operations</td>
<td>$10,225 Outright Gifts for Current Operations</td>
<td></td>
</tr>
<tr>
<td>$11,509 Outright Gifts, Dean's Discretionary Funds</td>
<td>$12,640 Outright Gifts, Dean's Discretionary Funds</td>
<td></td>
</tr>
<tr>
<td><strong>$84,370 Total Received Library</strong></td>
<td><strong>$29,919 Total Received Library</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Athletics Gift Total</strong></td>
<td><strong>Athletics Gift Total</strong></td>
<td></td>
</tr>
<tr>
<td>Campaign Type</td>
<td>Campaign Type</td>
<td></td>
</tr>
<tr>
<td>$44,750 Outright Gifts for Capital Purposes</td>
<td>$138,737 Outright Gifts for Capital Purposes</td>
<td></td>
</tr>
<tr>
<td>$110,714 Outright Gifts for Current Operations</td>
<td>$84,976 Outright Gifts for Current Operations</td>
<td></td>
</tr>
<tr>
<td>$12,408 Outright Gifts, Dean's Discretionary Funds</td>
<td>$7,120 Outright Gifts, Dean's Discretionary Funds</td>
<td></td>
</tr>
<tr>
<td><strong>$167,872 Total Received Athletics</strong></td>
<td><strong>$230,833 Total Received Athletics</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Mission &amp; Ministry Gift Total</strong></td>
<td><strong>Mission &amp; Ministry Gift Total</strong></td>
<td></td>
</tr>
<tr>
<td>Campaign Type</td>
<td>Campaign Type</td>
<td></td>
</tr>
<tr>
<td>$25,540 Outright Gifts for Capital Purposes</td>
<td>$0 Outright Gifts for Capital Purposes</td>
<td></td>
</tr>
<tr>
<td>$15,350 Outright Gifts for Current Operations</td>
<td>$0 Outright Gifts for Current Operations</td>
<td></td>
</tr>
<tr>
<td>$52,559 Outright Gifts, Dean's Discretionary Funds</td>
<td>$90,688 Outright Gifts, Dean's Discretionary Funds</td>
<td></td>
</tr>
<tr>
<td><strong>$93,449 Total Received Mission &amp; Ministry</strong></td>
<td><strong>$90,688 Total Received Mission &amp; Ministry</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>Totals</strong></td>
<td></td>
</tr>
<tr>
<td>$1,534,126 Total Outright Gifts for Current Operations</td>
<td>$1,792,539 Total Outright Gifts for Current Operations</td>
<td></td>
</tr>
<tr>
<td>$2,895,892 Total Outright Gifts for Capital Purposes</td>
<td>$1,550,139 Total Outright Gifts for Capital Purposes</td>
<td></td>
</tr>
<tr>
<td>$591,570 Total Outright Gifts for Dean's Discretionary Funds</td>
<td>$496,157 Total Outright Gifts for Dean's Discretionary Funds</td>
<td></td>
</tr>
<tr>
<td><strong>$5,021,587</strong></td>
<td><strong>$3,838,835</strong></td>
<td></td>
</tr>
<tr>
<td>Constituency</td>
<td>FY 2011</td>
<td>FY 2012</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------</td>
<td>---------</td>
</tr>
<tr>
<td></td>
<td>8/1 to 7/31</td>
<td>8/1 to 7/31</td>
</tr>
<tr>
<td>Total Alumni</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergrad</td>
<td>28,676</td>
<td>28,676</td>
</tr>
<tr>
<td>Graduate</td>
<td>14,677</td>
<td>14,677</td>
</tr>
<tr>
<td>Certificate</td>
<td>1,769</td>
<td>1,769</td>
</tr>
<tr>
<td><strong># Donors</strong></td>
<td>3,337</td>
<td>3,760</td>
</tr>
<tr>
<td>Alumni Total</td>
<td>45,122</td>
<td>28,676</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human &amp; Natural Science**</td>
<td>9,392</td>
<td>8,877</td>
</tr>
<tr>
<td>College of Business**</td>
<td>9,999</td>
<td>8,754</td>
</tr>
<tr>
<td>Social Sciences**</td>
<td>15,742</td>
<td>9,947</td>
</tr>
<tr>
<td>College of Law**</td>
<td>7,429</td>
<td>7,429</td>
</tr>
<tr>
<td>Music &amp; Fine Arts**</td>
<td>2,446</td>
<td>2,446</td>
</tr>
<tr>
<td><strong>Indians Total</strong></td>
<td>1,313</td>
<td>1,007</td>
</tr>
<tr>
<td>Trustees**</td>
<td>28</td>
<td>21</td>
</tr>
<tr>
<td>Parents</td>
<td>588</td>
<td>637</td>
</tr>
<tr>
<td>Corporations</td>
<td>275</td>
<td>286</td>
</tr>
<tr>
<td>Foundations</td>
<td>94</td>
<td>101</td>
</tr>
<tr>
<td>Organizations</td>
<td>63</td>
<td>76</td>
</tr>
<tr>
<td>Grand Total</td>
<td>5,670</td>
<td>5,867</td>
</tr>
</tbody>
</table>

** Parenthetical
<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Category</th>
<th>Of Record</th>
<th># Donors</th>
<th>Part. Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year 2012</td>
<td>Undergrad</td>
<td>28,676</td>
<td>2,867</td>
<td>10.00%</td>
</tr>
<tr>
<td></td>
<td>Graduate</td>
<td>14,677</td>
<td>829</td>
<td>5.65%</td>
</tr>
<tr>
<td></td>
<td>Alumni Total</td>
<td>45,122</td>
<td>3,760</td>
<td>8.33%</td>
</tr>
<tr>
<td>Fiscal Year 2011</td>
<td>Overall Alumni Total</td>
<td>40,257</td>
<td>3,337</td>
<td>8.29%</td>
</tr>
<tr>
<td>Fiscal Year 2010</td>
<td>Overall Alumni Total</td>
<td>39,150</td>
<td>3,392</td>
<td>8.66%</td>
</tr>
</tbody>
</table>
NUMBER OF TOTAL DONORS FISCAL 09 TO 12


N  U  M  B  E  R  O  F  D  O  N  O  R  S

4,805  5,419  5,870  5,867

FISCAL YEARS
TOTAL OUTFRONT* GIFTS FISCAL 09 TO 12

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Dollars Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/1/2008 TO 7/31/09</td>
<td>$6,113,615</td>
</tr>
<tr>
<td>8/1/2009 TO 7/31/10</td>
<td>$5,121,674</td>
</tr>
<tr>
<td>8/1/2010 TO 7/31/2011</td>
<td>$7,104,685</td>
</tr>
<tr>
<td>8/1/2011 TO 7/31/2012</td>
<td>$5,694,873</td>
</tr>
</tbody>
</table>
TOTAL GIFTS & PLEDGES FISCAL 09 TO 12

DOLLARS RECEIVED

$6,114,142
$5,115,265
$13,455,874
$9,622,895

FISCAL YEARS

8/1/2008 TO 7/31/2009
8/1/2009 TO 7/31/2010
8/1/2010 TO 7/31/2011
8/1/2011 TO 7/31/2012