



Advancement Report May 17, 2024

Agenda Item #1: Dashboard

Information

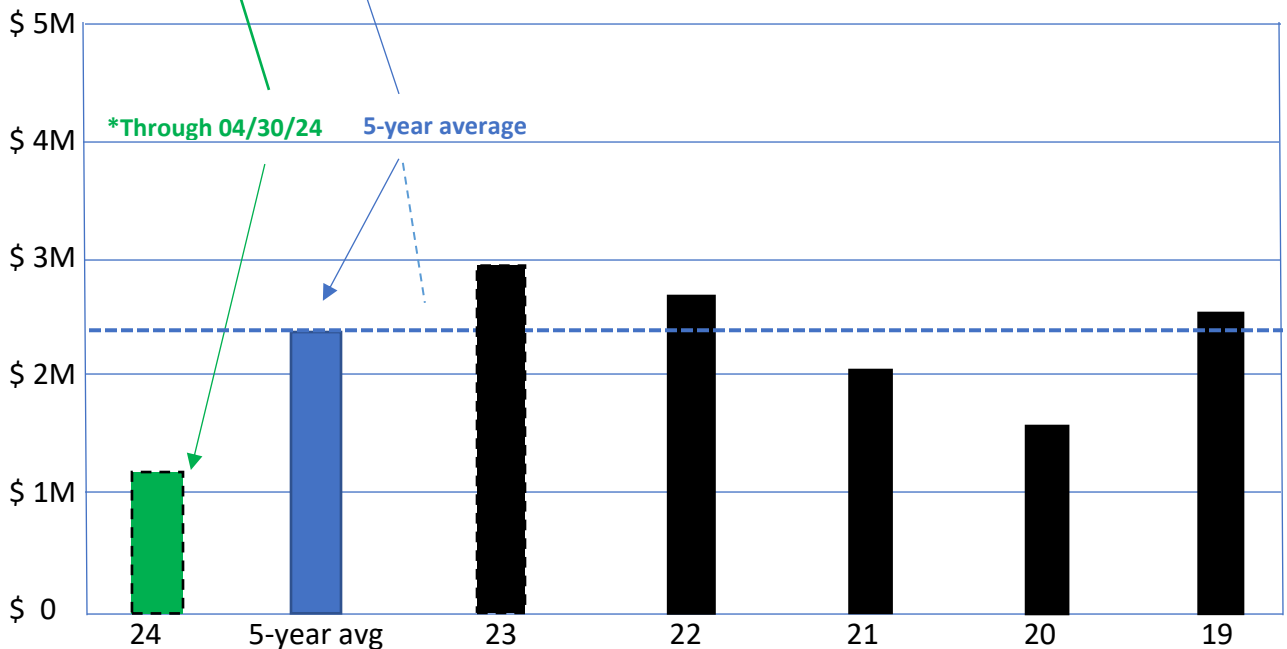
Action

Discussion

Purpose: The dashboard below compares **current fiscal year fundraising** to the previous five years by quarter. The **five-year average** is also included for comparison.
 Note: Financial data follows CASE industry standards and represents cash gifts, and documented pledges and estate gifts.

Dashboard 1 ~ Total Fundraising Five Year comparison: Year to Date (YTD) by Quarter (Q#)

Fiscal Year (7/1 – 6/30)	To date 2024	'19 – '23 5-year avg	2023	2022	2021	2020	2019
YTD							
July - Sept Q1	\$277,550	530,159	450,901	586,835	618,111	431,637	563,309
Oct – Dec Q2	\$241,543	622,778	289,855	1,347,312	311,982	753,192	411,550
Jan – Mar Q3	\$428,669	521,845	530,640	573,531	513,088	472,013	519,951
Apr – June Q4	\$240,367	716,981	1,643,509	198,225	593,960	35,917	1,113,295
Total	\$1,188,129	2,391,763	2,914,905	2,705,903	2,037,142	1,692,759	2,608,105



Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A



Advancement Report

May 17, 2024

Agenda Item #2: Major Gifts and Grants Update

Information

Action

Discussion

Background:

Major Gifts are defined by LSSU Advancement as gifts received in excess of \$10,000. The following summary represents the recent major gift activity in support of the University's current key initiatives since the September meeting.

A grant consultant was retained to identify potential grant funders in support of select LSSU strategic priorities. The consultant also provides background information on each grantor, a calendar of submission dates, and proposal review services.

Major Gifts: A generous gift of \$46,915.20 was received from the Clifford Bryce Nesselth Trust. The funds from this trust beneficiary gift will establish the Clifford and Pearl Nesselth Memorial Scholarship. Bryce directed that the trust proceeds create an endowment to honor his parents. The named endowment will provide financial assistance to LSSU students majoring in a College of Great Lakes Ecology and Education program who are pursuing a degree with a focus on fisheries, fresh water quality, or soil conservation. The first award will be given in the 2025-2026 academic year.

A gift of \$38,898.07 was received from the Kaleel D Jones & Josephine I Jones Charitable Trust. The annual spendable proceeds from the named trust support two named scholarships – the Kaleel & Josephine Jones Scholarship and the John Williams Jones VIII. The Kaleel & Josephine Jones Scholarship supports students majoring in engineering, nursing and education. The John Williams Jones VIII Scholarship supports students majoring in the criminal justice program.

A gift of \$21,981.65 was received from the Henry & Ruth Norvell Charitable Trust. This trust beneficiary gift is in support of Laker Hockey. Ruth Norvell was a long time LSSU employee. She and her husband were long-time Laker Hockey supporters. Ruth passed away in 2002. Upon Henry's passing in 2023, the Trust directed a distribution to LSSU.

William and Pamela Bacheler made a generous gift of \$39,562.91 through an IRA Distribution to fund the William & Pamela Bacheler Family Fisheries & Wildlife Scholarship (\$19,562.91), the LSSU Track and Cross Country Team (\$10,000) and the Bud Mansfield Student Emergency Fund (\$10,000).

The Wildshore Foundation, Inc. made a \$10,000.00 gift in support of the LSSU Undesignated Fund.

H. James and Ann Bourque made a \$10,000.00 gift in support of the Laker Men's Basketball Facility Renovation Campaign.

Michelle Somes-Booher and Douglas Booher made a gift of \$13,700.00 to establish the Corydon L and Nancy R Somes Scholarship to honor Michelle’s parents. Her father, Corydon Somes, who passed away in 2022, was a Sault High graduate, Soo Tech alumnus and former LSSU Board of Trustee member. The endowment will benefit an incoming freshman who is a graduate of Michigan’s UP pursuing a degree in any course of study at LSSU. The first award will be given in the 2024-2025 academic year.

Grants

To date 56 prospective funders have been identified. Data for each funder is put in the following table.

Prospective Funder	Capital Funding?	Grant Range	Process	Deadline(s)	GLEE/Barch CFRE	Undergrad Research	Pool	Tennis Courts	Prison Program	Nursing	Hatchery	Autism/ADA Compliance	Distance Learning	Native American	Research Vessel
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Coordinating with the VP of Advancement, LSSU leads for each strategic priority are responsible for writing grants and coordinating proposals.

	College/Department	Strategic Priority	Lead	Lead	Lead
1	Athletics	Natatorium	Steve Habusta	Tory Lindley	Mike Beazley
2	Athletics	Tennis Courts	Tory Lindley		
3	GLEE/Barch CFRE	Startup faculty	Ashley Moerke	Kimberly Muller	
4	Health & Behavior	Nursing Sim Ctr	Kathy Berchem		
5	Health & Behavior	Prison Program	Kathy Berchem	Marc Boucher	Kimberly Muller
6	Office of the President	Native American	Lynn Gillette	Kimberly Muller	
7	Science & Environment	Bio & Cancer Research	Steve Johnson		

Suggested Action/Motion:

No Action Required

President’s Recommendation:

N/A



Advancement Report

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Agenda Item #3: Annual Fundraising & Alumni Relations Update

Information

Action

Discussion

Purpose:

This agenda item provides a summary of the LSSU Advancement's recent Annual Fundraising and LSSU Alumni Relations activities.

Background:

Annual Fundraising activities provide financial support for University initiatives and assist in the identification of potential major gift donors. Alumni Relations activities and communications facilitate the initial engagement of alumni and friends to LSSU beginning the cultivation process for joining the Alumni Membership Program and potential future giving.

LSSU Advancement Annual Fundraising Activities:

Laker Club and Athletic Related Activity

Fiscal Year	Gross Revenue	Number of Donors
2023-24 (YTD Through 1/10)	\$56,364	112
2022-23	\$49,802	85
2021-22	\$54,411	113
2020-21	\$50,855	103
2019-20	\$51,952	129



Launched two new larger programs to support annual giving through Laker Club

- Pledge Per
 - New program for men's and women's basketball, men's and women's ACHA Hockey, and D1 hockey supporters to pledge per goal and assist (hockey), and pledge per rebound or 3-pointer (basketball).
 - **\$3,246** in gross donations was raised this year from the program.
 - Program includes a mix of new and existing donors, and has shown tremendous value in gathering up-to-date contact information on new, first time donors.
- Laker Meal Sponsor Program

- Starting with hockey, alumni can now sponsor a team meal on the road. Donors receive recognition via a social media shout-out thanking them for providing the team road meal. To date, **\$12,250** was raised for the season.
- Men's Basketball raised over **\$2,000** during their playoff run as part of the program.
- Volleyball has started to solicit gifts for next season.
- Additional sports will continue to be added.

Laker Men's Basketball Locker Room Renovation Campaign

The Laker Men's Basketball Locker Room Renovation Campaign is nearing its conclusion, as **\$205,000** of the **\$225,000** goal has been committed to the project.

You can click here to view the full scope, photo, and commitments to the campaign:

<https://advancement.lssu.edu/laker-basketball-facility-renovation/>

Annual Give-a-thon (Phone-a-thon)

To date, our student callers raised roughly \$20,000 for the Fund for LSSU as well as other scholarships and initiatives. So far they made over 2,000 calls to past donors, engaging in conversation about LSSU and updating donor records. Student calling will continue throughout the summer.

Fiscal Year	Gross Revenue	Number of Donors
2023-24	\$19,925	143
2022-23	\$20,395	144
2021-22	\$16,485	137
2020-21	\$15,860	109
2019-20	\$8,971	104

Friends of Laker Hockey

This program just concluded its second season, and for the second straight year we secured \$10,000 towards Laker Hockey. The program consists of four (4) weeknight sessions in an intimate setting with the team, and three (3) game night sessions with a behind-the-scenes experience. For next season the plan is to promote more broadly to add additional members.



Annual Lake State Golf Classic

The 35th Lake State Golf Classic is slated to take place on Friday, August 2nd 2024, on the heels of a record setting year with the first full field since 2008. Sponsors and golfers have already begun to sign up for the event, with close to 50 golfers already registered. Click here to register and to view the Classic Page: <https://advancement.lssu.edu/lake-state-classic/>

Fiscal Year	Gross Revenue	Net Revenue	Golfers	Location
2024				Wild Bluff
2023	\$52,892	\$35,931	144	Wild Bluff
2022	\$45,450	\$34,315	110	Wild Bluff
2021	\$41,686	\$34,161	108	Wild Bluff
<i>2020</i>	<i>COVID</i>	<i>COVID</i>	<i>COVID</i>	<i>Virtual</i>
2019	\$44,720	\$32,326	90	Wild Bluff
2018	\$32,740	\$17,897	76	Gaylord

Laker Lofts

LSSU Advancement is responsible for securing loft revenue each year for athletics. While the \$91,200 secured each year is not part of our fundraising dollars/balance sheet, it is an overall benefit to the university, and helps foster relationships that have resulted in additional fundraising and sponsorship dollars for the university. Currently there is a 10+ person waiting list for lofts.

Alumni Association

Events



Lake State Night at the Red Wings 2/10/24

We sold out our annual Lake State night at the Red Wings in February with the Wings winning in dramatic fashion on an overtime penalty shot. Thank you to all who came out! 250 tickets were sold for Lake State Night at the Red Wings. The Red Wings did a co-branded Wings/Laker jersey for everyone who purchased tickets through our group. Seamore again was in attendance. This event will happen again in early 2025. Date TBD.



Lake State Night at the Tigers – Saturday, August 17, 2024, 1:10pm

The annual LSSU Day at the Tigers game is slated for August 17th against the New York Yankees. There will be an alumni meet-up happening on the Pepsi Porch at 12pm. The first 15,000 fans will receive a bobblehead (while supplies last). Please refer to the alumni website to purchase tickets and register for the Alumni pre-game meet-up: <https://alumni.lssu.edu/lake-state-day-at-the-tigers/>



50 Years of Women's Athletics at Lake Superior State University

50 years of women's athletics at LSSU will be celebrated on September 19-21, 2024. The LSSU Volleyball home opener will take place that weekend, and many other events have been planned for this reunion. For additional information, visit the website at: <https://alumni.lssu.edu/50-years-of-womens-athletics-at-lssu/>



Great Lake State Weekend

GLSW is set for October 18-19, 2024. Plan to join us for a memorable homecoming celebration that includes exciting Laker hockey games, Alumni Awards and Hall of Fame ceremony, 1974 and 1994 Laker Hockey anniversary celebrations of the 1974 and 1994 National Championship hockey teams, Board of Trustees Tailgate Party, and more! Visit our website for more information as it becomes available: <https://alumni.lssu.edu/great-lake-state-weekend-2024/>

Alumni Awards Recipients

The LSSU Alumni Awards and LSSU Athletic Hall of Fame Inductions will take place on Saturday, October 19, 2024, as part of this year's Great Lake State Weekend activities. Tickets for the event will be available on the [Alumni Association website](https://alumni.lssu.edu), so be sure to check back for updates and ticket sales



This year's Outstanding Alumni Award recipient is Dr. Stephen Mulholland '83, who is originally from West Vancouver, British Columbia. The Outstanding Alumni Award honors personal and professional accomplishments and involvement with LSSU. This is the highest honor the Association presents. The award highlights significant achievements of alumni who serve as leaders in our region, state and nations. The first award was made in 1968.

This year's Kenneth J. Shouldice Achievement Award recipient is Steve Davies '77, who is from Etobicoke, Ontario. The Kenneth J. Shouldice Achievement Award recognizes personal and professional successes that serve as outstanding examples to LSSU graduates. The award highlights significant achievements of alumni who serve as leaders in our region, state and nations.

This year's Paul E. Ripley Award for Young Alumni recipient is Jeanna (Radzinski) Trotman '12, who is originally from Sterling Heights, MI. The Paul E. Ripley Award for Young Alumni honors graduates who have enjoyed exceptional personal and professional success early in their careers. Those honored must have graduated within the past 15 years and/or be no more than 40 years of age.

Athletic Hall of Fame Recipients

The Lake Superior State University Athletic Hall of Fame, established in 1995, recognizes individuals for their athletic accomplishments and contributions to the LSSU athletic programs as a student, coach or administrator. Selection to the Hall of Fame is based on athletic accomplishments and contributions to the LSSU athletic programs as a student, coach or administrator. A nominating committee comprised of alumni, coaches, former athletes and other University officials make the selections.



This year's inductees into the Hall of Fame are Keith Aldridge '96, who played Laker hockey from 1992-96. Keith is originally from Bloomfield Hills, MI and residing in Birmingham, MI; Chris Nance '96, who played on the Women's Basketball team from 1991-92 and 1993-96. Chris is originally from Newberry, MI and residing in Alanson, MI; and Eric Menk '96, who played on the Men's Basketball team from 1992-96. Eric is originally from Charlotte, MI and residing in Wesley Chapel, FL.

Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A



Advancement Report
May 17, 2024

Agenda Item #4: Legislative Affairs Update

- Information
 Action
 Discussion

Purpose:

The purpose of this submittal is to provide a summary of the linkage between the LSSU BOT approved strategic plan with LSSU Legislative Affairs and LSSU Advancement.

Background:

The following DRAFT dashboards provide a multi-year comparison between key legislative priorities. For example, once approved by the LSSU BOT, traditionally a state capital outlay is necessary for any capital campaign undertaking. Capital outlays provide 75% of the funding for projects like the Richard and Theresa Barch Center for Freshwater Research and Education, with the remaining 25% raised through a capital campaign.

Capital Outlay	2025 (TBD)	FY21 \$8.8M Barch CFRE	FY18 \$9M Considine	FY05 \$11.5M Arts Center
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Other legislative work is connected with LSSU strategic priorities and the higher education budget, which includes funding for LSSU and priorities like the Budget, Tuition, ITEMS (infrastructure, technology, equipment, maintenance, and safety), ITW (Indian tuition waiver), and MPSERS (Michigan public schools employee retirement system).

	2025 Proposed	2024 Actual
Budget	2.5%	5.0%
Tuition	4.5% / \$703	4.5% / \$676
ITEMS	(TBD)	\$762,300
ITW	(TBD)	Funded
MPSERS	\$4.1M	\$6.1M

The Prison Program and ensuring financial aid is available for those students is also a priority being tracked. If and when that occurs, Michigan will be the first state in the nation to allow it.

Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A



Advancement Report May 17, 2024

Agenda Item #5: Contributions to the Strategic Plan

Information

Action

Discussion

Purpose:

The purpose of this submittal is to provide a summary of the linkage between LSSU Advancement and LSSU Alumni Relations activities with the University's strategic plan.

Background:

The LSSU Board of Trustees approved a five-year strategic plan entitled; *Superior Education, Superior Experience, Superior You* at a special board meeting on April 24, 2020. This strategic plan will serve as a road map guiding our activities in support of the applicable strategies during this period.

- 2.3.1 Increase the number of annual and endowed scholarships targeting students from disadvantaged financial backgrounds.

Ongoing work with Deans, faculty and staff to encourage a coordinated effort around philanthropic outreach to increase scholarships, endowments and proposals in support of the LSSU Strategic Plan.

- This quarter, there is one new scholarship, the Clifford and Pearl Nesseth Memorial Scholarship, and an endowment builder fund, the Wesley DeJong Jr. Legacy Endowment, was established with funds donated over the last year.

The Clifford and Pearl Nesseth Memorial Scholarship will provide financial assistance to LSSU students majoring in a College of Great Lakes Ecology and Education program who are pursuing a degree with a focus on fisheries, fresh water quality, or soil conservation.

The distribution of the Wesley DeJong Jr. Legacy Endowment spendable funds will be awarded based on requests from the Laker Athletic equipment managers to address immediate equipment or priority needs of their respected DI or DII program.

- To date for FY24, 86 gifts to annual scholarships and endowments have been made totaling \$ \$780,611.00.

- 2.3.5 Increase and maintain a funding source for student emergencies.

The Bud Mansfield Student Emergency Fund is an ongoing fundraising priority for LSSU.

The new Soo Co-Op endowment will in part support Seamore's Closet, a food-bank available to all students at no charge.

- 2.3.6 Increase grant support to benefit students from socioeconomically disadvantaged backgrounds.

A grant consultant was retained to increase grant support for LSSU overall. A new Grant section has been added to the Major Gift section.

- 2.4.2 Increase communications highlighting successes, accomplishments, and key initiatives of students, faculty, staff, and alumni across multiple platforms and when possible invite community participation.

Campus Highlights 2021-22 was created and distributed in coordination with MarComm which will highlight LSSU successes.

The spring edition of the Laker Log e-magazine is released in May. Laker E-effect e-newsletters are released monthly, highlighting campus news/initiatives and highlighting alumni success.

- 3.2.14 Review the organizational structure of University Advancement and reorganize it for maximum fundraising effectiveness.

Transferred authority to award faculty and student grants to Provost, connecting strategic plan with academics and philanthropy.

Provost and Deans are now part of the Alumni Award selection committee.

Provost, Deans, Marketing, and Student Affairs are now part of GLSW planning.

- 3.2.15 Develop long-term fundraising goals in support of University strategic initiatives.

The Vice President of Advancement is currently developing goals for the upcoming fiscal year, including:

- Quantifying and surpassing the number and/or amount of annual major gifts acquired (\$10k+), and the number of new donors acquired annually.*
- Developing a process for identifying, vetting, prioritizing, budgeting and coordinating resources needed in support of the strategic plan.*
- Adhoc meetings are now set up with the Dean's to discuss grants and priorities.*

- 4.2.1 Create and share a reference list of key contacts at LSSU and the community for ease of communication.

Completed

- 4.2.2 Develop and maintain a promotional system in support of LSSU events and summer activities to broaden exposure, participation, and engagement.

Work continues with Marketing & Communications to develop campus wide calendar to realize economies of scale to promote and leverage efforts throughout campus.

Invitations to BOT members are going out for special events including GLSW, and the Detroit professional team games partnering with LSSU.

- 4.2.3 Increase awareness of LSSU programs that meet regional job market demands and offer future opportunities in step with economic trends.

Sharing LSSU Career Services information in issues of the Laker Log and on the alumni social media pages.

Career Fair during Great Lake State Weekend.

- 4.5.5 Enhance the opportunities for alumni and friends of the University to advance the institution with their time and resources.

Shared strategic plan with Alumni Association and Advancement to align their goals with LSSU's.

Secondary Strategies:

- 3.1.3 Develop a process for review/assessment that ensures expenditures are aligned with institutionally approved plans (e.g. LSSU Strategic Plan, LSSU Master Plan, Housing Master Plan, and Facilities Master Plan).

Working on process to align philanthropic priorities with strategic plan. Process will require needs to be: Identified, vetted, prioritized, budgeted, and coordinated.

- 3.2.11 Increase miscellaneous General Fund revenue (e.g. miscellaneous gifts, interest Income, Norris Center revenue, Arts Center revenue, and indirect costs).

Ongoing

- 3.3.6 Determine, and then utilize, best practices for communication to distinct constituent groups, including but not limited to prospective and current students, employees, alumni, and community members.

Laker Club communications will be targeted by sport specific demographics via e-mail, text and social media.

Ongoing social media and email messaging on a variety of topics to employees, alumni and community members.

- 4.1.3 Assign a liaison to facilitate interaction between LSSU and the community for internship opportunities, job shadowing, and hiring after graduation.

No update

- 4.2.4 Work with community partners to create and enact a plan to develop a “college town” atmosphere (i.e. the university pervades the economic and social life of the city).

President Gillette was a key-note speaker at the 2023 Annual Chamber Luncheon.

The relationship with MyMichigan Hospital and Bay Mills Community College has grown significantly in recent months through individual meetings and a new nursing related partnership between the three.

On Dec 4, 2023 LSSU hosted a City Commission meeting for the first time. President Gillette has been invited to speak.

Beginning 2024, LSSU flags will be hung on Ashmun St. and Portage Ave. from July 5 through GLSW.

- 4.5.1 University leadership will collaborate with local political, business, and community leaders.

Staff actively involved with Chippewa County Historical Society and Sault Ste. Marie’s Sunrise Rotary.

Advancement team member Andrew Rubinstein is a member of the Sault Ste Marie City Commission.

Interim President Gillette continues to attend many personal and group meetings.

- 5.4.2 Develop sustainability-related programs and events targeting the community.

No update.

Suggested Action/Motion:

No Action Required

President’s Recommendation:

N/A