

LAKE SUPERIOR STATE UNIVERSITY

2019-2023

5-YEAR REVIEW:  
ADVANCEMENT

## FY 2023 Operational Unit 5-Year Review

### Due by 4:00pm, February 15, 2024

Five-Year Assessment Reviews are required for all operational and academic units of the University. The five years under review for this report are FY2019 through FY2023. The due date for the 5-Year Operational (Departmental) Unit Review is February 15, 2024. This comprehensive review provides a record of the processes employed by your unit to evaluate functions, services provided, and progress toward achieving assigned Strategic Plan goals. If you have submitted your Annual Assessment Review forms each year since 2021, they are intended to be used as supporting documents for this 5-Year Review. Please use that information (or any other data and information you may have) to complete the sections in this 5-Year Review reporting form to explain your department's continuous improvement planning and Strategic Plan goal achievements over the past 5 years (FY2019-FY2023).

Program Review is required to fulfill the Higher Learning Commission's (HLC) conditions of accreditation for our institution. An Operational Unit may complete a single 5-Year Review Form if it has multiple subunits that are closely inter-related, but for autonomous units you will need to complete separate forms for each unit (e.g., Human Resources could conduct a single review for several of its HR-specific subunits, but will need to complete a separate review for a stand-alone subunit, such as Public Safety).

Reporting Years:	FY 2019 – FY 2023
Unit Name:	Advancement
Unit Contact:	Erin Lake
Unit Mission (if applicable):	Raise money in support of LSSU
This operational unit was assigned the following Strategic Plan Goals, and achieved some measure of progress toward meeting those goals:	<p><i>List all strategic plan goals this department has worked on over the past 5 years.</i></p> <p>2.3.1 Increase the number of annual and endowed scholarships targeting students from disadvantaged financial backgrounds.</p> <p>2.3.5 Increase and maintain a funding source for student emergencies.</p> <p>2.3.6 Increase grant support to benefit students from socioeconomically disadvantaged backgrounds.</p> <p>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.</p> <p>3.2.14 Review the organizational structure of the University Foundation and reorganize it for maximum fundraising effectiveness.</p> <p>3.2.15 Develop long-term Foundation fundraising goals in support of University strategic initiatives.</p> <p>4.2.1 Create and share a reference list of key contacts at LSSU and the community for ease of communication.</p>

	<p>4.2.2 Develop and maintain a promotional system in support of LSSU events and summer activities to broaden exposure, participation, and engagement.</p> <p>4.2.3 Increase awareness of LSSU programs that meet regional job market demands and offer future opportunities in step with economic trends.</p> <p>4.5.5 Enhance the opportunities for alumni and friends of the University to advance the institution with their time and resources.</p>
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## Part 1

In the left column, please copy/paste each of your unit's Strategic Plan goals (in numerical order) into individual text boxes. In the right column textbox next to the assigned goal, fill out the information connected to the goal to the right.

You may add/delete rows as needed to adjust for the number of Strategic Plan goals assigned to your Unit.

Strategic Plan Goal (list only one in each textbox in numerical order).	Strategic Plan Goal Progress: <i>briefly</i> describe the progress made thus far in achieving the goal listed to the left.
<p><b>Example:</b></p> <p>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).</p>	<ol style="list-style-type: none"> <li>1. As of (year) _____, this goal is achieved at _____%.</li> <li>2. Describe the actions taken in your department to achieve this goal:</li> <li>3. Describe how your department assessed its progress toward achieving this goal:</li> <li>4. If this goal is not yet 100% achieved, what action plans are in place to move forward toward its achievement, and who will perform the required work?</li> </ol>
2.3.1 Increase the number of annual and endowed scholarships targeting students from disadvantaged financial backgrounds.	In the past five years 17 endowed scholarships and 15 annual scholarships have been added.
2.3.5 Increase and maintain a funding source for student emergencies.	We raise funds annually for the, Bud Mansfield Student Emergency Fund. Since the strategic plan launched we have put an emphasis on this fund and increased both funds raised and allocated.
2.3.6 Increase grant support to benefit students from socioeconomically disadvantaged backgrounds.	Last year we contracted with a grant consultant. They have identified a number of grant funders who may support our strategic priorities. That work is in progress.
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.	The Laker E-ffect (published monthly) and Laker Log (published twice a year) are e-publications. They include news about strategic priorities as well as news about graduate success. We solicit for ideas and have a link for recommendations.
3.2.14 Review the organizational structure of the University Foundation and reorganize it for maximum fundraising effectiveness.	The Advancement team (formerly Foundation) has been restructured to emphasize fundraising. Over the last three years, fundraising is up 43%.

3.2.15 Develop long-term Foundation fundraising goals in support of University strategic initiatives.	Working with the President, we have identified a number of long-term strategic priorities, including: Simulation Center, GLEE and Barch CFRE, swimming pool, engineering building.
4.2.1 Create and share a reference list of key contacts at LSSU and the community for ease of communication.	Complete
4.2.2 Develop and maintain a promotional system in support of LSSU events and summer activities to broaden exposure, participation, and engagement.	Sold out the annual golf event for the first time in 20 years. Added downstate alumni events around all Detroit professional teams. Sold out allotment of tickets for LSSU night with the Red Wings. Sold out annual alumni award/Hall of Fame event. Working on regional watch-parties to leverage TV (subscription) coverage of LSSU sporting events.
4.2.3 Increase awareness of LSSU programs that meet regional job market demands and offer future opportunities in step with economic trends.	Established Cambium Analytica Living Learning Center, a campus housing unit dedicated to students majoring in Cannabis Chemistry and funded by Cambium Analytica (laboratory).
4.5.5 Enhance the opportunities for alumni and friends of the University to advance the institution with their time and resources.	Engage ad-hoc volunteer groups to champion campaigns for specific areas (ex: men's basketball locker room campaign, women's volleyball and basketball campaigns, grant consultant list of funders – will ask our volunteers and boards to identify anyone they know on funder boards.)

**Part 2:**      *(You may use your unit's Annual Assessment Reports from previous years to complete this section).*

### **Administrative Unit Goals:**

- Each year your administrative unit should set at least three goals to improve its processes, administration, staffing, infrastructure, unit operations, etc. List some of the most impactful improvement goals your department has set and achieved over the past five years:
  - Realign staff to fill most important roles. We have restructured our team to focus on fundraising.
  - Set annual fundraising goals. Goals set for each defined area (ex: total, phonathon, campaign)
  - Identify process to approve strategic priorities. A need can now be approved for fundraising.
- Describe how employee evaluations in your area are used to define and achieve new annual goals for your unit:
  - Part of the process is to ask the employee to set annual goals. Previously there were no goals set.
- Explain how unit-specific budget information is provided to staff to be discussed in your departmental meetings, and how that information is used to plan for continuing improvements in your unit:
  - We gauge our ROI each year (usually between 8:1 – 10:1). We can't spend funds unless they are in the budget.
- Provide a brief summary of goals set for your administrative unit during the past few years that were not specifically defined in the Strategic Plan, and report the status of achievement for those goals:
  - Raise \$3M annually. We didn't previously set an annual fundraising goal. Having this creates urgency and encourages the team to think of how to reach the goal.
  - Create regional watch-parties around LSSU athletic events. Expands our contact with alumni all over the state.

5. Based on your department's evaluative processes, list specific goals your administrative unit has identified and will strive to achieve in the near future:
- Annual fundraising goal – total
  - Annual fundraising goal – Annual fund (phonathon, special events)
  - Planned giving – document estate gifts that reach a certain value

Please attach any related documents (such as annual departmental meeting minutes, employee goal/evaluation documents, survey results, etc.) that support the narrative provided in your Annual Review. Submit this form to [gessmaker@issu.edu](mailto:gessmaker@issu.edu) no later than **4:00pm on February 15, 2024**.