



Advancement Report May 16, 2025

Agenda Item #1: Dashboard

☒ Information

☐ Action

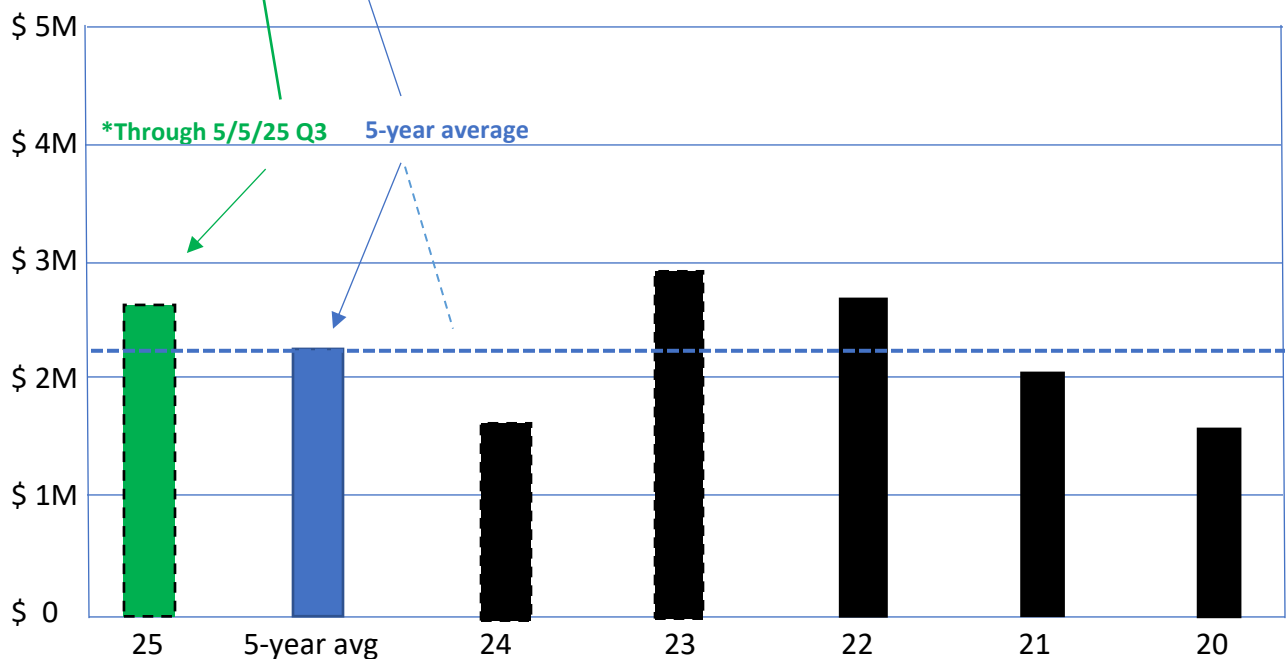
☐ Discussion

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 2025	'20 – '24 5-year avg	2024	2023	2022	2021	2020
YTD							
July - Sept Q1	148,898	473,007	277,550	450,901	586,835	618,111	431,637
Oct – Dec Q2	527,192	588,777	241,543	289,855	1,347,312	311,982	753,192
Jan – Mar Q3	169,406	503,588	428,669	530,640	573,531	513,088	472,013
Apr – June Q4	*1,750,633	637,744	717,111	1,643,509	198,225	593,960	35,917
Total	\$2,596,129	2,203,116	1,664,873	2,914,905	2,705,903	2,037,142	1,692,759



Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A



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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:

An anonymous pledge of \$1,500,000 (Jan 1, 2024 – June 30, 2025) was made in support of the newly established Laker Hockey Legacy Advancement Fund which supports the men's D1 hockey program at LSSU.

William and Pamela Bacheler made a generous gift of \$43,465 through an IRA Distribution to fund the William & Pamela Bacheler Family Fisheries & Wildlife Scholarship (\$20,564), the LSSU Track and Cross Country Team (\$10,000) and the Bud Mansfield Student Emergency Fund (\$12,901).

Marisa Berlinger made \$21,826 gift to endow her named scholarship, the Marisa Berlinger Business Scholarship. In 2023, Marisa Berlinger, a first-generation LSSU alumna and 2013 Business graduate, established the scholarship as a way to give back to the university where her journey started. Marisa is a University of Michigan-trained attorney living in Seattle, WA.

John and Mary Campbell made a generous gift of \$12,000 to their named endowment, the *John and Mary Campbell Scholarship*, which will benefit incoming freshmen who are entering the LSSU School of Engineering. The Campbell's attended LSSU in the early 1970's and greatly benefited from scholarships provided by the university at that time. Establishing this endowment is their way of paying it forward to local deserving students, supporting the university and the community.

Claude 'Bud' Denker made a \$50,271 contribution toward his existing pledge in support of the scholarship he established honoring his parents, the Claude and Mary Denker Endowed Scholarship (\$37,703) and the Nursing SIM Lab (\$12,568). The Claude and Mary Denker Scholarship provides financial assistance to students majoring in programs within the Lukenda School of Business.

A matching gift from Penske in the amount of \$10,000 was received (Bud Denker gift) also supporting the Claude and Mary Denker Scholarship.

A gift of \$52,122 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.

Brad LeBoufe made a \$10,000 gift in support of the IAB Engineering Growth Fund. Brad is a 2000 LSSU alumnus, and is a Senior Advisor with Neos Partners, San Diego, California.

Mission Design & Automation made a \$75,000 pledge in support of the IAB Engineering Growth Fund. Mission CEO, Scot Lindemann is a 1989 LSSU alumnus.

The Willamette Valley Company LLC PRE-TEC made a \$60,000 pledge in support of the IAB Engineering Growth Fund.

Michelle Somes-Booher and Douglas Booher made a gift of \$13,700 to endow the Corydon L and Nancy R Somes Scholarship, honoring 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 U.P. pursuing a degree in any course of study at LSSU.

Planned Gifts:

Steve Davies, a 1977 LSSC alumnus, has established a \$100,000 life insurance estate gift — representing 15% of an insurance policy to benefit the LSSU NCAA Men's Division I hockey team. The University will be named as a beneficiary, and the gift will support the team's greatest needs, as determined by the head coach and athletic director.

Grants:

A grant consultant was retained to identify funding opportunities for LSSU based on a list of LSSU priorities.

To date 56 prospective grant making organizations have been identified.

Next steps: An alignment of three key variables.

- Timing of proposals (many grantors limit proposals to certain times)
- Priority ranking of grant with LSSU strategic priorities (preparing proposals in consideration of how high a priority is to LSSU, and in consideration of a grantor who may be interested in more than one LSSU priority, and LSSU's ability to prepare a fixed number of proposals)
- Leveraging relationships between grantor boards and LSSU stakeholders (it helps to know grantor board members; ex: to be invited to apply, to get attention with the granting board)

The process requires ongoing attention and follow up for each grant opportunity. The Advancement team has not had a grant writer in over four years. Advancement is seeking approval to hire a Grants, Alumni, and Annual Fund Director.

Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A



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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
2024-25 YTD	\$75,216	122
2023-24	\$61,819	120
2022-23	\$49,802	85
2021-22	\$54,411	113
2020-21	\$50,855	103



Laker Meal Sponsor Program

The meal sponsor program continues to be the main driver for increased Laker Club revenue. This year, close to \$30,000 came in across all sports for the meal sponsor program, which surpasses the approximately \$15,000 that was raised last year. A major driver for this was the men's basketball run to the Elite 8, which resulted in approximately \$10,000 being donated to the meal sponsor program during that stretch.

Laker Men's Basketball Locker Room Renovation Campaign

The Laker Men's Basketball Locker Room Renovation Campaign continues to receive pledge payments, with approximately \$250,000 raised—surpassing our \$225,000 goal. Construction is currently paused while engineering adjustments are determined.

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

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

Laker Women's Basketball and Volleyball Locker Room Renovation Campaign

Preliminary work continues for the Laker Women's Basketball and Volleyball Locker Room Renovation Campaigns.

The first \$25,000 lead gift has been received, and an additional \$8,000 was raised through the celebration of 50 Years of Women's Athletics at LSSU this past fall.

Additional engineering plans are in progress to facilitate the campaign.

Planned Giving

A renewed focus is starting to be placed on planned giving. Recently, a \$100,000 life insurance estate gift was executed from Hockey Alum, Steve Davies.

An increased communication cadence around estate giving is planned once staffing is addressed and we move into the 2025-26 fiscal year.



Annual Lake State Golf Classic

The 36th Annual Lake State Classic will take place on Friday, August 1st at Wild Bluff. For this first time in almost a decade, we are bringing back a Thursday Night event that we're calling the "Classic Social", taking place at Wild Bluff. This allows an additional opportunity to connect with LSSU supporters, and raise additional funds for Laker Athletics. We hope to sell out the event for the 3rd straight year.

Click here for more information and to sign up: <https://advancement.lssu.edu/lake-state-classic-2025/>

Fiscal Year	Gross Revenue	Net Revenue	Golfers	Location
2024	\$50,620	\$38,604	*144	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

* Sold Out

Give-a-thon

The annual give-a-thon with student callers ran from late February through mid-April 2025. This year, we shifted back to using primarily evening callers, which allowed for more callers to be together at the Lukenda Alumni House.

Fiscal Year	Gross Revenue	Number of Donors
2024-25	\$19,175	171
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

Alumni Association

Events



LSSU Alumni Day at the Soo Greyhounds

For the first time since before the COVID-19 Pandemic, LSSU hosted an alumni event at the Greyhounds on February 23rd. While only approximately 20 people attended, we're excited to build on this momentum and plan to make it an annual event—with the opportunity to boost participation through earlier and more extensive promotion.



Lake State After Hours

Our 2nd Lake State After Hours took place at Moloney's on Wednesday, April 30th. A pre-COVID tradition, this event was brought back recently and held at two key times: the start of the fall semester and graduation week.

Upcoming Events



LSSU Day at the Tigers – June 7, 2025

LSSU Day at the Tigers will take place on Saturday, June 7th at 1:10pm as the Tigers take on the Chicago Cubs. The game will feature a Bobblehead giveaway to the first 15,000 fans, and we will be hosting an LSSU meet-up at the Comerica Landing in right field prior to the start of the game. You can RSVP for the social and purchase tickets here <https://alumni.lssu.edu/lake-state-day-at-the-tigers/>



Lake State Classic – August 1, 2025

The 36th Annual Lake State Classic is set for Friday, August 1 at Wild Bluff! For the first time in nearly a decade, we're bringing back a Thursday night "Classic Social" to connect with LSSU supporters and raise additional funds for Laker Athletics. Register your team or become a sponsor here: <https://advancement.lssu.edu/lake-state-classic-2025/>

Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A



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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 table

Capital Outlay	FY26 \$30M CASET (request)	FY21 \$8.8M Barch CFRE Approved	FY18 \$9M Considine Approved	FY05 \$11.5M Arts Center Approved
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The Prison Program and ensuring all eight paths to financial aid are 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.

Recent activity

State of Michigan

April 23, 2025, President Travis was invited to the state capitol to testify before the Appropriations House Subcommittee on Higher Education. His testimony can be seen at <https://www.youtube.com/watch?v=kMnBWV-Y8e8>

The President's address included:

- Appreciation for the state's past support

- Observations over his first year as President
- Economic impact (ROI 150%)
- Important relationship between LSSU, Sault Ste. Marie, and the eastern U.P.
- High percentage of graduates who remain in Michigan – over 70%

In addition, the President and Scott Smith had meetings before and after his testimony with:

Rep Greg Markkanen, R, 110th House District (western Upper Peninsula)
Chair, House Appropriations subcommittee on Higher Education. Met with Rep. Markkanen.

Rep Nancy Jenkins-Arno, R, 34th House District (southern Michigan, Lenawee County)
Member, House Appropriations subcommittee on Higher Education. Met with aide, Josh Haley.

Sen Sean McCann, D, 19th Senate District (Kalamazoo area)
Chair, Senate Appropriations subcommittee on Higher Education. Met with COS, Shane Muchmore.

Sen John Damoose, R, 37th Senate District (northern lower and eastern upper peninsula)
Member, Senate Appropriations subcommittee on Higher Education. Met with the Senator and COS, Cheryl Khoury.

Sen Ed Mcbroom, R, 38th Senate District (Upper Peninsula, minus eastern U.P.)
Met with the Senator and COS, Paul Burns.

U.S. Congress and Senate

Submitted Congressional Discretionary Spending (CDS) requests to both U.S. Senators, Peters and Slotkin.

A CDS request to Congressman John Bergman is anticipated to be submitted in the near future.

Suggested Action/Motion:

No Action Required

President's Recommendation:

N/A