



MIDWESTERN STATE UNIVERSITY

University Advancement and Public Affairs

Wednesday, January 23, 2019

Presented by

Tony Vidmar

**Vice president for University Advancement
and Public Affairs**

And

Julie Gaynor

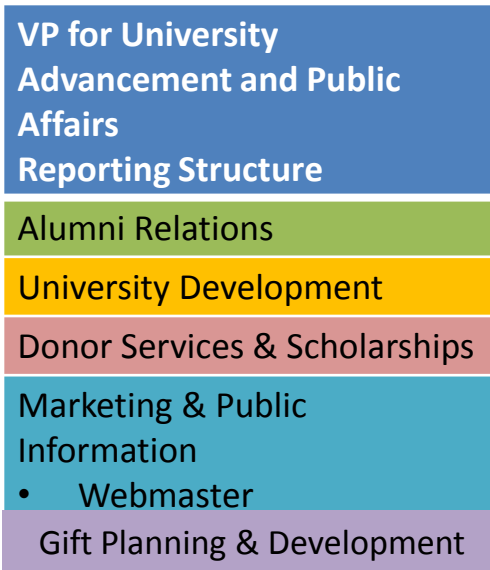
Director of Marketing and Public Information



The mission of the Division of University Advancement and Public Affairs is to acquire and cultivate relationships with alumni, faculty, staff, parents, and friends of the university to help support the educational mission of Midwestern State University and to promote and market the university.

Essentially we are tasked with increasing

- 1. Awareness of,
- 2. Engagement in, and
- 3. Giving to



University Advancement 24000 4000 \$277,606

- Salary, fringe benefits, and longevity for two (2) full-time employees
- Student Wages
- Travel
- Maintenance and operations
- Utilities

Univ Adv Reserve 24002 4000 \$47,014

- Travel
- Promotional items
- Advertising
- *Pentera- marketing service for Planned Giving Program

**Since August 1, 2017 the accounts also support the Assistant Vice President for Gift Planning and Development operations*

Both the **MSU Foundation** and the **MSU Charitable Trust** were established for the purpose of receiving, holding, investing, and dispensing the proceeds of gifts made for the benefit of Midwestern State University. They assure donors that their gifts will be maintained and distributed in compliance with their individual wishes.

What is the MSU Charitable Trust?



Midwestern State University Charitable Trust was chartered as a charitable trust by the state of Texas on March 21, 1989. The trust is separate from the university. However, the MSU Charitable Trust is governed by the university in that the supervision and control of the organization's Board of Trustees rests in the Board of Regents of the university.

Holdings as of November 30, 2018 \$30,346,812

MSU Charitable Trust Distributions



Bridwell Trust	\$ 500
Edwards Trust	\$ 0
Daniel Trust	\$247,163
Fain Art Trust	\$129,004
M.R. Wood Health Sciences Trust	\$ 48,250
Perkins Prothro Liberal Arts Trust	\$ 76,987
C.E. Prothro Scholarship Trust (Business)	\$ 35,586
Perkins Prothro Professorship (Geology)	\$ 9,000
M.R. Wood Unrestricted Trust	\$ 67,295
MSU Museum Trust	\$119,361
Dillard College of Business Administration Trust	\$159,000
Lalani Center Trust	\$ 7,500
Roy H. Smith Scholarship Trust	\$ 3,856
J.R. Harvey Fine Art Trust	\$ 38,246
Harvey Visiting Artist Trust (O'Donnell)	\$ 8,000
Total MSU Charitable Trust Budget for 2019-2020	\$949,748

What is the MSU Foundation?



Midwestern State University Foundation, Inc. was chartered as an independent, tax-exempt foundation by the State of Texas on February 23, 1960. It is an incorporated, nonprofit organization developed solely for the benefit of Midwestern State University.

Holdings as of August 31, 2017

\$23,682,072

MSU Foundation, Inc. Distributions



Scholarships	\$423,953
Other Projects	\$131,020
Rodriguez Fund	\$ 7,140
Hardin Foundation Support	\$ 17,500
McAda Graduate School Endowment	\$ 78,661
Gunn Health Science Endowment	\$ 52,335
Kimbell School of Geosciences Endowment	\$ 43,109
Mont Davis Endowment	\$ 5,946
Gunn Endowment for the College of Science & Mathematics	\$ 42,689
McCoy Foundation (Scholarships)	\$ 80,000
Total MSU Foundation Budget for 2018-19	\$882,353

Total of MSU Texas held endowments:

August 31, 2016 \$19,867,239

August 31, 2018 \$22,960,980

giving to MSU Texas...

University Development

The Office of University Development is designed to generate an increasing donor base and pipeline that will provide a sustainable source of income for Midwestern State University. In order to accomplish this goal, the office has developed the MSU University Development area to solicit private contributions from a variety of sources.

- Alumni Giving
- Annual Fund
- Faculty and Staff Giving
- Student Giving
- Parent Fund
- Corporate Giving
- Friend and Former Student Giving
- Major Gifts/Principal Gifts
- Presidential Donor Solicitation, Cultivation, and Stewardship
- Leadership Annual Giving

The Annual Fund provides a source of unrestricted support to Midwestern State University. Support and awareness for the university is raised through a number of avenues including:

- Direct mail pieces
- Email communications
- Phonathon (Student Calling Program)
- Partnerships with campus-wide units

Funds generated through the Annual Fund promote academic excellence through:

- Scholarships
- Faculty development
- Facility improvements
- Student research opportunities
- Up-to-date equipment and software
- Events and programs

Build and maintain relationships with alumni and other constituents

- Cultivate and reactivate donors
- Acknowledge and steward the generosity of donors and the impact of their gifts
- Maximize the opportunities and convenience for alumni, faculty and staff, friends, and parents to support any area at MSU Texas



- Verify and update contact information of constituents for university updates and other notices
- Share news and updates about MSU Texas; increasing institutional awareness and pride

Annual Fund Operations 24104 4100 22 \$384,519

- Salary, fringe benefits, and longevity for four (4) full-time employees
- Communication pieces (Direct mail and email)
- Promotional items
- Travel and business meals
- Maintenance and operations

Annual Fund Phonathon 24100 4100 22 \$48,939

- One (1) part-time student supervisor
- Sixteen (16) part-time student callers

Student Giving **24102 4100 22** **\$500**
Expenses related to marketing/promoting “giving back”
to MSU Texas at special events (Imagine Graduation and Maverick’s
birthday)

Parent Giving **24103 4100 22** **\$2,000**
Expenses related to:

- M.O.R.E. Parent Receptions
- Signage and print materials

Donor Data and Research **24105 4100 22** **\$5,706**

- Maintenance and operations
- Software
- Travel
- Training

giving to MSU Texas...

Donor Services and Scholarships

The Office of Donor Services and Scholarships administers the university's scholarship program and works with all colleges, departments, service areas, donors, and the general public regarding donations, scholarship awards, and related issues.

- **Duties and responsibilities include:**
Managing, budgeting, and performing extensive record keeping of 275+ scholarships and accounts
- Coordinating more than 6,900 scholarship awards totaling \$6.7 million annually, including approximately 750 outside scholarships totaling in excess of \$939,000



Staffing in Donor Services and Scholarships continues to be a distinct challenge since the elimination of one full-time position in 2010.

AcademicWorks is a comprehensive scholarship management solution that will greatly enhance our efforts, including increased donor engagement and ensuring fund compliance.

FY 20 and beyond annual cost is \$16,875.
Admissions will pay 2/3 of the cost and Advancement will pay 1/3 of the cost.

FY20+ University Advancement portion is \$5,625

engagement in MSU Texas...

Alumni Relations

The Office of Alumni Relations is the liaison between the university and more than 39,000 alumni living across the United States and the world.



Responsibilities include:

- Developing and coordinating of all alumni activities and engagement opportunities
- Homecoming events (fish fry, recognizing outstanding alumni, tailgates, 50-year and affinity reunions)
- Host Social and informational events throughout Texas, with presidential alumni and events outside Texoma
 - Including Dallas, Fort Worth, Oklahoma City and more

- Contributing alumni information for *Sunwatcher Magazine*
 - Where they are now (including babies and weddings)
 - Memorials
- Distributing the monthly MSU Texas Connection (electronic newsletters), birthday greetings, plus an additional special event or athletic announcements, via email to 49,000 constituents
- Overseeing the MSU Alumni Association 16-member Board of Directors and more than 4,000 annual members
- Working to unite alumni and students as one through on- and off-campus events and engagement programming, including the new Student Alumni Council
- Process and maintain Alumni Association membership records. Yearly solicitation of membership renewals and recruits

Alumni Relations	24500 4500 20	\$173,236
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- Salary, fringe benefits, and longevity for one (1) full-time and one (1) 3/4 time employees
- Two (2) student assistants
- Alumni engagement events and alumni awards ceremonies
- Travel
- Maintenance and operations

awareness of MSU Texas...

Marketing and Public Information

The Office of Marketing and Public Information provides university information to the public and campus community and markets the university to a variety of audiences to promote awareness, pride, and support.

The office also works closely with the Office of Admissions, as well as a number of departmental offices, to produce recruiting materials that reinforce the university's mission and brand.



Marketing and Public Information Funding



Public Information	11000 14200 22	\$123,449
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Salary, fringe benefits, and longevity for two (2) full-time employees		

Public Information	24200 4200 22	\$191,432
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<ul style="list-style-type: none">• Salary and fringe benefits for one (1) half-time employee and two (2) full-time employees• One (1) student assistant and one (1) part-time temp assistant• Travel• Maintenance and operations		

Marketing	24204 4200 22	\$436,800
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Expenses related to advertising including:		
<ul style="list-style-type: none">• Outdoor, print, digital, and specialty advertising• Community and high school advertising• Design/Photography• Promotional materials• Sunwatcher Magazine		

Expansion into the Dallas-Fort Worth market

As the university further expands its footprint into the Dallas-Fort Worth market, additional funds will be necessary to promote our adult education options and build community college partnerships as well as retain and enhance our traditional population base.

Expenses related to a successful marketing effort include:

- Additional outdoor/specialty advertising
- Radio/Pandora advertising
- Targeted social media advertising
- Printed recruitment publications
- Direct-mail campaign
- Print media
- Additional FTE to lead digital marketing in Flower Mound

Additional funding

We estimate that an additional \$100,000 is necessary to maintain and expand an effective comprehensive marketing campaign.

We also request that the public relations specialist position be considered as critical classification as there has not been a robust applicant pool for the open position.

The University Webmaster serves as the central coordinator for all areas of the Midwestern State University website. The staff works closely with technical staff and coordinates the work of administrators, faculty, and students in developing and maintaining consistent quality of the university's web presence.

Responsibilities include:

- Developing integrated marketing strategies in consultation with administrative sitemasters
- Creating and maintaining custom databases that allow MSU personnel to manage content
- Creating and implementing marketing and promotional projects
- Researching and implementing web applications
- Training for faculty, staff, and students

Webmaster

24201 4200 22

\$160,102

- Salary, fringe benefits, and longevity for two (2) full-time employees
- One (1) student assistant
- Maintenance and operations
- Yearly maintenance agreements

The university website is a vital component to reaching our target audience. In order to keep up with the demands of today's students and from falling behind in technology, additional funding will be necessary to provide for software and hardware support, and training and travel opportunities.

508 compliance software/training (mandatory state requirement)	\$10,000
Critical classification status for Web Designer position	\$ 4,250
Total investment	\$14,250

The University Print Shop supports the overall goals of the university by promoting and enhancing the institutional image through quality printing while integrating new technology to maintain a strong commitment to serving its customer base.

Services provided include:

- Printing, variable data, laminating, numbering, shredding, binding, hole drilling, gluing, mounting, scoring, stitching, and perforating
- Desktop publishing, design, and layout support for the campus community
- Authorized printer for business cards, letterhead, and campus forms
- Printing for registered student organizations
- Thesis printing and Commencement printing

University Print Shop Revenue



Projected Budget for FY19	\$295,890
Revenue YTD (December)	\$ 93,072
Projected Balance	\$202,818

<u>Print Shop and Supply</u>	<u>24202 4200 22</u>	<u>\$280,894</u>
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- Salary, fringe benefits, and longevity for four (4) full-time employees (One position has been vacant since September)
- Maintenance and operations

•*Note: Vacant position that will not be filled (\$30,000 savings)*



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