

NMU Foundation Update

March 15, 2018



NORTHERN MICHIGAN UNIVERSITY

NMU Foundation Mission

The NMU Foundation will establish and foster relationships to generate resources that benefit the strategic goals of Northern Michigan University



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Historical Notes

In 1959, the first fundraising organization for NMU was established – the Northern Michigan College Foundation (NMCF).

In 1963, the NMCF organized as a 501c(3) and was renamed the NMU Development Fund in tandem with NMC becoming NMU.

Over subsequent years, the Development Fund primarily secured resources for specific purposes and projects.

In 1996, Northern Michigan University launched a comprehensive fundraising campaign, *This Decisive Season*, with a goal of \$30 million.



Historical Notes

In 2003, the campaign ended realizing \$36 million.

In 2004, the NMU Development Fund changed its legal name to the NMU Foundation and entered into a Memorandum of Understanding (MOU) with the University.

In 2005, The Foundation began preparations for a campaign focused on scholarships.

In 2007, *The Campaign for the Students of Northern Michigan University* was launched with a goal of \$25 million.

In 2014, the campaign ended realizing \$26 million.



Historical Notes

In 2016, the Foundation began reorganizing under a CEO model.

In 2016 and 2017, the Foundation began reviewing and updating policies, practices and completed reorganization to achieve greater effectiveness, efficiency and impact.



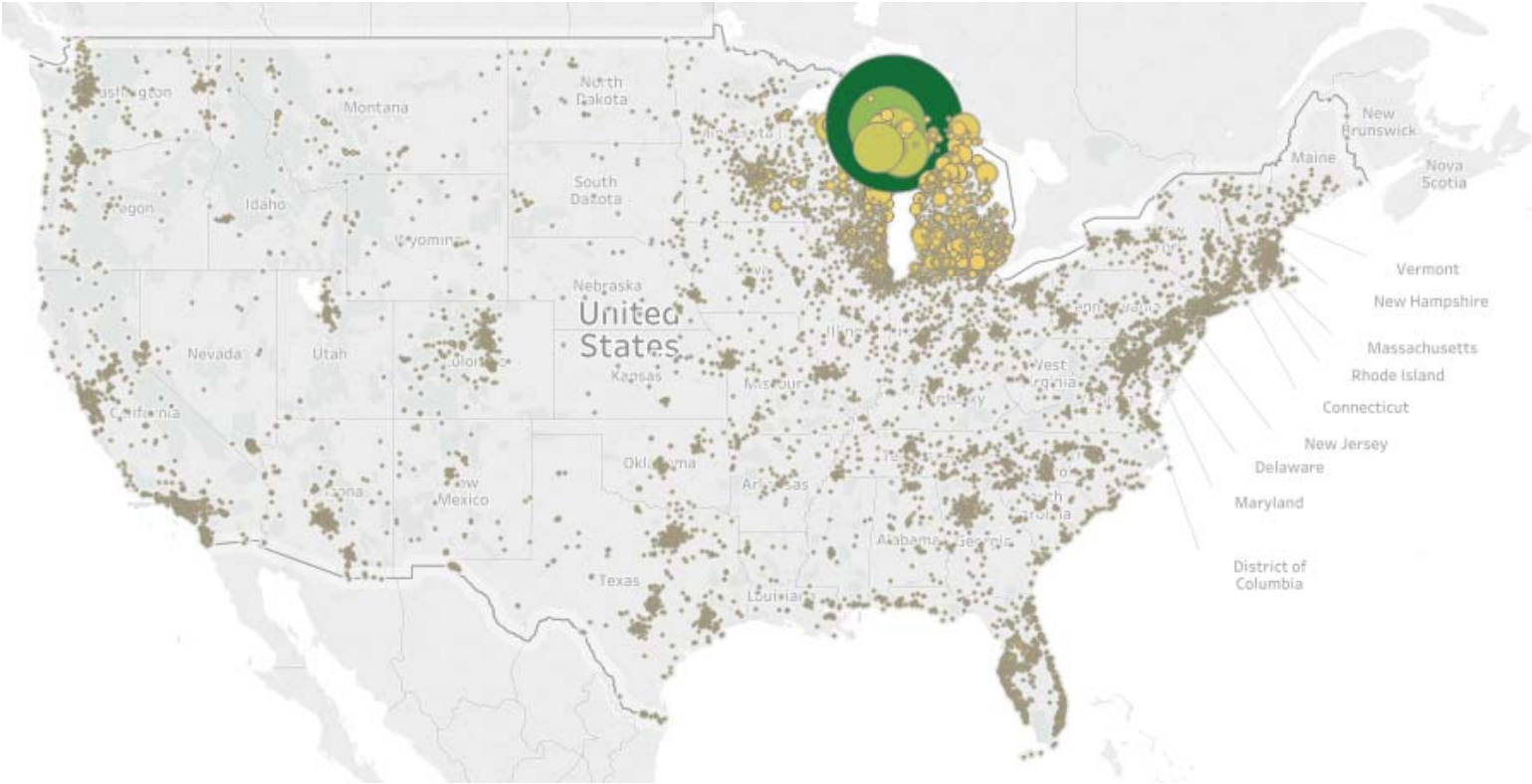
Alumni Facts

Living Alumni	68,416
Contactable by Mail	65,658
Contactable by Phone	35,303
Contactable by Email	21,541
Alumni Graduated Since 2000	40%
FY17 Alumni Giving Participation Rate	4.4%



Alumni Distribution

Total: 68,416



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Foundation Staffing

2004

1st campaign ended

12.5 FTEs

2007

2nd campaign fully staffed

21 FTEs

2016

7 full-time positions phased out

13 FTEs

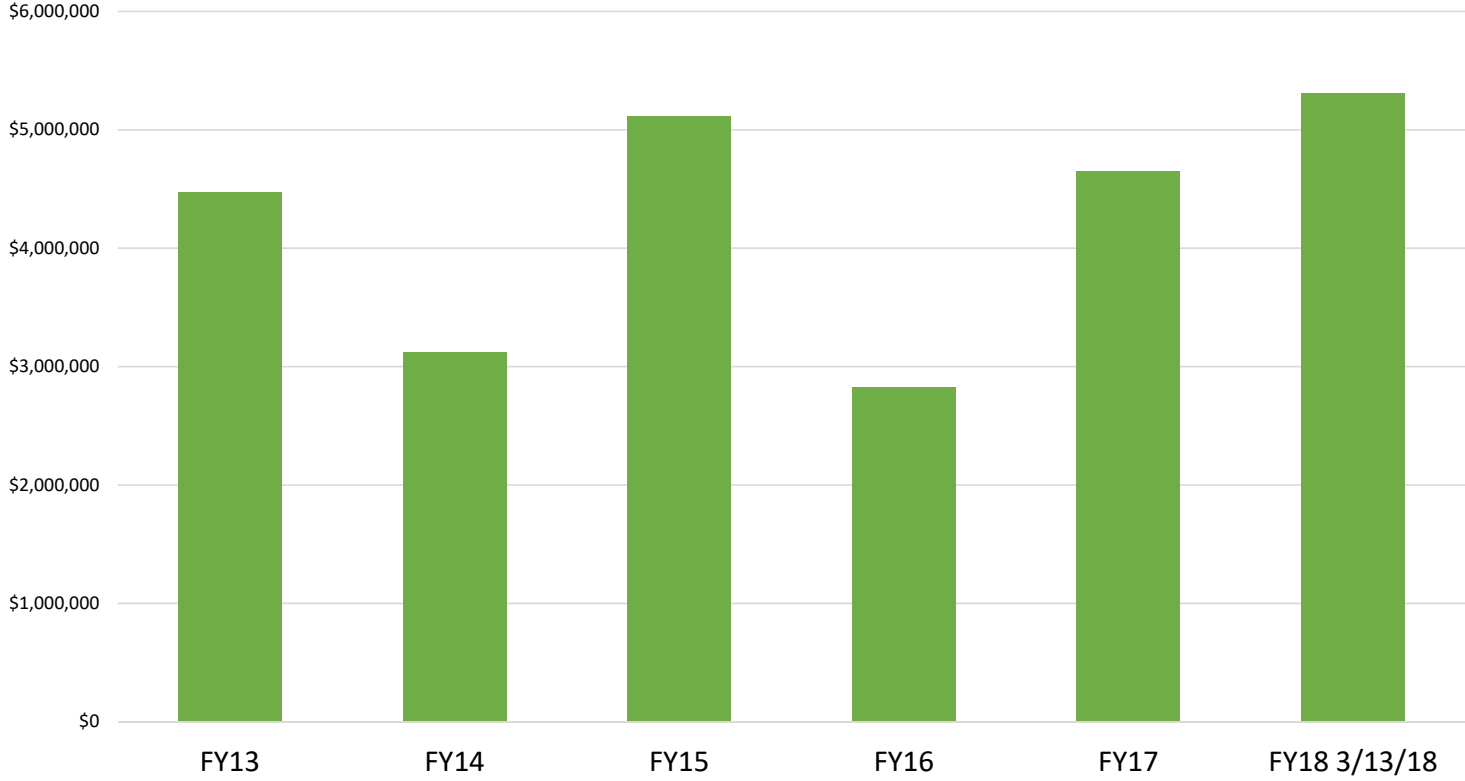
2017

Reorganization under new CEO complete

14 FTEs

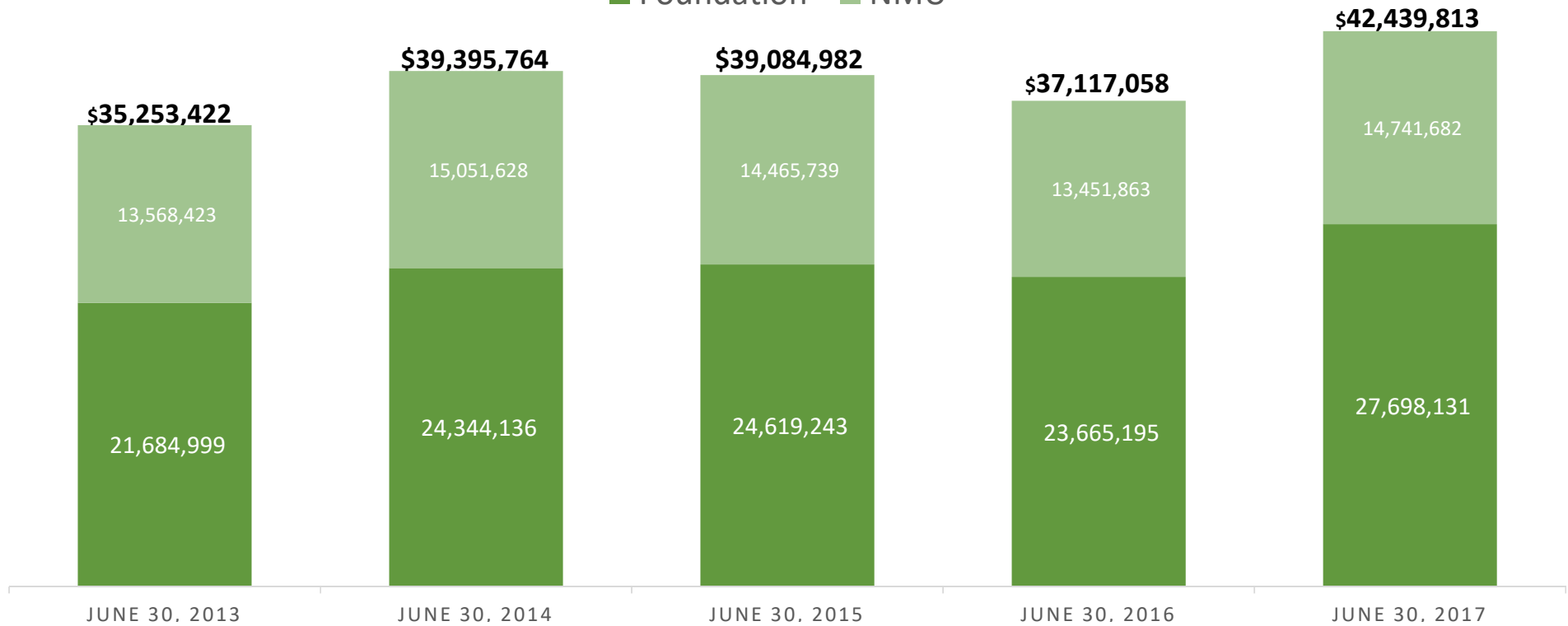


Fund Raising Production



Endowment Market Value*

■ Foundation ■ NMU



* Does not include \$14,350,000 PV of expectancies.



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NMU Foundation Strategic Plan

- Previous strategic plan: 2011-2015.
- Current planning through 2020.
- Foundation strategic objectives will align with and support:
 - The University strategic plan.
 - University special initiatives.



Strategic Focus Areas

- Positioning:** What is NMU, how is it different and what does it want to be?
- Data:** Build systems environment – ability to support a true campaign and enable continuous growth.
- Messaging:** Measurable case for support – consistency across multiple platforms.
- Engagement:** Building deep relationships to benefit the University's strategic goals.



Campaign Planning

Northern Michigan University will execute a comprehensive campaign beginning in 2020.

Preparation requires:

- Acknowledging and addressing current internal and external environments.
- Establishing the organizational, financial, data, messaging and engagement framework for continuous success.



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The Ramp Up - Critical Laundry List

- Positioning/SRA completion + implementation
- Data environment/systems upgrade
- Messaging/communication
- Engagement/connection
- Talent development/training (including leadership and faculty)



The Ramp Up - Critical Laundry List

- Clean up small endowment accounts
- Achieve budget draw target of 1.5%
- Finalize operations/program improvements
- Close 8 - 12 commitments of \$1 million +
- Talent enhancement/execution



Action Steps

2018

- February BOT meeting
- March Strategic Planning and Budgeting Advisory Committee
- May campus leadership retreat
- May FBOT meeting



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Action Steps

2018 (continued)

- Appoint and convene internal planning committee
- Recruit Northern Fellows
- Begin 3-year national event program
- Continue building communication platforms



Action Steps

2019

- Engage consultant

2020

- Recruit and convene campaign planning task force
- Begin campaign counting

2022

- BOT and FBOT authorize campaign
- Public launch



Action Steps

2024

- 125th anniversary of NMU

2027

- Campaign end

