

# University Advancement

FY 2026 Strategic Plan Alignment and Budget Presentation

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# Division of University Advancement

- Advancement Services
- Alumni Relations & Annual Giving
- Development
- Donor Relations
- Sam Houston Memorial Museum & Republic of Texas Presidential Library

# FY 2025 Accomplishments

## Alumni Relations & Annual Giving

### Priority 1: Prioritize Student Success and Student Access

- Empowered Students: Empower students to drive sustainable growth
  - Increased Alumni Ring program participation
    - Fall 2024
      - 807 rings sold in Fall 2024
        - Sales increase of 10% compared to Fall 2023
      - 619 students registered for Fall 2024 ceremony
        - Participation increase of 4% compared to Fall 2023
    - Spring 2025
      - 651 rings sold in Spring 2025
        - Sales increase of 0% compared to Spring 2024
      - TBD students registered for Spring 2025 ceremony → Ring Ceremony registration is ongoing
  - Spring 2025, we added an additional ceremony to accommodate increased student participation
    - April 22 and April 23 at Johnson Coliseum

# FY 2025 Accomplishments

## Development & Donor Relations

### Priority 1: Prioritize Student Success and Student Access

- Empowered Students: Empower students to drive sustainable growth
  - Increased Scholarships
    - Total scholarship awards = \$3,903,255 → Increase of 14% over LY
    - Number of scholarships awarded = 495 → Increase of 3% over LY
    - Number of students supported with scholarships = 1,250 → Increase of 14% over LY
  - Grand Opening of the new Chuck and Wanda Beckner Tennis Center
    - New facility enables the tennis team to practice and compete locally while positioning SHSU to host NCAA championship events.
  - Secured funding for new Smith-Hutson Financial Center and Trading Floor
    - New trading center enables COBA to drive student recruitment and enrollment for business/banking program
    - Grand Opening for Trading Floor in Fall 2026

# FY 2025 Accomplishments

## Development

### Priority 2: Embody a Culture of Excellence

- Process Alignment: Align processes and resources to strategic priorities (ex: staffing, facilities, technology, etc.)
  - Improved portfolio management with new software, Evertrue in March 2025.
    - EverTrue provides deeper insight into donor data and highlights major gift prospects to engage, ask, and steward.
  - Launched new Leadership Annual Giving (LAG) program to bridge the gap between annual giving (gifts up to \$1,000) and major gifts (gifts over \$25,000).
    - In February 2025, two new LAG officers joined the team, focusing on securing recurring, high-impact donations to support operations, fund key projects, strengthen donor relationships.

# FY 2025 Accomplishments

## Alumni Relations & Annual Giving

### Priority 3: Elevate the Reputation and Visibility of SHSU

- **Community Engagement:** Establish a more visible and high-profile culture of philanthropy, service, and community engagement
  - Annual Faculty & Staff Campaign
    - 1,432 employees (60% of faculty and 61% of staff) participated and raised more than \$237,000. More than 500 employees opted for payroll deduction and 257 funds are supported with these donor gifts.
  - Sam Houston 79 Business Awards Luncheon
  - 2<sup>nd</sup> Annual Giving Day – April 22, 2025
- **Quality Events:** Increase high-profile quality events hosted by SHSU
  - Distinguished Alumni Gala
  - Alumni Lifetime Member Dinner Celebration
  - Alumni Ring Ceremony

# FY 2025 Accomplishments

## Donor Relations

### Priority 3: Elevate the Reputation and Visibility of SHSU

- **Quality Events: Increase high-profile quality events hosted by SHSU**
  - Signing Days, Room Dedications, and Naming Ceremonies
  - Groundbreaking Ceremonies, Grand Openings, and Ribbon Cutting Ceremonies
  - Face to Face Scholarship Luncheon
    - This event offers donors and their scholarship recipient the opportunity to meet face-to-face and connect.

# **FY 2025 Accomplishments**

## **Sam Houston Memorial Museum**

### **Priority 3: Elevate the Reputation and Visibility of SHSU**

- Community Engagement: Establish a more visible and high-profile culture of philanthropy, service, and community engagement
  - Sundown at Sam's music concert series at the Museum – March, April, May
  - General Sam Houston Day – April 26, 2025



# FY 2025 Accomplishments

## Alumni Relations & Annual Giving

### Priority 4: Expand and Elevate our Service to the State and Beyond

- **Community Engagement:** Establish community engagement as a signature high-impact practice and program for the university
  - Enhance relationships through Chamber partnerships – Huntsville Walker County Chamber of Commerce, Conroe - Lake Conroe Chamber of Commerce, The Woodlands Area Economic Development Partnership, The Woodlands Area Chamber of Commerce, Greater Houston Partnership
- **Alumni Clubs:** Use regional Alumni clubs to facilitate university initiatives
  - Eliminated Alumni annual membership dues and reimaged Alumni Clubs to Alumni Networks
    - Life Members enjoy exclusive access to university events, special discounts, and recognition. Life Membership enhances alumni experience and supports SHSU's mission.
  - “SHSU Bound Tour” – Alumni partnership with Admissions for regional events where alumni and prospective students can network

# FY 2025 Accomplishments

## Sam Houston Memorial Museum

### Priority 4: Expand and Elevate our Service to the State and Beyond

- Engagement: Provide innovative ways to engage and serve the community
  - 70,000+ visitors at the SH Museum & Republic of TX Presidential Library
  - Museum “artifact vault tours” for legislators, regents, and prospective donors.
  - “An Evening with Sam” immersed guests in a historical reenactment, bringing history to life in an entertaining and educational way.
  - “Sundown at Sam’s” music concert series at the Museum – March, April, May
  - General Sam Houston Day – April 26, 2025

# FY 2026 Keep Doing

## **Statement:**

The University Advancement Office plans to **keep** the leadership annual giving (LAG) program because it will bridge the giving gap between annual funds and major gifts. This action aligns with Strategy 3: Elevate the reputation and visibility of SHSU and Goal 3.6 - Establish a more visible and high-profile culture of philanthropy, service, and community engagement and will have a vetted pipeline for prospect management and major gifts in achieving Pillar 4 - Agility.

## **Supporting Data:**

See next slide.

## **Resources / Collaborations Required:**

Continued collaboration with division and academic units, continued staffing, and growth of operating budget for travel and professional development are needed.

# Division of University Advancement

## NEW Fundraising Structure



# FY 2026 Keep Doing

## Statement:

The University Advancement Office plans to **keep** growing the Advancement team personnel count because growing the team is how we can attain the philanthropic goals of the university. This action aligns with Strategy 3: Elevate the reputation and visibility of SHSU and Goal 3.6 - Establish a more visible and high-profile culture of philanthropy, service, and community engagement and will have a positive impact on donor engagement and philanthropy in achieving Pillar 4 - Agility.

## Supporting Data:

Increased investment and staff drive fundraising production.  
See EAB stats on next slide.

## Resources / Collaborations Required:

- Need additional funding and resources to create a career ladder within division to RECRUIT and RETAIN top talent for the university. Offering competitive salaries will retain top talent.
- New personnel – Directors of Development, LAG Officers, Advancement-specific Writers (Technical Writers/Grant Writers), Advancement-specific Marketing and Communication Experts

# Increased Investment and Staffing Drive Fundraising Production

Staff size	Average advancement investment	Average fundraising production
Under 30	\$2.8M	\$11.7M
30-49	\$5.5M	\$39.0M
50-99	\$11.8M	\$62.2M
100-149	\$18.0M	\$148.5M
150+	\$39.2M	\$290.7M



**+909K**

Every additional FTE adds, on average, **\$909K to annual production totals.**

# FY 2026 Keep Doing

## Statement:

The University Advancement Office plans to **keep** the Giving Day fundraising platform because it provides an engaging and effective way for alumni, students, friends, and administration to give back to the university. This action aligns with Strategy 3: Elevate the reputation and visibility of SHSU and Goal 3.6 - Establish a more visible and high-profile culture of philanthropy, service, and community engagement and will have promote a culture of philanthropy while also increasing the donor pipeline for LAG officers in achieving Pillar 4 - Agility.

## Supporting Data:

Last year, the first-ever Giving Day raised \$237,242 from 728 gifts – shattering our 100k goal and expectations. This year, our Giving Day goal is to raise \$300,000 from 800 donors.

## Resources / Collaborations Required:

Contract with Crowdfunding platform is set to expire this summer (August 2025).  
A new RFP is open and accepting public bids. Additional funding for contract negotiations will be needed.



# GIVING DAY 2025

SAM HOUSTON STATE UNIVERSITY

## APRIL 22, 2025





# FY 2026 Stop Doing

## Statement:

The University Advancement Office plans to **STOP** over-relying on the same donors for funding because it has caused donor fatigue and could potentially decline donor engagement. This action aligns with Strategy 2: Embody a culture of excellence and Goal 2.6 - Revenue generation and optimization and will have increase our ability to reach a newer donor base in achieving Pillar 4 - Agility.

## Supporting Data:

See next slide.

## Resources / Collaborations Required:

We require Advancement-specific marketing and communication personnel to implement and align division-wide marketing and communications strategies across all communication platforms to ensure our targeting efforts are not overused on one group of donors continuously as it has been previously.

## What is Donor Fatigue?

- Decline in giving or involvement caused by donors feeling overwhelmed or desensitized by frequent and relentless appeals for financial support.



# Strategies to Combat Donor Fatigue & Keep Donors Engaged

- Get personal
  - *Donor Spotlight* stories
  - Student testimonials
- Inspire with non-fundraising community outreach events
- Thank donors and illustrate their impact
  - Donor Impact Report
  - Newsletter
- Activate donors as **Advocates**
  - Invite donors to serve on committees
- Galvanize donor base through volunteer opportunities

# FY 2026 START Doing

## Statement:

The University Advancement Office plans to **START** Advancement-specific marketing and communications because advancement-specific communications will focus on donor-focused content (proposals, solicitations, emails, social media, invites, etc.) that will better engage our donors. This action aligns with Strategy 3: Elevate the reputation and visibility of SHSU and Goal 3.6 - Establish a more visible and high-profile culture of philanthropy, service, and community engagement and will have positive results in closing proposals and driving donor engagement online (socials, emails, etc.) in achieving Pillar 4 - Agility.

## Supporting Data:

UA lacks Advancement-specific communications professionals, forcing UA personnel to either produce materials internally or rely on journalistic generalists from IMC – who require UA to conduct its own donor-specific research in developing materials. This inefficiency delays critical fundraising efforts and weakens engagement with donors.

## Resources / Collaborations Required:

We require \$125,000 in funding for a new position (Director of Advancement Communications) to lead fundraising campaigns and division-wide marketing and communications efforts. This expert will ensure a unified, donor-focused messaging strategy across all platforms (social media, email, proposals, etc.).

We require \$100,000 in O&M funding to develop high-quality campaign-specific marketing and communications collateral and software to engage and solicit major gift prospects effectively. Marketing materials and software are essential in presenting compelling cases for financial support, showcasing the university's goals that resonates with high-level donors.

# Key Aspects of Advancement Communications in Higher Ed

- Create Connection with a Donor-Centric Focus
- Develop and execute strategic communications that build philanthropic support for the university
- Design, write, and produce creative communications that convey clear and compelling messages
- Connect donors' passions to inspire and motivate giving

# Advancement Communications

- Ensures Unified, Donor-Focused Messaging Strategy Across all Platforms
  - Donor Event Invitations
  - Email & Newsletters
  - Social Media
  - Website
- Campaign Optimization
- Fundraising Appeals
- Customized Donor Proposals
- Annual Donor Impact Report
- Develops Omnichannel Campaigns Telling Our Story
- Digital Marketing to Grow Donor Ecosystem
- Marketing Partner and Liaison with IMC

# FY 2026 START Doing

## Statement:

The University Advancement Office plans to **START** increasing grant and foundation applications because grants increase the overall giving revenue to the university. This action aligns with Strategy 2: Embody a culture of excellence and Goal 2.6 - Revenue generation and optimization and will have a positive impact on increasing number of grants from private foundations in achieving Pillar 2 - Retention.

## Supporting Data:

We currently have one Director of Development for Foundation Relations who is responsible for developing relationships with colleges and corporations. In addition to her relationship building and building proposals/asks, she is responsible for researching available grant opportunities, writing/developing grant applications, and overseeing awarding and reporting requirements.

FY23 Grants submitted = 16, requesting \$2.2M → 8 received approval for \$2.0M

FY24 Grants submitted = 18, requesting \$2.0M → 5 received approval for \$787K

FY25 YTD Grants submitted = 14, requesting \$1.8M

FY25 YTD Grant activity = 8 received approval for \$506K → Grants submitted during FY may not be awarded until following FY

Total Grants Request = \$7.5M; Funded = \$3.3M → 44% Return

## Resources / Collaborations Required:

We require \$76,954 in funding for a new position (Grant Coordinator) to conduct grant research, draft compelling proposals and grant applications, and oversee required reporting to foundations to secure more private corporate/foundation funding.





# Why Grant Writing is Important

- Increase Funding Opportunities
- Enhance Credibility and Visibility
- Build Capacity
- Enhance Collaboration and Networking
- Promote Innovation and Program Development



# University Advancement Summary

## Keep Doing

Keep #1: Leadership Annual Giving Program

Keep #2: Growing Advancement Team

Keep #3: Giving Day

## Stop Doing

Stop #1: Donor Fatigue

## Start Doing

Start #1: Advancement Communications Director

Start #2: Grant Coordinator

# Questions?



Sam Houston  
State University

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM