

LSU Foundation

Strategic Operations & Donor Systems Analysis

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MBA Team Project

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My Contributions

- Organizational analysis
- Porter's Five Forces assessment
- Information systems evaluation
- Strategic recommendations

This document is a portfolio version of a team project. Identifying information related to team members has been removed.

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Executive Summary

The LSU Foundation raises and stewards private support for LSU. This paper examines the entire donor gift cycle because it is where value is created for both donors and campus units. Work once lived in multiple tools and handoffs, which caused rework, slow stewardship, and limited visibility into pipeline health and cash timing. The current information systems (IS) stack addresses these gaps with Blackbaud CRM (BBCRM) for constituent records, Workday for accounting and distributions, Power BI (PBI) for analytics, and Jira Service Management (JSM) for data quality and controlled changes. The result is a single source of truth that connects relationship activity to compliant financial movement and measurable outcomes.

BBCRM centralizes constituent, interaction, and proposal data and incorporates third-party data to prioritize prospects. Workday integration closes the financial loop with auditable postings and on-schedule distributions to unit budgets. PBI turns donor and finance data into operational metrics staff can act on, and JSM enforces standards for data changes and enhancements. Together, this produces fewer handoffs, faster stewardship, cleaner coding, and clear ownership from first touch through reconciliation and stewardship. A key shift is treating inventory as the donor pipeline and the funds that will flow to units. Proposal stages, aging, and capacity indicators support forecasting so leaders can intervene early rather than explain variances later.

The impact is measurable. Manual corrections are down, receipting is faster, portfolio management is more proactive, and fund-level transparency strengthens donor trust and unit confidence. LSUF can track specific service levels, including online receipts within 48 hours, physical gifts within 10 business days, agreement to posting within 10 business days, monthly distributions on schedule, and automatic flags for proposals that sit more than 90 days.

This analysis identifies a strong foundation with clear systems of record, an auditable finance link, and dashboards that drive timely action. Compared with more customized platforms, LSUF's right-sized approach is cost effective and stable, with room to expand analytics in PBI without replacing core systems. Recommendations focus on publishing data quality and timeliness metrics, adding privacy-aware upgrade and churn models with next-best actions, formalizing service levels, elevating donor experience with tracked stewardship journeys, and reducing vendor risk through sandbox testing, power-user depth, and documentation. The takeaway for leadership is that these systems directly improve revenue predictability, donor satisfaction, and trust.

An Overview of the LSU Foundation

The LSU Foundation (LSUF) was founded on February 20, 1960, under Chairman Murphy J. Foster, following board member C. Arthur Provost's research into university fundraising models at institutions like the University of Chicago and Ohio State (LSU Foundation | History, n.d.). It was created to centralize philanthropic support for LSU.

Today, LSUF employs nearly 100 fundraisers and staff and is governed by a 23-member Board of Directors, chaired by Beau Fournet, with executive leadership from President and CEO Robert M. Stuart Jr. As LSU's primary academic fundraising entity, LSUF is a nonprofit organization that facilitates philanthropic giving, manages endowed funds, and oversees private investments.

Mission Statement

The LSU Foundation will realize this vision through its mission to cultivate and invest in philanthropic partnerships to advance LSU's academic priorities (*LSU Foundation | Mission, Vision & Values*, n.d.).

Vision Statement

The LSU Foundation's vision is to catalyze transformational philanthropic support for LSU. (*LSU Foundation | Mission, inVision & Values*, n.d.).

Assets, Liabilities and Investments

In 2023, LSUF reported total assets of \$921.9 million and total net assets of \$762 million. By 2024, these figures increased to \$985.2 million in total assets and \$814.4

million in total net assets (EisnerAmper, 2024, Figures 1-2). Liabilities totaled \$159.8 million in 2023 and \$170.7 million in 2024 (EisnerAmper, 2024, Figure 3). LSUF's investment portfolio grew from \$667 million in 2023 to \$767.8 million in 2024 (EisnerAmper, 2024, Figure 4).

Organizational Standing and Competitors

LSUF is recognized as the flagship fundraising entity among several LSU-affiliated philanthropic organizations. It holds this position due to its financial capacity, scope, and formal designation as LSU's primary academic fundraising body.

Peer organizations include the Tiger Athletic Foundation (TAF), which supports LSU athletics; the LSU Health Foundation (LSUHF), which funds the health sciences campuses in New Orleans and Shreveport; and the LSU Alumni Association (LSUAA), which focuses on alumni engagement and student scholarships. Despite shared goals, each organization operates independently and serves distinct donor segments.

In 2023, LSUF reported \$762 million in net assets, growing to \$814 million in 2024 (EisnerAmper, 2024, Figure 2). In comparison, TAF reported \$310 million in 2023 (LaPorte, 2023, Figure 5), while LSUHF grew from \$154 million in 2023 to \$164 million in 2024 (LSU Health Foundation New Orleans & LaPorte, 2024, Figure 6).

Focal Business and Supporting IS

The donor gift cycle is central to LSUF's operations. This process includes donor identification, relationship cultivation, contribution solicitation, pledge and gift processing, and stewardship. While many of these efforts involve in-person or physical

outreach, information systems enhance and streamline the process by supporting data tracking, communication management, and reporting across all stages of engagement.

LSUF uses BBCRM as its primary platform for managing development officer (DO) portfolios and donor relationships (Blackbaud CRM for LSU Foundation, n.d.). BBCRM centralizes donor and alumni data helping to streamline gift processing, communication tracking, segmentation, and reporting. It enables targeted outreach, enhances engagement, and supports stewardship efforts.

Additional collaboration and data visualization is managed through Microsoft 365 (Teams, PBI), and Atlassian's JSM assists with constituent updates and gift processing. These tools collectively support portfolio management, internal coordination, and donor communication.

The integration of these platforms has improved operational efficiency, donor retention, and data-informed decision-making. However, challenges such as system adoption, data migration, and maintaining personalized donor engagement remain important considerations.

Critical Success Factors for the Donor Gift Cycle

Three critical success factors (CSFs) directly impact the effectiveness of LSU's donor gift cycle. These CSFs are essential for fulfilling LSU's mission of building philanthropic partnerships that advance LSU's academic priorities. The following CSFs are not only vital for success but are also measurable and actively monitored using internal tools and platforms.

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Data Accuracy & Timeliness: Accurate and current donor information is essential for successful effective donor relationship management throughout the gift cycle. This includes contact details, giving history, communication preferences, and engagement notes. Inaccuracies can lead to missed outreach opportunities or reputational damage. LSUF tracks the volume and type of data update requests submitted through JSM. Ad-hoc queries in BBCRM are also used to audit data completeness and flag inconsistencies. High-quality data supports effective communication and LSUF's goal of donor trust and engagement.

Donor Segmentation & Outreach Effectiveness: Managing donor portfolios effectively means DO's can focus on the right donors at the right time, using criteria like giving history, interests, and past engagement. When portfolios are well-structured, outreach becomes more intentional and personal. Progress is measured using metrics like the number of active prospects, contact frequency, stage movement, and closed gifts, all tracked in BBCRM and PBI. These insights help evaluate individual performance and overall fundraising progress. This success factor supports long-term growth by making sure efforts are consistent, donor-focused, and aligned with fundraising goals.

Stewardship Completion & Satisfaction: Effective stewardship, including thanking donors, updating them on impact, and maintaining regular touchpoints, is critical for encouraging repeat giving and fostering long-term relationships. LSUF monitors interaction input and quality through PBI dashboards populated with BBCRM data. The volume and type of completed interactions within set timeframes are closely

tracked. Stewardship directly reflects LSUF's mission of relationship-building and donor appreciation, reinforcing credibility and long-term support for LSU's academic initiatives.

Infrastructure and Architecture of the Donor Gift Cycle

LSUF manages its donor gift cycle using a centralized information system that supports the intake, processing, and stewardship of charitable contributions.

Constituents can donate online or submit gifts by cash, check, or ACH wire transfer.

Once received, contributions are routed to the Gift Processing department and recorded in BBCRM, LSUF's primary donor database (LSU Foundation, n.d.). The system runs on dedicated servers maintained by LSU's IT infrastructure, with access available both on-site and remotely through a secure virtual private network (VPN). Teams across Development, Donor Relations, and Finance share network access, which allows for real-time collaboration and record updates.

BBCRM is integrated with LSU's enterprise financial platform, Workday. Within Workday, "Basic Gift accounts" are regularly monitored and reconciled (Louisiana State University Office of Finance and Administration, n.d.). Once donations are recorded, the system generates automated receipts, applies fund-specific codes, and initiates monthly reimbursements to university accounts. Because gift intake and system access depend on digital forms and online connectivity, reliable internet access is an essential component of this infrastructure.

Information Management Issues

LSUF's information technology (IT) function is supported by an internal team led by Michael McCarty, Director of Information and Technology Services. This team is responsible for core infrastructure, systems access, and helpdesk support. While there is a centralized IT department, platform oversight for BBCRM, JSM, and Microsoft 365 is often shared with individual departments. This hybrid model allows departments to align technology usage with specific operational needs (A. Jones, personal communication, July 21, 2025).

Routine IT issues are handled in-house through JSM. For matters involving LSU-managed systems or devices, LSU collaborates with the university's central ITS using a separate instance of JSM. Software upgrades and maintenance vary by platform: general infrastructure updates are handled by the internal IT team, while platform-specific updates are coordinated with vendors and departmental stakeholders, typically on a quarterly basis or in response to security requirements. Additionally, LSU relies on departmental "power users" who, while not formal IT personnel, provide specialized knowledge, assist with training, and ensure continuity of support (A. Jones, personal communication, July 21, 2025).

The Supply Chain

Upstream Inputs

LSUF's "raw material" is data that comes from two main sources. External vendors such as Windfall and LexisNexis deliver capacity scores, wealth indicators, and philanthropic interests. LSU supplies alumni, parent, and student records plus unit

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funding priorities. Bio & Gift Records (BGR) uploads and cleans these files in BBCRM, and Prospect Research (PR) assigns qualified names to DO's for cultivation.

Internal Conversion

Once a DO secures a commitment, Legal drafts the gift agreement and BGR posts it in BBCRM. Workday handles ledger entries and monthly reconciliation with LSU's finance office. Funds move electronically from the donor's bank to LSUF-controlled accounts, then to the designated fund. Information flows in parallel: every touchpoint is logged in BBCRM and displayed through PBI dashboards, letting Prospect Management (PM) trigger "sprints" when activity slows.

Downstream Customers

LSUF serves two customer groups. Primary customers are donors who expect prompt receipts, impact stories, and ongoing stewardship. Secondary customers are the colleges, units, and students that count on reliable fund transfers. All gifts receive receipts within two weeks; larger gifts may prompt tailored reports or event invitations. Workday pushes funds to unit accounts monthly, giving deans predictable cash flow for programs and scholarships.

Flow Summary

- **Product:** donor data → funded projects, scholarships, capital builds.
- **Information:** vendor + LSU records → BBCRM → PBI for real-time tracking.
- **Money:** donor accounts → LSUF bank → Workday fund → unit budgets.

Emerging Trends

Crowdfunding platforms let smaller projects bypass LSUF, raising pressure to prove value in stewardship, compliance, and impact reporting. Simultaneously, AI-driven prospect scoring offers faster pipeline growth but heightens data-privacy concerns. LSUF's integrated BBCRM–Workday stack remains a competitive edge; staying ahead will require early adoption of predictive tools and deeper fund-level reporting to meet rising donor expectations.

Porter's Competitive Forces & Generic Response Strategies

Rivalry Among Existing Competitors

LSUF competes for donor attention with multiple LSU-affiliated entities (TAF, LSUAA, LSUHS) and with regional peers such as Tulane and Alabama. National giving to higher education fell 2.5 percent in FY 2023, while only 14 percent of 2024 charitable dollars went to education (CASE, 2025). LSUF felt this dip in their FY 2024 revenue after experiencing growth in the years prior. Tightening dollars and overlapping campus appeals make rivalry high. In response to this, LSUF differentiates through publishing detailed impact reports, coordinated cross-unit campaigns, and unit-specific acknowledgments to reduce donor fatigue and reinforce value.

Threat of New Entrants

Crowdfunding platforms and peer-to-peer apps have lowered the bar for launching a fundraising campaign, but the threat they pose to LSUF remains moderate. The Foundation already runs Launch LSU, its own branded platform that delivers the grassroots ease donors expect while keeping stewardship and tax receipting under

LSUF control. Outside the university, GoFundMe and similar sites offer equally simple pathways, and their growing volume shows that small donors are comfortable backing projects with little formal oversight. These trends press LSU to double down on its value proposition: clear stewardship, rigorous financial transparency, and demonstrated long-term impact, all of which will be critical for retaining small and mid-level donors who now have more choices than ever.

Bargaining Power of Donors

The bargaining power of donors is high due to heightened expectations around transparency, personalization, and measurable impact. As Dean van Leeuwen notes, competitive advantage depends on forming “meaningful, emotional connections” (Buck, n.d., p. 2), making this engagement vital to LSU’s long-term sustainability. According to Buck (n.d.), a 2024 Accenture survey found 44 percent of donors would give 10 percent more if the experience felt personalized. LSU responds to this need by investing in segmented messaging, responsive stewardship, and timely updates. Additionally, Giving Day enables donors to contribute directly to 150+ projects across LSU, demonstrating efforts to align with donor preferences. An internal “cost-of-a-donor” initiative is under way to analyze the cost of a donor (A. Jones, personal communication, August 2, 2025), signaling awareness of the evolving philanthropic landscape.

Bargaining Power of Suppliers

For LSU, the most critical suppliers are tech vendors. The Foundation is heavily reliant on BBCRM, the CRM of choice for over “35,000 social good organizations,”

including nearly half of U.S. higher education institutions (Blackbaud, 2024). The system acts as the backbone for prospect tracking, gift processing, and day-to-day engagement. R. Pitre (2025) mentioned that the 2023 migration to BBCRM required several months of coordinated setup and training, emphasizing high switching costs and the vendor's moderate leverage. LSUF reduces risk with multi-year contracts, sandbox testing before upgrades, and in-house "power users" who handle custom configuration. Supplier power remains moderate, and LSUF continually evaluates alternative solutions to maintain future negotiating room.

Threat of Substitutes

LSUF's primary substitutes are alternative giving channels, like GoFundMe, GiveCampus, and grassroot campaigns that promise donors a faster, more emotionally driven experience. These options trade formal oversight for immediacy and emotional resonance, qualities that smaller donors increasingly value. Even Launch LSU, the Foundation's own crowdfunding tool, competes on these same expectations. Some competitors may have more advanced donor scoring algorithms or customized fundraising portals (R. Pitre, personal communication, August 2, 2025), suggesting that innovation in user experience is happening outside traditional advancement structures. To encourage donor loyalty and remain the preferred channel for philanthropic engagement, LSUF must proactively emphasize transparency and impact through fund-use reports, scholarship-success videos, and monthly fund transfers that let units utilize funds quickly.

LSU Foundation Porter's 5 Forces Assessment

The LSU Foundation operates in a diverse philanthropic environment shaped by both internal and external pressures. The most significant force is the high level of internal rivalry across LSU's own fundraising entities. Donor power is also strong, driven by rising expectations for personalization and digital convenience. While new entrants and substitutes present moderate threats, their influence is growing as technology lowers barriers to giving. On the supplier side, LSU's reliance on Blackbaud creates moderate dependency, with recent adoption making switching costly. To stay competitive, LSU must continue improving donor experience, streamlining internal messaging, and ensuring its technology strategy supports its position across these forces.



Figure 7

LSU Foundation Porter's 5 Forces Assessment

Value Chain Analysis

Secondary Activities

BBCRM, JSM, Workday, and PBI form a spine that keeps Finance, Development, and ITS teams in sync. A small ITS crew and unit “power users” handle patches, training, and quick tasks like auto-generated prospect assignment tickets. Multi-year BBCRM contracts ensure reliability, while third-party vendors provide current data. Together, these supports add value by speeding up donor gift cycles, maintaining compliance, and freeing time for staff to focus on donors.

Donor Procurement (Pipeline Building)

The Prospect Strategy team uses Windfall, LexisNexis, and BBCRM analytics to identify donors who show both capacity and affinity for LSU. Qualified prospects are routed into DO's portfolios with recommended next steps. This adds value by ensuring the development team spends its time on the most viable relationships.

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Inbound Logistics (Gift Intake)

After a DO obtains a verbal commitment from a donor, the Legal team drafts the gift agreement and Bio & Gift Records (BGR) records the transaction in BBCRM. Accurate coding at this stage adds value by preventing downstream corrections and expediting the transfer of funds to the appropriate accounts. Although LSU does not currently track cycle time for this step, monitoring the time lapsed from “agreement signed” to “gift posted” would underscore efficiency gains.

Operations (Gift Processing)

After being recorded in BBCRM, gifts transition to Workday for accounting (i.e. general-ledger entries, compliance checks, monthly reconciliations) with LSU’s finance office. Reliable back-office handling protects LSU’s reputation and donor trust, adding value.

Outbound Logistics (Acknowledgement & Gift Application)

Once recorded in BBCRM, receipts are instantly issued for online gifts. Physical gifts receive a receipt once they are received and entered into the system. LSU coordinates with leadership and academic units to personalize thank-you letters or emails. Larger gifts, like funding a new building, may include tailored stewardship such as naming opportunities or event invitations. LSU aims to acknowledge all gifts within 2 weeks, but this metric is not tracked.

Marketing & Fundraising (Communications & Relationship Management)

DO’s manage assigned portfolios in BBCRM where they are expected to log every call, visit, and proposal stage. PM reviews activity weekly, adjusting strategies or

launching targeted contact “sprints” when gaps are identified. For example, PM recently introduced a sprint encouraging DO’s to call donors who hadn’t been contacted within the past six months. PBI dashboards help track sprints and KPIs like dollars raised, asks made, and donor visits, ensuring the team is on track to meet fundraising goals.

Service (Stewardship)

Following the initial acknowledgement, DO’s and the Stewardship team maintain regular touchpoints with donors depending on their giving level. For example, some donors may receive scholarship impact reports if they supported a scholarship or a football game invitation if they made a gift over 100 thousand dollars. Each interaction is logged in BBCRM so future DO’s have a holistic view of each donor. Metrics tracking renewals, upgrades, and number of completed interactions add value by keeping portfolios warm and ensuring donors do not fall through the cracks.

Together, these nine activities form LSUF’s donor value chain, shown in Figure 8.

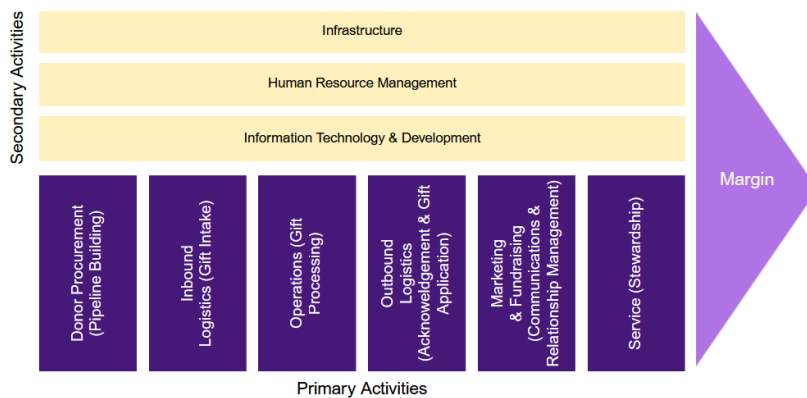


Figure 8

Value Chain Diagram for LSUF

Focal IS Fit with Supply Chain Management

LSUF's focal IS (BBCRM, Workday, PBI, JSM stack) anchors the "supply chain," improving how information and money move from upstream source (external data vendors and SU constituent feeds), through internal conversion (Legal, BGR, Finance), to downstream customers (donors, campus partners). BBCRM standardizes and enriches prospect and gift data so DOs work from a single source of truth. Workday executes ledger entries and monthly fund transfers that can be audited. PBI provides real-time visibility into the health of the donor cycle. JSM captures changes in data quality and workflow enhancements. Together, these tools shorten the donor gift cycle, reduce rework, and create predictable cash flows for units.

Inventory Forecasting & Inventory Control

The stack materially improves "inventory" control and forecasting. In this context, "inventory" is the donor pipeline and available funds. BBCRM tracks each donor through stages of the donor gift cycle to determine potential gaps in revenue, ensure goal alignment, and increase donor retention. BBCRM houses external vendor information to help DOs prioritize prospects based on the probability of giving. This forecasting capability allows LSU to be more efficient and predict fund availability (Farrokhvar et al., 2018).

Emerging Trends & the Competitive Landscape

The current system already supports emerging crowdfunding trends through LaunchLSU and sustains personalized stewardship in BBCRM through segmented journeys, automated receipting, and impact reporting. Across higher education,

AI-assisted prospecting is accelerating pipeline development, but it also raises concerns around consent and transparency. LSUF addresses these risks through periodic data-integrity reviews and clear ownership of what data is collected, why, and for how long.

Some competitive peer institutions rely on more expensive and resource-intensive tools like Salesforce for donor prospecting and forecasting needs through native AI tools (CRM in Higher Education: A Complete Guide, n.d.). LSUF's BBCRM approach may be less flexible, but is more cost-effective and sustainable, meeting downstream needs without the heavy IT support needed for more customized systems. LSUF can always expand analytics and prospecting needs by building PBI dashboards using BBCRM data.

Focal IS Fit with Porter's Forces Model & Generic Competitive Strategies

Rivalry Among Existing Competitors

The focal IS directly mitigates competitive rivalry by allowing LSUF to publish donor-specific impact reports, advertise across different campaigns, and personalize acknowledgements made possible by BBCRM. While other LSU affiliated foundations and local peers may compete for the same donor base, the IS stack supports a focus-differentiation strategy by reinforcing LSUF's unique value to donors and also decreasing fatigue through targeted communications. Tracking visits, asks, and funds secured in PBI enables weekly PM adjustments and targeted "sprints," turning data into timely action.

Threat of New Entrants

Crowdfunding platforms and peer-to-peer applications lower barriers to entry in fundraising. BBCRM helps counter this threat by ensuring control over stewardship and compliance while offering donors modern convenience through Launch LSU. By using PBI data modeling and centralized donor data, LSUF strengthens donor loyalty and increases switching costs. This positioning shows a differentiation strategy, appealing to donors who value trust and transparency over less regulated alternatives.

Bargaining Power of Donors

Donors power is high due because expectations have shifted toward personalized experiences and proof of impact (*Brueckman & Brueckman, 2025*). The BBCRM-Workday stack reduces donor power by delivering faster receipts, fund-level reporting, and providing a single source of truth throughout staff turnover. Strategically, LSUF follows a focus-differentiation strategy by proposing highly personalized donor journeys while maintaining efficiency through automation.

Bargaining Power of Suppliers

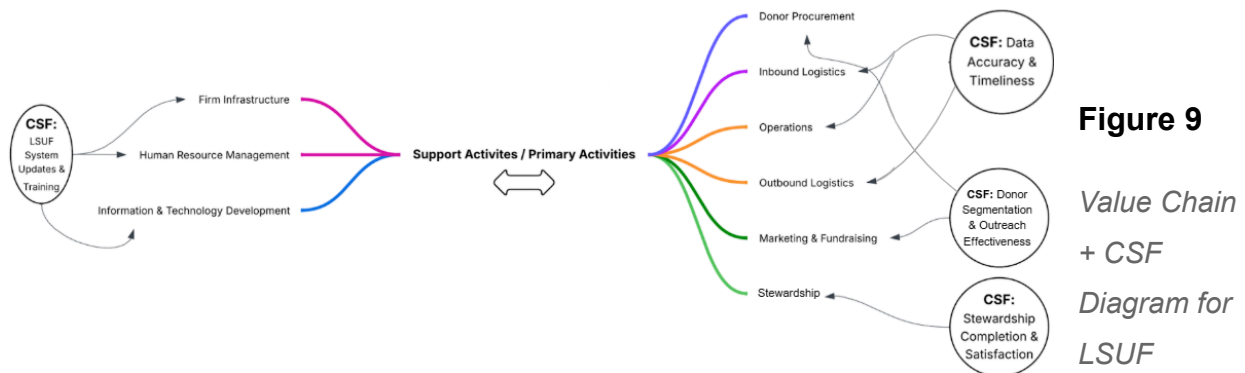
Suppliers like Blackbaud have moderate leverage due to high switching costs. LSUF lowers this supplier power by ensuring in-house expertise and by using sandbox testing for new modules. Additionally, multi-year contracts and specialized training for internal users limit vendor leverage. This method allies with a cost leadership strategy by lowering the switching risks and managing long-term expenses, while continuing essential donor-facing processes.

Threat of Substitutes

Giving channels like GoFundMe, GiveCampus, and grassroots campaigns offer donors closeness and emotional resonance. LSU's IS supported processes affect this threat by adding formal oversight with transparency and regular storytelling. BBCRM combines data across campaigns, making sure a stewardship experience that substitutes can't be easily replicated. This supports a differentiation strategy because LSU leverages institutional trust, financial transparency, and personalized communication to keep the option preferred for philanthropy.

Focal is Fit with Value Chain and CSFs

Based on LSU's value chain, Figure 9 demonstrates how the focal IS adds marginal value and ties directly into the three CSFs previously identified: Data Accuracy & Timeliness, Donor Segmentation & Outreach Effectiveness, and Stewardship Completion & Satisfaction.



Donor Procurement (Pipeline Building): BBCRM uses third-party vendor data to identify high-capacity prospects and route them into DO portfolios. It aligns with the Donor Segmentation CSF by helping development officers to focus on the right donors

efficiently and can be measured by tracking active prospects per DO, stage distribution, and pipeline progression measured in PBI.

Inbound Logistics & Operations (Gift Intake & Gift Processing): Add value by enhancing data accuracy and timeliness. Jira “allows for real time reporting and tracking,” (LSU Foundation, n.d.), while Workday supports accounting. Together, they support the Data Accuracy & Timeliness CSF by efficiently processing and tracking gift agreements.

Outbound Logistics (Acknowledgement & Gift Applications): Automated receipts, personalized acknowledgments, and timely fund transfers support the Timeliness CSF by ensuring receipt time is within 48h for online gifts or 10 business days for offline gifts. The value is added in a faster donor cycle and predictable cashflow to campus partners.

Marketing and Fundraising (Communications & Relationship Management): Consistent engagement at scale with donors through visits, proposals, and sprints logged through BBCRM add value. The Donor Segmentation CSF is supported and measured with the help of PBI through the total number of interactions, visits, and donations secured.

Stewardship: Ensuring all donors feel appreciated through impact reports, event invitations, and personalized acknowledgments adds value by increasing renewals and gift amounts. The Stewardship CSF is measured through renewal and upgrade rates, and donor engagement through PBI dashboards and BBCRM reporting.

Secondary Activities (Infrastructure, HR, Tech, Procurement): Value is added by ensuring fewer errors are produced through effective training, faster enhancements

are implemented by IT, and infrastructure allows for resilience. These activities support all CSF's and are measured through data integrity audits and user-adoption rates in PBI and BBCRM.

Conclusions and Recommendations for the Future

LSUF's technology strategy is focused and adaptive, built to strengthen donor relationships and steward gifts that fuel LSU's future. An integrated stack places BBCRM at the center, linked to finance, analytics, and communication platforms. Together, these systems enable staff to track gifts, engage donors, and measure impact with precision.

Several key lessons emerged throughout our analysis of LSUF. First, technology alone does not guarantee success; without training and change management, systems like BBCRM and Workday can fall short of their potential. Second, cross-department alignment is critical, since data quality and process directly influence fundraising outcomes. Finally, innovation in donor engagement is essential as competition extends beyond higher education into a diverse philanthropic marketplace.

Based on these lessons, our team recommend the following actions:

Sustain Training and Change Management Efforts: Strengthen tech adoption practices through continuous training, integration, and accountability. Make training continuous (onboarding + quarterly refreshers), role-based, and tied to adoption KPIs

(e.g., interaction logging compliance, proposal stage hygiene). Publish team-level adoption dashboards to normalize expectations.

Strengthen Analytical Capabilities: Enhance strategy by exploring advanced capabilities such as AI-driven predictive models to anticipate donor behavior and optimize engagement strategies. This shift allows LSUF to move beyond reactive analysis toward proactive donor stewardship.

Maximize Utilization of Current Systems: Ensure consistent integration and use across departments to protect investments and generate long-term returns in efficiency, accuracy, and donor satisfaction.

Expand Donor Engagement Channels: Meet donors where they are by pairing LaunchLSU with BBCRM-tracked stewardship. Test different outreach cadences and types of content and capture that data in BBCRM to refine segments. This cements LSUF's differentiation while addressing competitive pressures.

Together, these recommendations emphasize LSUF's current strengths while creating a path toward innovation. By committing to continuous improvement, advanced analytics, and system utilization, and embracing adaptability through predictive insight, digital outreach, and cross-unit collaboration, LSUF can sustain donor confidence and drive lasting impact.

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ASSETS

	<u>2024</u>	<u>2023</u>
<u>CURRENT ASSETS</u>		
Cash and cash equivalents	\$ 39,217,997	\$ 27,795,841
Restricted cash	27,014,009	102,827,727
Accrued interest receivable	1,945,989	686,720
Accounts receivable, net	2,080,880	1,263,112
Current portion of unconditional promises to give, net	30,445,451	25,235,987
Other current assets	353,955	141,635
Total current assets	<u>101,058,281</u>	<u>157,951,022</u>
<u>NONCURRENT ASSETS</u>		
Restricted assets:		
Investments	767,851,863	667,094,972
Assets held in split-interest agreements	2,384,586	2,410,285
Beneficial interest in split-interest agreements	2,813,046	2,655,482
Investment in partnership	11,309,353	11,797,005
Unconditional promises to give, net	42,738,629	39,962,901
Property and equipment, net	55,688,641	38,765,291
Right of use asset	149,575	169,338
Other noncurrent assets	1,231,958	1,118,546
Total noncurrent assets	<u>884,167,651</u>	<u>763,973,820</u>
Total Assets	\$ 985,225,932	\$ 921,924,842

Figure 1

Total assets for years 2023/2024

	<u>2024</u>	<u>2023</u>
<u>NET ASSETS</u>		
Without donor restrictions	81,644,337	60,655,285
With donor restrictions	<u>732,793,827</u>	<u>701,419,284</u>
Total net assets	<u>814,438,164</u>	<u>762,074,569</u>

Figure 2

Total net assets for years 2023/2024

	<u>2024</u>	<u>2023</u>
<u>CURRENT LIABILITIES</u>		
Accounts payable and accrued liabilities	\$ 14,763,746	\$ 5,690,719
Current portion of funds held in custody for others	18,009,794	19,758,286
Compensated absences payable and other payroll liabil	601,168	556,623
Current portion of notes payable	529,452	519,557
Current portion operating lease liability	23,667	23,667
Total current liabilities	<u>33,927,827</u>	<u>26,548,852</u>
<u>NONCURRENT LIABILITIES</u>		
Funds held in custody for others, net of current portion	122,443,962	119,009,785
Refundable advances	1,825,894	1,164,277
Operating lease liability, less current portion	119,352	139,115
Notes payable, less current portion	12,470,733	12,988,244
Total noncurrent liabilities	<u>136,859,941</u>	<u>133,301,421</u>
Total liabilities	<u>170,787,768</u>	<u>159,850,273</u>

Figure 3

Total liabilities for years 2023/2024

	<u>2024</u>	<u>2023</u>
Government agency obligations	\$ 144,805,150	\$ 84,357,551
Corporate obligations	4,764,678	16,169,078
Common stocks	7,983,365	6,101,765
Mutual funds	200,846,329	172,807,090
Commingled funds	119,697,077	127,828,215
Hedge funds	140,505,730	118,781,899
Municipal obligations	1,610,998	3,063,289
Private equity	111,164,781	105,008,427
Separately managed accounts	36,319,672	32,823,574
Royalty interests	154,083	154,084
	<u>\$ 767,851,863</u>	<u>\$ 667,094,972</u>

Figure 4

Total investments for years 2023/2024

TIGER ATHLETIC FOUNDATION

<u>NET ASSETS</u>	<u>2023</u>	<u>2022</u>
Without donor restrictions		
Undesignated	161,130,010	133,156,257
Designated by the Board for operating reserves	73,811,068	65,014,740
	<u>234,941,078</u>	<u>198,170,997</u>
With donor restrictions	<u>75,787,422</u>	<u>75,441,403</u>
Total net assets	<u>310,728,500</u>	<u>273,612,400</u>

Figure 5

TAF total net assets for years 2023/2024

LSU HEALTH FOUNDATION, NEW ORLEANS

	<u>2024</u>	<u>2023</u>
Net Assets	20,047,854	18,224,893
Without Donor Restrictions	332,243	376,343
Board-Designated		
Total Without Donor Restrictions	20,380,097	18,601,236
With Donor Restrictions	<u>144,304,124</u>	<u>136,353,762</u>
Total Net Assets	<u>164,684,221</u>	<u>154,954,998</u>

Figure 6

LSUHS total net assets for years 2023/2024