

THE DIVISION OF UNIVERSITY ADVANCEMENT

*QUARTERLY REPORT*

PREPARED FOR

WINSTON-SALEM STATE UNIVERSITY

BOARD OF TRUSTEES ADVANCEMENT COMMITTEE

DECEMBER 2014



**BOARD OF TRUSTEES**  
ADVANCEMENT COMMITTEE MEETING  
THURSDAY, DECEMBER 18, 2014 – 2:00 P.M. TO 3:00 P.M.  
BLAIR HALL CONFERENCE ROOM 308

**\* Action Item**

- |  |                            |
|--|----------------------------|
| 1. Call to Order                                   | Mrs. Sue Henderson, Chair  |
| 2. Roll Call                                       | Ms. Dionne Evans, Recorder |
| 3. Approval of Today's Meeting Agenda*             | Mrs. Henderson             |
| 4. Approval of September 18, 2014 Meeting Minutes* | Mrs. Henderson             |
| 5. Gift Summary Report                             | Mrs. Cook                  |
| i. For the Quarter ended September 30, 2014        |                            |
| ii. Five-Year Review of Advancement Activity       |                            |
| 6. Divisional Highlights                           | Advancement Staff          |
| 7. New Business                                    | Mrs. Henderson             |
| 8. Adjournment                                     | Mrs. Henderson             |

**ABOUT UNIVERSITY ADVANCEMENT...**

*The Winston-Salem State University Advancement Division cultivates and maintains enduring relationships between its many constituencies and the university. We work with our alumni, friends, students, parents, faculty, staff, community members, and foundation and corporate partners to enrich our university and the lives of our students. University Advancement shares a collective responsibility for creating partnerships and experiences across the university, the community, and beyond.*

**NEXT ADVANCEMENT COMMITTEE MEETING**  
**THURSDAY, MARCH 19, 2015 – 2:00 P.M. TO 3:00 P.M.**

## GIFT SUMMARY REPORT

### **For the Period Ending September 30, 2014**

(Compares July 1, 2013 – September 30, 2013 to July 1, 2014 – September 30, 2014)

<b>Gift Summary by Source</b>	<b>2015 Donors</b>	<b>2014 Donors</b>	<b>Donor % Change</b>	<b>2015 Dollars</b>	<b>2014 Dollars</b>	<b>Dollars % Change</b>
Alumni	446	360	23.9%	\$162,281	\$129,075	25.7%
Corporations	26	31	<b>-16.1%</b>	\$340,600	\$47,192	621.7%
Faculty/Staff	80	88	<b>-9.1%</b>	\$16,323	\$15,815	3.2%
Foundations	6	3	100.0%	\$168,742	\$95,856	76.0%
Friends	89	259	<b>-65.6%</b>	\$181,536	\$33,869	436.0%
Fundraising Consortia	1	1	.0%	\$1,894	\$2,947	<b>-35.7%</b>
Other Organizations	10	14	<b>-28.6%</b>	\$60,472	\$45,561	32.7%
Parents	0	3	<b>-100.0%</b>	\$0	\$120	<b>-100.0%</b>
Religious Organizations	1	4	<b>-75.0%</b>	\$1,500	\$2,140	<b>-29.9%</b>
Students	328	1	*****	\$722	\$100	622.4%
<b>WSSU Foundation Total</b>	<b>987</b>	<b>764</b>	<b>29.2%</b>	<b>\$934,071</b>	<b>\$372,677</b>	<b>150.6%</b>
<b>Sponsored Program Total</b>				<b>\$261,690</b>	<b>\$84,638</b>	
<b>Grand Total:</b>				<b>\$ 1,195,761</b>	<b>\$ 457,315</b>	

## **SECOND QUARTER HIGHLIGHTS:**

- Alumni giving increased almost 26% – from \$129,075 through the second quarter of last year to \$162,281 this year; the number of alumni donors increased 24%
- Year to year support from corporations increased from \$47,192 to \$340,600
- Foundation support increased in both the number of foundations supporting the university and the amount of money invested. Dollars increased 76% while the number of foundation donors doubled
- We continue to grow contributions among those identified as friends of WSSU. Giving increased from \$33,869 last year to \$181,536 this year.
- Investments of note include:
  - A \$10,000 scholarship gift from a board member
  - A \$50,000 commitment for books plus \$5,000 unrestricted from a former board member
  - A \$15,000 estate gift designated for scholarships
  - \$1,900 in State Employee Combined Campaign contributions designated to WSSU
  - \$100,000 for scholarships from the Lettie Pate Whitehead Foundation
  - A \$7,400 gift from Reynolda Rotary Club designated to the Club's scholarship at WSSU
  - A \$15,000 non-endowed scholarship gift from a friend of the university
  - A board member who is giving \$530 each month in support of our students

## **ADVANCEMENT WRITER**

- Completed a brochure for the WSSU Scholars Program.
- Wrote proposal templates for the Scholars Program and Bridge Funding for Under-performing endowments.
- Submitted a proposal for the HBCU Internship Program sponsored by UNCGA—\$318,000 divided among four campuses (two public and two private) for internships across the State of North Carolina.
- Wrote a proposal for the Black Philanthropy Initiative to support the Center for Mathematics, Science and Technology Education Summer Scholars Program.
- Worked with Denise Johnson to write a proposal for Girls Empowered by Math and Science for the GlaxoSmithKline Ribbon of Hope grant.
- Collaborating with Alumni Relations to develop plans for 25<sup>th</sup> Class Reunions.
- Creating a workshop that Advancement will present to advisory boards and committees from across the campus.

## **ALUMNI RELATIONS**

### **INFORMED AND ENGAGED ALUMNI**

- Managed fall segment of the 2014-2015 Call Program. To date:
  - Number of Pledges – 854
  - Amount Pledged – \$114,875
  - Number of current donors – 319
  - Total Amount Received – \$32,024

### **OUTREACH**

- Young Alumni Council
  - Continued coordination of 40 under 40 Award Program and Race scheduled for April 2015
  - Secured venue for 5K Race
  - Developed plans for on-line giving solicitation to boost fiscal year-end giving
- Social Media
  - Utilized Meltwater news clippings for Twitter distribution
  - Articles included alumni recognition and campus initiatives
  - Total of 646 Followers
- Facebook
  - Total friends to date 1,017
  - Continue to utilize Facebook for announcement purposes
- Student Outreach
  - Presented at the SGA sponsored Town Hall Meeting
  - Continued planning for Student/Alumni mentoring program
- RamBits
  - Serve as Editor for our Alumni e-newsletter
  - Utilized RamBits to publicize university and National Alumni Association sponsored activities
- Class Reunions
  - Assisted in the coordination of the following Class Reunions: 1954, 1964, 1974, 1979, 1984 and 1989
  - Worked with the Office of Career Development Services on Alumni Return to Serve activities
  - Coordinated Class Reunion giving including \$55,000 from the Class of '64 and \$40,000 from the Class of '79
  - Maintained consistent contact with WSSU National Alumni Association

## **ANNUAL FUND**

- Planned & Implemented Homecoming Engagement Events
  - Wells Fargo VIP Breakfast & Parade Viewing - \$5000 sponsorship secured
  - Homecoming Engagement Party –\$2000 sponsorship secured
- Planned and coordinated Text Campaign Initiative for 2014 academic year. Participating units include Athletics, The College, Diggs Gallery, WSNC and the School of Health Sciences
- Coordinating and planning Winston-Salem State’s initial participation in the national “Giving Tuesday” on December 2<sup>nd</sup>

Secured the following gift commitments for gap-funding & new scholarship funds

- \$13,000 from a current scholarship fund donor for gap funding
- \$12,000 for establishment of a new scholarship fund
- \$3,000 annual gift for the C.E. Gaines Endowed Scholarship Fund
- Coordinated donor stewardship activities at home football games
- Completed the fiscal year donor “thank you card” mailing
- Implemented faculty/staff- My Investment, My University email campaign
- Facilitating plans for 2015 CIAA Basketball Tournament events
- Coordinating calendar year end direct mail solicitation for 2014

## **MAJOR AND PLANNED GIFTS**

- Planned Giving website is now live and educating and engaging potential planned gift donors
  - Will be added to WSSU Foundation website and distributed through Rambits and other social media
- Working with prospect research and advancement services to identify alumni with high wealth ratings, and those identified in specific job sectors
- Planning for 2015 Heritage Society Event
- Presented to WSSU Class of 1979 35<sup>th</sup> reunion group and at Brown Alumni Chapter meeting
- Professional Development-attend 2 NC Planned Giving Council Workshops, and Association of Fundraising Professionals meeting
- The Major Gifts Committee is actively identifying potential prospects utilizing our list-
  - 15yr roster of Board of Trustees, Foundation Board, Board of Visitors
  - local individuals with rating capacity of \$250,000 by zip code
  - lapsed donors (2 years)
  - making personal referrals, assisting with introductions, relationship building, ask
- assisting with updating our profiles and attributes on current individuals in our data base on giving capacity and potential interest areas
- All Committee members have committed to hosting Dinner’s with 12/ engagement activities in the 2015 calendar year

## **CORPORATE AND FOUNDATION RELATIONS**

- The second meeting the corporate and foundation relations committee was held in November. Committee reviewed our list of prospects and action steps/progress since September and determined next steps for cultivation and solicitation.

### **Prospects**

- We have developed a list of 180 corporate and foundation prospects.
- We have also identified individuals who know WSSU and can introduce us to potential corporate partners and funders. These individuals will be treated as prospects.

### **Funds raised or committed**

- Kate B. Reynolds Charitable Trust: \$275,000 for Almost Home Scholarship Program.

### **Conversations with and requests submitted to key corporate and foundation prospects**

- Allegacy Federal Credit Union: Three Allegacy representatives visited WSSU and participated in a campus tour and meeting with Provost Allen. Submitted a preliminary request for \$100,000.
- Altria Foundation: Annual request submitted for \$14,000 in support of career development services and computer science.
- Bank of America: Hosted Triad Market President on campus. After a late November conversation to further develop the program, we will ask Bank of America for a contribution to support a Career Development Services program.
- DataMax: \$75,000 request for scholarships pending.
- First Tennessee Bank: Preliminary discussion about additional career development services programs that could be funded by First TN Bank; follow-up discussions scheduled for Nov.
- Glenn Family Foundation: Considering a \$25,000 request for scholarships.
- Hanesbrands: We are working with LaMonica Sloan to develop an expanded Career Awareness Planning Seminar (formerly BEEP) that could attract support from corp. partner Hanesbrands.
- Lettie Pate Whitehead: Submitted request for \$225,000 for scholarships.
- Piedmont Natural Gas Foundation: After submitting a preliminary request, we will host a PNG representative on campus to discuss opportunities for support.
- Richard J. III and Marie Mallouk Reynolds Foundation: Invited to submit a request after conversation with trustee; will submit a request in November.
- Scripps Networks Interactive: Working with a former board member to host Scripps community giving liaison on the WSSU campus to discuss a contribution.
- The Ray Charles Foundation: Working with former Foundation board member to engage Trustees and advance a \$2 million request to The Ray Charles Foundation in support of the Hauser Musical Arts building.