

THE DIVISION OF UNIVERSITY ADVANCEMENT

*QUARTERLY REPORT*

PREPARED FOR

WINSTON-SALEM STATE UNIVERSITY

BOARD OF TRUSTEES ADVANCEMENT COMMITTEE

JUNE 2015



**BOARD OF TRUSTEES  
ADVANCEMENT COMMITTEE MEETING  
THURSDAY JUNE 11, 2015– 2:00 P.M. TO 3:00 P.M.  
BLAIR HALL CONFERENCE ROOM 308**

**AGENDA**

**\* 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 March 19, 2015 Meeting Minutes*                 | Mrs. Henderson             |
| 5. Gift Summary Report<br>For the Quarter Ended March 31, 2015 | Mrs. Cook                  |
| 6. Divisional Fundraising and Engagement Highlights            | Advancement Staff          |
| 7. New Business  | Mrs. Henderson             |
| 8. Adjournment   | Mrs. Henderson             |

NEXT ADVANCEMENT COMMITTEE MEETING  
THURSDAY, SEPTEMBER 17, 2015 – 2:00 P.M. TO 3:00 P.M.

***ABOUT UNIVERSITY ADVANCEMENT...***

*The WSSU Division of University Advancement 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.*

## GIFT SUMMARY REPORT

### **For the Period Ending March 31, 2015**

(Compares July 1, 2013 – March 31, 2014 to July 1, 2014 – March 31, 2015)

<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	1,373	909	51.1%	\$423,615	\$305,807	38.5%
Corporations	84	79	6.3%	\$831,202	\$521,088	59.5%
Faculty/Staff	174	118	47.5%	\$98,184	\$39,272	150.0%
Foundations	11	7	57.1%	\$534,462	\$590,424	-9.5%
Friends	618	514	20.2%	\$292,502	\$240,185	21.8%
Fundraising Consortia	1	1	.0%	\$6,405	\$9,677	-33.8%
Other Organizations	32	34	5.9%	\$170,282	\$65,183	161.2%
Parents	1	4	-75.0%	\$25	\$3,120	-99.2%
Religious Organizations	6	7	-14.3%	\$14,355	\$15,540	-7.6%
Students	331	5	6,520.0%	\$797	\$635	25.6%
<b>Foundation Total</b>	<b>2,631</b>	<b>1,678</b>	<b>56.8%</b>	<b>\$2,371,829</b>	<b>\$1,790,950</b>	<b>32.4%</b>
<b>Sponsored Programs Total as of February 28, 2015</b>				<b>\$289,831</b>	<b>\$894,175</b>	
<b>Grand Total as of March 31, 2015</b>				<b>\$2,661,660</b>	<b>\$2,685,126</b>	

## **DIVISIONAL HIGHLIGHTS**

- For the period, overall contributions increased 32.4% -- from \$305,807 to \$423,615. The number of donors increased nearly 57%.
- Alumni donors and dollars were both up as compared to the same period last year. The number of donors grew from 909 to 1,373, a 51% increase; contributions were at \$423,615, a 38.5% increase.
- Faculty and Staff giving continues to trend upward. The number of donors increased 47.5% -- from 118 to 174 while contributions increased 150%.
- Corporate support increased in both the number of donors and dollars received. Dollars increased 59.5%, from \$521,088 to \$831,202; the number of donors increased 6.3%
- Contributions from those identified as “friends” increased 22%; the number of donors increased from 514 to 618, up 20%.

## **ADVANCEMENT WRITER**

- Wrote thank you letters, scripts and other correspondence for Chancellor Robinson’s special events and presentations.
- Composed Annual Fund and stewardship letters.
- Nominated LaMonica Sloan for the Business Journal “Women in Business” award.
- Wrote/co-wrote proposals for: BB&T Lighthouse Project Proposal, Black Philanthropy Initiative, Flow Companies, GlaxoSmithKline Ribbon of Hope and Piedmont Natural Gas
- Created biography program and script for the “40 under 40” Gala.

## **ALUMNI RELATIONS**

- Call Program
  - Coordinated 60 and 90 Day reminder mailing
  - Coordinated plan for off-site pledge reminder calls and prepared scripts for callers
  - Progress to Date:
    - 1,517 Pledges Received; \$209,772 Pledged
    - 703 Current Donors; \$103,747 Received
- Young Alumni Council
  - Coordinated successful 40 Under 40 Awards Program
  - Managed 5K/10K Race
- Class Reunions
  - Assisting with the following Class Reunions: 1955, 1960, 1965, 1975, 1985, 1990, 1995 and 2005
  - Class Reunion giving totals for FY15 to date - \$96,658
- Other Outreach and Engagement
  - Met with Student Government Association leadership to begin planning for student solicitation
  - Maintained consistent contact with WSSU National Alumni Association
  - Serve as Editor for RamBits, our Alumni e-newsletter
  - Continue to use social media (Facebook and Twitter) to highlight campus events and initiatives and to recognize alumni accomplishments

## **ANNUAL FUND**

- Planned and coordinated 2015 Annual Golf Classic – April 24<sup>th</sup>
  - 164 participants, 39 sponsors, and in-kind sponsorships totaling \$30, 820
  - \$43,836 net cash revenue
  
- Planned and coordinated Faculty/Staff Campaign for 2015 academic year
  - Record level Faculty/Staff giving totals \$109,000 to date an increase of 136%
  - 179 donors to date (highest participation rate ever- 42% increase)
  
- Coordinated Tom Joyner School of the Month Efforts
  - Raised \$10,662 from 29 donors
  - Included 4 Hercules Scholarships for selected students (\$1,500 per student)
  
- Annual Fund and Alumni Relations areas completed two regional alumni receptions with Chancellor Robinson
  - Raleigh, NC-February 6; Wilson, NC – May 1; Winston-Salem & DC/Maryland areas both scheduled for June

## **CORPORATE AND FOUNDATION RELATIONS**

### Almost Home Scholarship Funds Raised

- We received a \$25,000 commitment this past quarter from Richard J. III and Marie Mallouk Reynolds Foundation.
- This brings the total amount of Almost Home scholarship funds raised from corporations and foundations for the 2014-15 FY to \$127,000.

### Outstanding Requests

- Current outstanding requests to corporations and foundations still being considered total approximately \$300,000.
- One example – Johnson Controls Foundation, the charitable giving arm of Johnson Controls and a new prospect for WSSU, is considering a \$50,000 request for STEM scholarships and research.

### Upcoming Requests

- Requests to be submitted over the summer total approximately \$500,000.
- We will work with The College to nominate students and faculty for an Apple/Thurgood Marshall College Fund initiative, an opportunity that could result in a six-figure award if WSSU students, faculty and/or faculty research projects are selected for the program.
- We are identifying and having early conversations with funders who can help think through, develop and hopefully fund the social justice component of WSSU's work.

### Building Relationships to Lay the Groundwork for Future Asks

- We have hosted and continue to host 1:1 meetings with Chancellor Robinson and CEOs and people of influence.
- Plans for the June 4 reception UNC Charlotte Chancellor Philip Dubois will host for Chancellor Robinson have been finalized. We identified about 175 Charlotte-based corporate prospects and friends for this event.
- We are planning local and statewide corporate events such as breakfast briefings – opportunities for CEOs and business leaders to hear from and interact with Chancellor Robinson.

### **MAJOR & PLANNED GIFTS**

- Proposals Submitted (January-April 2015)
  - \$10,000 outright gift, \$100,000 planned gift- Atkins Lecture Series- insurance *pending*
  - \$25,000 planned gift – Endowed Student Athletic Scholarship – insurance *pending*
  - \$25,000 blended gift-cash, stock, matching gift Honorarium Endowed Scholarship *pending*
- Planned Gift Notifications
  - Education- Scholarship \$10,000 Trust Commitment
  - Physical Therapy – Endowed Scholarship – \$25,000 bequest
  - English Department (Not documented)
  - Endowed Scholarship (Not documented)
- Giftlegacy site –
  - Donor Enewsletter-
    - Most visited sites: Donor Stories 69%; Finance News 14%
    - Total emails - 2,720; open rate for April 2015 - 535
  - Advisor Enewsletter
    - Highest visited site - Washington News
    - April total emails 8; open rate (5 out of 8)
    - Email list now totals 41
- Donor Visits - 9 (March-May 2015)
- Planned Gift Marketing Annual Strategy –Donor & Advisor Enewsletter monthly, social media outlet marketing bi weekly, Archway Magazine, Post Card (3x per year focusing on age groups)
- Major Gift Committee
  - Next meeting June 9<sup>th</sup> – scheduling additional engagement activities to open the doors for major gift prospects
  - Dinner with 12 – May 7, 2015 – total of 18 guests