

THE DIVISION OF UNIVERSITY ADVANCEMENT
QUARTERLY REPORT

PREPARED FOR
THE BOARD OF TRUSTEES ADVANCEMENT COMMITTEE
DECEMBER 2017



WSSU

Gift Summary Report

For the Period Ending September 30, 2017

(Compares July 1, 2016 – September 30, 2016 to July 1, 2017 – September 30, 2017)

| Gift Summary by Source | 2018 Donors | 2017 Donors | Donor % Change | 2018 Dollars | 2017 Dollars | Dollars % Change |
|---------------------------|----------------|----------------|----------------------|-------------------|-------------------|------------------------|
| Alumni | 455 | 574 | -20.7% | \$ 164,266 | \$ 192,080 | -14.5% |
| Corporations | 26 | 41 | -36.6% | \$ 86,152 | \$ 175,231 | -50.8% |
| Faculty/Staff | 70 | 72 | -2.8% | \$ 18,850 | \$ 21,303 | -11.5% |
| Foundations | 3 | 4 | -25.0% | \$ 124,951 | \$ 125,624 | -.5% |
| Friends | 152 | 103 | 47.6% | \$ 125,707 | \$ 32,567 | 286.0% |
| Fundraising Consortia | 1 | 1 | .0% | \$ 3,113 | \$ 116 | 2,583.0% |
| Other Organizations | 30 | 6 | 400.0% | \$ 270,781 | \$ 14,004 | 1,833.6% |
| Parents | 1 | 0 | 100.0% | \$ 1,250 | \$ - | 100.0% |
| Students | 5 | 141 | -96.5% | \$ 170 | \$ 1,084 | -84.3% |
| Foundation Total | 743 | 942 | -21.1% | \$ 795,239 | \$ 562,009 | 41.5% |
| Sponsored Programs | | | | \$ 197,188 | \$ 54,085 | 73% |

First Quarter *Divisional Highlights*

- Private gifts up 41.5% over the same period last year
- Over \$60,000 in individual contributions designated to scholarships
- \$13,867 in donor-designated scholarship support from The Winston-Salem Foundation
- \$110,000 scholarship investment from the Lettie Pate Whitehead Foundation
- Approximately \$22,000 in unrestricted gifts

First Quarter *Divisional Highlights* (Continued)

- \$50,000 bequest realized in support of scholarships
- \$50,000 investment from Wells Fargo to the General Scholarship Fund
- Over \$25,000 from the National Alumni Association and chapters designated to scholarships
- \$236,000 pledge payment from TMCF Center for Advancing Opportunity

Q1 Highlights *Alumni Engagement*

- Alumni Engagement website, newsletter, social media, logo, branding and customer service upgraded
- Began enhancing internal processes including data and budget management
- Focused on building connections with staff, faculty and alumni in preexisting networks
 - WSSU National Alumni Association
 - Health Sciences
 - Young Alumni Council and others

Q1 Highlights *Annual Giving*

- Golf Tournament Planning
 - Worked with Foundation committee to begin early advertisement, restructured sponsorship opportunities, mailed save the dates card in September, PA announcements at each home football game.
- Call Program
 - August 27th through September 28th major updates to call scripts, rapport and updates, provided call center incentives.
- 125th Birthday Online Campaign
 - Five day campaign during university's birthday week.

Q1 Highlights *Major and Planned Gifts*

- New Scholarships Established
 - Tommy & Patricia Hickman Endowed Scholarship for STEM & Education \$25,000
 - Roland & Barbara Hayes Scholarship for Education \$25,000
 - Alpha Kappa Alpha Sorority, Inc. added \$10,000 to Endowed Scholarship
- Planned Gifts Website Refresh
- Hosting North Carolina Planned Giving Council meeting at WSSU
- Submitted WSSU Planned Gift report to UNC-GA
 - Reflected over a million dollars received – Securities, Donor Advised Funds, IRAs, Annuities, Insurance, beneficiary designations, realized bequests

Q1 Highlights *Stewardship*

- Conducted review of endowed and non-endowed funds, creating database of scholarship awards based on disciplines (Health Sciences, Education, STEM, etc.)
- Planned and hosted stewardship luncheon with major donors, Chancellor and students who benefitted from donor investments
- Worked closely with Scholarship Task Force (Enrollment Management, Financial Aid, Finance and Administration and Foundation) to insure scholarships were awarded appropriately
- Coordinated development and distribution of Endowment Reports for all endowed fund donors

Looking Ahead *Divisional Priorities*

- Enhance fundraising infrastructure
- Continue to expand fundraising for university priorities
 - Update scholarship case for support
 - Develop HIP case for support/white paper
 - Identify new corporate and foundation funding sources
 - Expand major, principal and leadership gift prospect pools
- Prepare for capital projects feasibility study(ies)

Looking Ahead *Alumni Engagement*

- 2018 chancellor's tour to engage alumni in regional areas
- Increased alumni professional engagement strategy
- Alumni admissions volunteer program restructuring
- Continued leverage of diverse communication channels
- Developing plans to capitalize on high impact moments
 - Orientation
 - Ramdition
 - Senior year gatherings with chapters
 - Commencement
 - Alumni gatherings

Looking Ahead *Annual Giving*

- Faculty/Staff Giving in conjunction with State Employees' Combined Campaign (SECC)
- Giving Tuesday
- LYBUNT (Last Year But Not This Year) mailer
- Thank You/Holiday mailer
- Year-End giving reminder (electronic, social media, newsletters)

Looking Ahead *Major and Planned Gifts*

- NC Gift Planning, LLC
 - UNC- General Administration Shared Services
 - TIAA Kaspick & UNCGA to offer gifts administration services
 - Ability to offer Life Income Gifts
 - Increase planned giving and annual giving
- CIAA Gift Planning Seminar
 - Focus on Life Income Gifts

Looking Ahead *Stewardship*

- Create an “Intentional” Stewardship Program
 - Revise gift acknowledgement process
 - Enhance donor “thank you” process
 - Revise the annual endowment report format
 - Increase the level of communication between donors and scholarship recipients
 - Increase the level of transparency between donors and the Stewardship Office

