

THE DIVISION OF UNIVERSITY ADVANCEMENT
QUARTERLY REPORT

PREPARED FOR
THE BOARD OF TRUSTEES ADVANCEMENT COMMITTEE
MARCH 2018



WINSTON-SALEM STATE UNIVERSITY

WSSU

Gift Summary Report

For the Period Ending December 31, 2017

(Compares July 1, 2016 – December 31, 2016 to July 1, 2017 – December 31, 2017)

Gift Summary by Source	2018 Donors	2017 Donors	Donor % Change	2018 Dollars	2017 Dollars	Dollars % Change
Alumni	899	1,207	-25.5%	\$ 324,774	\$ 464,011	-30.0%
Corporations	46	62	-25.8%	\$ 183,563	\$ 223,091	-17.7%
Faculty/Staff	98	127	-22.8%	\$ 35,077	\$ 49,570	-29.2%
Foundations	7	9	-22.2%	\$ 352,170	\$ 382,714	-8.0%
Friends	266	217	22.6%	\$ 209,683	\$ 199,672	5.0%
Fundraising Consortia	1	2	-50.0%	\$ 5,926	\$ 1,724	243.8%
Other Organizations	47	16	193.8%	\$ 356,762	\$ 79,025	351.5%
Parents	4	5	-20.0%	\$ 5,350	\$ 360	1,386.1%
Religious Organizations	1	1	.0%	\$ 1,575	\$ 4,185	-62.4%
Students	257	145	77.2%	\$ 1,196	\$ 1,231	-2.8%
Foundation Total	1,626	1,791	-9.2%	\$ 1,476,076	\$ 1,405,583	5.0%
Sponsored Programs				\$ 735,388	\$ 132,364	
				\$ 2,211,464	\$ 1,537,947	

Divisional Highlights Q2

- \$25,000 from Reynolds American in honor of the university's 125th Anniversary
- \$55,000 from the WSSU National Alumni Association designated for scholarships
- \$5,000 from Kate B Reynolds Charitable Trust in honor of an alumnus and Foundation Board member
- \$5,000 from First Tennessee designated for scholarships
- \$25,000 restricted pledge payment from an alumnus
- Submitted Lettie Pate Whitehead Foundation scholarship grant request for 2018-2019 academic year.

Divisional Highlights Q2

- \$5,000 in memory of a friend of the university who served on a WSSU Foundation committee
- \$110,00 pledge payment from Lettie Pate Whitehead Foundation for scholarships
- From BOT members:
 - \$5,000 pledge payment for scholarships
 - \$10,000 unrestricted investment
 - \$10,000 stock gift designated for international travel
- \$25,000 pledge payment from BB&T for scholarship in honor of Foundation Board member

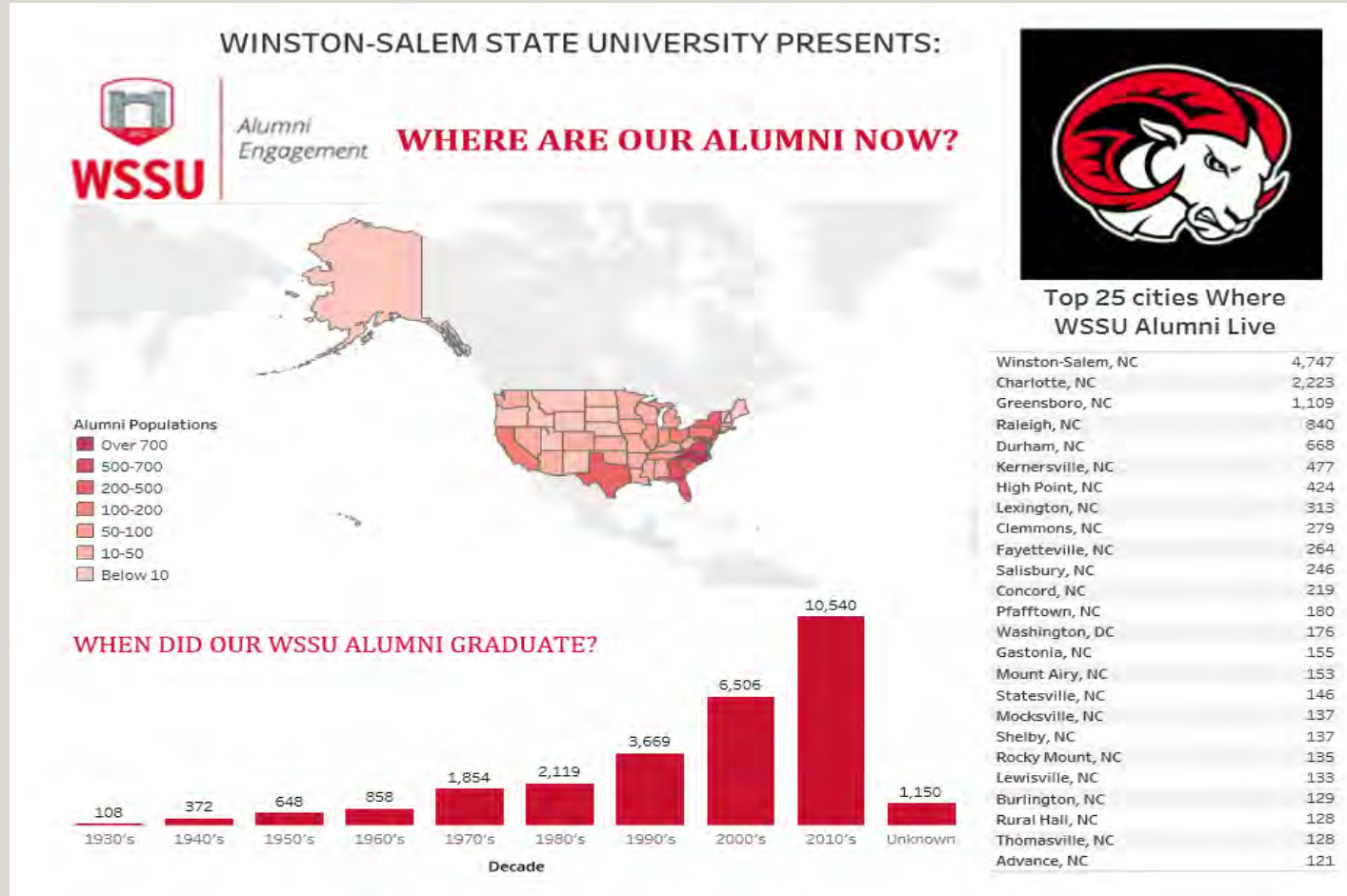
Alumni Engagement Highlights Q1 and Q2

- Alumni Engagement website, newsletter, social media, logo, branding and customer service upgraded ([forms and resources](#)).
- Began enhancing internal processes including data and budget management. Implemented reimbursement procedures.
- Focused on building connections with staff, faculty, corporate partners, donors and alumni in preexisting and new networks on and off campus.
- Implemented new alumni engagement guiding principles – prudently bold, technology and data driven, innovative and intentional, constituent centered and forward thinking.
- Provided extra office space, additional computer, login credentials and phone line to NAA in S.G. Atkins House at no charge.

Alumni Engagement Looking Ahead

- Increased alumni, student and professional engagement strategies.
- Microsoft program in Charlotte on 3/23, student-alumni professional, networking and life skill programs (Bridging the Gap (3/8), Adult for a Day Program with Student Affairs (2/22) and teaching a First Year Experience Course).
- Continued leverage of diverse communication channels to highlight and recognize alumni and their achievements, initiatives and programs and to enhance engagement.
- Capitalize on high impact moments with admissions, athletics, faculty, Ramdition, senior year gatherings with alumni chapters, commencement.
- Building new partnerships with alumni affinity groups.
- Phonathon results – At 50% of FY17 goal. On track to be at or above FY17 in FY18.
- Implement Alumni Attitude Survey and stay focused on building metrics as it relates to programming, regional distribution etc.

Alumni Distribution (27,824) Spring 2018



Annual Giving Highlights Q2

- 2018 WSSU Foundation Annual Golf Tournament
 - Working committee of board members, alumni and staff fully engaged in the planning process:
 - Tournament Date: April 13, 2018
 - *New* Location: Meadowlands Golf Club
 - Sponsorship Solicitation continues; several new sponsors identified
 - Integrated Marketing and Communications

Annual Giving Looking Ahead

- Developing annual giving solicitation schedule for the remainder of the fiscal year
 - Scholarship Appeal in collaboration with the WSSU Foundation Board of Directors
 - Faculty and Staff Appeal
 - SYBUNT Mailer
 - Fiscal year end appeal

Major and Planned Gifts Highlights Q2

- The Diversity and Inclusion Committee of Salemtown Retirement Community (chaired by Dr. Paul Meis, scholarship donor and Dr. Ann Barefield, retired WSSU faculty member) hosted dinner and conversation with Chancellor Robinson on January 16.
- Family Fare Endowed Entrepreneurship Program Fund
 - Corporate investment of \$50,000 with \$50,000 institutional Title III match created to enhance opportunities for students and faculty in the area of entrepreneurship.
- Eleanor Dalton & Michael Williams endowed scholarship \$25,000.
- William B. Glenn/ Hope of Glory Fellowship non-endowed scholarship \$10,000.
- John and Anna Ervin non-endowed Student Development Fund \$5,000.
- Mu Epsilon Chapter of Omega Psi Phi (WSSU Undergraduate) endowed scholarship \$100,000 (pending).
- Chowan County Property Donation – market value \$40,000 (pending).

Major and Planned Gifts Looking Ahead

- Gift Planning Seminar during the CIAA
 - March 3, 2018
 - Sponsored by AXA Advisors
 - Focus on Life Income Gifts
 - Speakers Cynthia Kelley, Financial Advisor and Kinna Clark, UNC System Associate Director of Gift Planning Services

Stewardship Highlights Q2

- Continued development of the “Intentional” Stewardship Program:
- Created “donor acknowledgement” tiers. These tiers will prevent donors from receiving the same thank you letter and give the Stewardship Office the data needed to customize acknowledgements.
- Revised the thank you cards used to acknowledge donations less than \$250.
- Worked closely with donors to resolve issues regarding fund balances and scholarship awards.
- Submitted the Kate B. Reynolds Charitable Trust annual stewardship report. 65 scholarships, between \$200 and \$2,945, were awarded to juniors and seniors, providing the financial assistance needed to complete their studies.
- Continued working with the Office of Scholarships and Financial Aid to award available scholarships.
- Revised Scholarship Awards Process. Document will be shared with the Scholarship Task Force for review and adoption.

Stewardship Looking Ahead

- Implementation of the donor acknowledgement tier system, focusing on first-time alumni, recurring donors and faculty and staff.
- Scholarship Luncheon scheduled for Thursday, April 12, 2018.
- Execution of the revised Scholarship Awards program.
- Development of the 2018 annual endowment report.

Divisional Priorities Looking Ahead

- Work with Academic Affairs to articulate need for private support for strategic priorities
 - *Develop scholarship case for support (define undergraduate and graduate scholarship needs. Where are the gaps? How much funding is needed?)*
 - *Develop High-Impact Practices case for support (what are the programmatic needs? How much funding is needed – short term? long term?)*
- Prepare for capital projects feasibility study(ies)
 - *Hauser Hall for Music*
 - *Physical Plant for Art and Graphic Studies*
 - *FL Atkins expansion for School of Health Sciences*
- Enhance fundraising infrastructure

What Questions May We Answer for You?

