

THE DIVISION OF UNIVERSITY ADVANCEMENT

*QUARTERLY REPORT*

PREPARED FOR

WINSTON-SALEM STATE UNIVERSITY

BOARD OF TRUSTEES ADVANCEMENT COMMITTEE

MARCH 2017



BOARD OF TRUSTEES  
ADVANCEMENT COMMITTEE MEETING  
THURSDAY, MARCH 16, 2017 ♦ 2:00 P.M.  
BLAIR HALL CONFERENCE ROOM 308

**AGENDA**

**\* Action Item**

- |  |                            |
|--|----------------------------|
| 1. Call to Order                                     | Mr. Kelvin Farmer, Chair   |
| 2. Roll Call   | Ms. Dionne Evans, Recorder |
| 3. Approval of Today's Meeting Agenda*               | Mr. Farmer                 |
| 4. Approval of the December 8, 2016 Meeting Minutes* | Mr. Farmer                 |
| 5. Advancement's Strategic Objectives 2016-2021      | Mrs. Michelle Cook         |
| 6. Strategic Accomplishments 2016                    | Advancement Staff          |
| 7. New Business                                      | Mr. Farmer                 |
| 8. Adjournment                                       | Mr. Farmer                 |

NEXT ADVANCEMENT COMMITTEE MEETING  
THURSDAY, JUNE 8, 2017 – 2:00 P.M.

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

*The Division of University Advancement cultivates and maintains enduring relationships between its many constituencies and the university. We work with alumni, friends, students, parents, faculty, staff, community members, and foundation and corporate partners to garner financial and human capital resources that will 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 December 31, 2016*

*(Compares July 1, 2015 – December 31, 2015 to July 1, 2016 – December 31, 2016)*

<b>Gifts by Source</b>	<b>2017 Donors</b>	<b>2016 Donors</b>	<b>Donor % Change</b>	<b>2017 Dollars</b>	<b>2016 Dollars</b>	<b>Dollars % Change</b>
Alumni	780	1,323	-41.0%	\$ 344,083	\$ 356,649	-3.5%
Corporations	51	54	-5.6%	\$ 201,841	\$ 467,829	-56.9%
Faculty/Staff	80	146	-45.2%	\$ 33,135	\$ 69,478	-52.3%
Foundations	7	7	.0%	\$ 144,954	\$ 384,692	-62.3%
Friends	134	352	-61.9%	\$ 123,365	\$ 168,469	-26.8%
Fundraising Consortia	2	3	-33.3%	\$ 1,724	\$ 2,663	-35.3%
Other Organizations	10	30	-66.7%	\$ 77,830	\$ 46,424	67.6%
Parents	0	5	-100.0%	\$ -	\$ 675	-100.0%
Religious Organizations	0	8	-100.0%	\$ -	\$ 45,915	-100.0%
Students	145	277	-47.7%	\$ 1,145	\$ 2,626	-56.4%
<b>Foundation Totals</b>	<b>1,209</b>	<b>2,205</b>	<b>-45.2%</b>	<b>\$ 928,076</b>	<b>\$1,545,420</b>	<b>-39.9%</b>
<b>Sponsored Programs</b>				\$ 132,364	\$ 236,232	
<b>Grand Total</b>				<b>\$ 1,060,440</b>	<b>\$1,781,652</b>	

## **ANNUAL FUND**

- Partnered with Human Resources to conduct three New Employee Orientation Giving Presentations
- Accepted into the CASE Minority Advancement Institute held November 13-15, 2016
- Attended Hands on Northwest “Donor Relations and Communications: What For?” session
- WSNC Fundraising Campaign Collaboration
  - Ongoing discussions and planning with station manager
  - Working with Marketing to target specific listeners
  - On-air campaign 3/3-3/10
- Prepared for leading and launching Spring Call program (Meetings with Ruffalo Noel Levitz Client Director and Call Center Manager)
- 2017 WSSU Foundation Golf Classic
  1. Finalized marketing materials with throwback theme for 125<sup>th</sup> celebration
  2. Presented at Foundation Board meeting
    - a. Received commitments from 12 board members!

## **CORPORATE AND FOUNDATION RELATIONS**

### **Noteworthy Investments & Funding Requests**

- Lettie Pate Whitehead Foundation renewed their investment in scholarships for the upcoming year – increasing their gift from \$205,000 for 2016-2017 to \$220,000 for 2017-2018.
- Islamic Relief USA awarded \$47,000 in support of the School of Health Sciences/Department of Physical Therapy’s continued work at the local Community Care Clinic.
- We are working with the Chancellor and Provost to facilitate a seven-figure gift to WSSU in support of the Center for the Study of Economic Mobility, which will support faculty and undergraduate research, as well as other strategic priorities focused on social justice and community engagement.
- We submitted a \$200,000 request to Wells Fargo in support of the Gap Scholarship Fund, which provides scholarships for underserved and low-income students who are in need of financial assistance to stay on track and graduate.
- We worked with the School of Health Sciences to submit a request to Steelcase for a \$65,000 investment that would allow the university to upgrade classroom space in F.L. Atkins and transform it into an “active learning classroom” – a learning environment that will support high-impact teaching practices and student learning.

### **Corporate Engagement**

- We are working with AT&T executives to launch “AT&T Academy” at WSSU on April 13. AT&T will fund and facilitate this program that will enable WSSU faculty to learn how the essential skills taught at WSSU (e.g. critical thinking, problem solving, and communication skills) are used in careers at corporations like AT&T.
- We hosted a “Breakfast and Conversation with Chancellor Robinson” for Charlotte-area corporate and foundation executives on February 23 and also engaged executives through other meetings and events during CIAA week.

## **MAJOR AND PLANNED GIFTS**

- Received \$20,000 from the estate of Casey Jones '58. The gift will provide four \$5,000 scholarships for Education Majors
- Received \$15,000- towards the Dennis-Stroud Endowed Scholarship – Education Major
- Received commitment of \$20,000 from Alpha Kappa Alpha Sorority, Inc. \$10,000 to WSSU & \$10,000 to a memorial scholarship
- Serving on UNC-GA Advancement Symposium Planning Committee
- Pending Gifts of Insurance - \$10,000 Education Department, & \$25,000 towards Endowed Scholarship
- March 24<sup>th</sup> – AXA Advisors will sponsor 1 of 3 Planned Giving Sessions – Focus on IRA Rollovers and Insurance
- Supporting Alumni Relations 40 Under 40 Scholarship Gala and Class Reunion fundraising

## **UNIVERSITY AND DONOR EVENTS**

- Second Quarter Events

<b>Event</b>	<b>Date</b>
CIAA Board of Directors Meeting	November 30, 2016
WSSU vs. UNC Pembroke – Rams Full Court Hospitality Room	November 30, 2016
WSSU vs. Virginia Union – Rams Full Court Hospitality Room	December 3, 2016
Chancellor's Holiday Open House	December 11, 2016
Heritage Society Dinner & Induction Ceremony	December 13, 2016

- Ongoing Initiatives
  - 125th Anniversary Planning (website, steering committee, etc.)
  - University Events Planning Committee (Homecoming discussion & planning)
  - 25Live Training and Implementation
  - University Events Website