




# Vision 20/20 UPDATE

## Alumni Engagement & Philanthropic Giving

Overall Status







Goal:

Cultivate life-long philanthropy in support of WVSU through programs that educate students, alumni and friends about the importance of philanthropy and provide giving opportunities appropriate for each stage of life.

Strategy:

Educate alumni and friends on planned giving opportunities and personally cultivate planned and estate gifts with individuals as appropriate.

### Recent Key Accomplishments

Presented Planned Giving Options and Legacy Society Information at National Alumni Conference – May 2016

Secured total Planned Gifts of \$ \$3,348,800 beginning July 1, 2010 through June 30, 2016

Held Legacy Society Reception - Homecoming 2016 to promote Planned Giving options for Alumni

### Upcoming Events

Planned Giving Website is being updated and will launch Feb 2017

Planned Giving opportunities will be highlighted at fundraising events, in University Publications and starting in Spring 2017 quarterly emails with launch of new website

A new Estate Planning guide has been developed in support of the planned giving program and will be sent out in spring 2017 in targeted mailing.

### Emerging Issues

Lack of historic culture of philanthropy has resulted in the vast majority of alumni not being in the habit of giving to the Foundation. Thus including the Foundation in their estate plans is a new concept to many.

### Solutions

Continuing strong, consistent educational programs, seminars and discussion around Planned Giving and Estate plan options with prospects and donors

Continuing to promote through mail and email Planned Giving options to prospects and alumni

### Upcoming Deliverable/Milestones

Item	Due Date	Status	Progress	Comments
Launch of New Planned Giving Website	<input type="text" value="03/30/2017"/>	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	<input type="text" value="80"/> %	Currently working with vendor to finalize launch
Email and direct mail promotion of Planned Giving and Estate Plan options to prospects	<input type="text" value="04/30/2017"/>	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	<input type="text" value="50"/> %	Pulling prospect lists to email / mail and contact
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="text"/>	