




Vision 20/20 UPDATE

Alumni Engagement & Philanthropic Giving

Overall Status







Goal:

In partnership with the WVSU Foundation, develop management practices and financial goals to support increased, long-term financial support for the University.

Strategy:

Review and strengthen the Foundation's policies related to gift acceptance, endowment management and reporting.

Recent Key Accomplishments

Reviewed investment policy and adjusted portfolio from 40% fixed/60% stocks to 35% fixed/65% stocks.

Created cash flow report to track income from campaign pledges as well as new commitments.

Upcoming Events

Refining financial reports for Finance & Audit Committee to make them easier to interpret and to support planning.

Developing reports to track fundraising performance in annual giving and major gifts programs.













Emerging Issues

Responsibility to manage National Alumni Association and some chapter funds is creating the need for additional reports for those groups as well as the opportunity for thoughtful planning and collaboration.

Solutions

Standardize reports and collaborate regularly with groups whose funds the Foundation manages.

Upcoming Deliverable/Milestones

| Item | Due Date | Status | Progress | Comments |
|---|---|---|-----------------------------------|----------------------|
| Item: <input type="text" value="Refine financial reports"/> | <input type="text" value="06/30/2017"/> | <input type="radio"/>  <input checked="" type="radio"/>  <input type="radio"/>  | <input type="text" value="60"/> % | <input type="text"/> |
| Item: <input type="text"/> | <input type="text"/> | <input checked="" type="radio"/>  <input type="radio"/>  <input type="radio"/>  | <input type="text"/> % | <input type="text"/> |
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