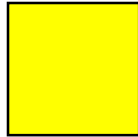


Vision 2020 Update—Alumni Engagement and Philanthropic Giving

Overall Status



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

Recent Key Accomplishments

Published planned giving brochure spring 2014 and launched planned giving website fall 2014. Conducted three planned giving seminars thus far in FY 2015.

Strengthened stewardship of Legacy Society with recognition events and gifts.

Secured \$598,000 in planned gift commitments during FY 2014 and \$1,875,000 thus far in FY 2015.

Upcoming Activities

Plaque being developed to recognize realized bequests and other types of planned gifts. It will be displayed in the Erickson Alumni Center.

Planned giving opportunities will be highlighted in Campaign events and announcements.

Planned giving newsletter will be initiated.

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

Strong, consistent educational program.

Persistent story telling about the impact of planned gifts to inspire others. Include donor stories on planned giving website.

Upcoming Deliverables/Milestones

<u>Item</u>	<u>Due Date</u>	<u>Status</u>	<u>Progress</u>	<u>Comments</u>
Item. Plaque recognizing realized planned gifts.	5/1/15		100%	
Item. Planned giving newsletter launched	6/30/15		100%	