

# 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

Conducted seven planned giving seminars in fiscal year 2015. Strengthened stewardship of Legacy Society with recognition events and gifts.

Secured \$598,000 in planned gift commitments during fiscal year 2014 and \$2,750,000 in fiscal year 2015. Quarterly planned giving emails have been sent to a specific target audience since being launched at the start of fiscal year 2015.

Plaque recognizing realized bequests and other types of planned gifts is now displayed in Erickson Alumni Center.

## Upcoming Activities

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

An estate planning guide is being developed in support of the planned giving program.

Planned giving seminars will continue.

Spring 2016 “Giving Back Project” will highlight the history of African American philanthropy.

## 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.

Inclusion of an estate planning guide in future planned giving discussions.

## 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%	