### 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:
- **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

<table>
<thead>
<tr>
<th>Item</th>
<th>Due Date</th>
<th>Status</th>
<th>Progress</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Item: Launch of New Planned Giving Website</td>
<td>03/30/2017</td>
<td>[ ] [ ] [ ]</td>
<td>80%</td>
<td>Currently working with vendor to finalize launch</td>
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<tr>
<td>Item: Email and direct mail promotion of Planned Giving and Estate Plan options to prospects</td>
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<td>Pulling prospect lists to email / mail and contact</td>
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