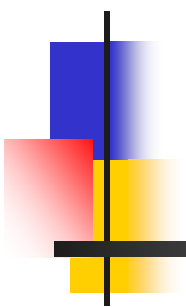


Shepherd University Board of Governors  
October 12, 2006  
Agenda Item No. 7

## **ADVANCEMENT ANNUAL REPORT**

Mrs. Robin Zanotti, Vice President for Advancement, will present and discuss data representing financial and developmental operations. Summary data, Shepherd University Alumni Association, Inc. Financial Statements, and Shepherd University Foundation Audited Financial Statements are included on the following pages.



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**Shepherd  
University  
Advancement and  
Foundation  
Annual Report  
FY06**

## **VSE Comparisons to Mean - Shepherd Competitors and Peer Group FY2005**

<b>Institution</b>	<b>Enrollment Total Headcount</b>	<b>Alumni Participation</b>	<b>Alumni Total Dollars</b>
<b>Shepherd University</b>	3,682	13.50%	\$953,846
<b>Shepherd Competitors and Peer Group</b>	4,621	11.90%	\$999,921

## VSE Enrollment: Total Headcount

### Shepherd Competitors and Peer Group FY2005

1	Salisbury University (Salisbury, MD)	7,009
2	Shippensburg Univ. of Pennsylvania (Shippensburg, PA)	6,579
3	Frostburg State University (Frostburg, MD)	5,083
4	West Virginia State University (Institute, WV)	4,958
5	University of Mary Washington (Fredericksburg, VA)	4,729
6	Longwood University (Farmville, VA)	4,289
7	Shepherd University (Shepherdstown, WV)	3,682
8	North Carolina, Univ. of-Asheville (Asheville, NC)	3,485
9	SUNY-Old Westbury College (Old Westbury, NY)	3,394
10	Shenandoah University (Winchester, VA)	3,000

## VSE Alumni Total Dollars

### Shepherd Competitors and Peer Group FY2005

1	Shippensburg Univ. of Pennsylvania (Shippensburg, PA)	\$3,353,891
2	University of Mary Washington (Fredericksburg, VA)	\$2,466,312
3	Longwood University (Farmville, VA)	\$1,279,480
4	Shepherd University (Shepherdstown, WV)	\$953,846
5	North Carolina, Univ. of-Asheville (Asheville, NC)	\$930,635
6	Salisbury University (Salisbury, MD)	\$467,647
7	Frostburg State University (Frostburg, MD)	\$251,942
8	Shenandoah University (Winchester, VA)	\$170,669
9	West Virginia State University (Institute, WV)	\$104,888
10	SUNY-Old Westbury College (Old Westbury, NY)	\$19,900

## VSE Alumni Participation

### Shepherd Competitors and Peer Group FY2005

1	University of Mary Washington (Fredericksburg, VA)	26.60%
2	Shippensburg Univ. of Pennsylvania (Shippensburg, PA)	23.30%
3	Longwood University (Farmville, VA)	20.00%
4	Shepherd University (Shepherdstown, WV)	13.50%
5	North Carolina, Univ. of-Asheville (Asheville, NC)	9.30%
6	Shenandoah University (Winchester, VA)	7.80%
7	Salisbury University (Salisbury, MD)	7.10%
8	Frostburg State University (Frostburg, MD)	7.00%
9	West Virginia State University (Institute, WV)	2.10%
10	SUNY-Old Westbury College (Old Westbury, NY)	2.00%

## VSE Endowment Market Value

### Shepherd Competitors and Peer Group FY2005

1	Shenandoah University (Winchester, VA)	\$ 42,274,000
2	Longwood University (Farmville, VA)	\$ 35,648,000
3	University of Mary Washington (Fredericksburg, VA)	\$ 24,572,000
4	Shepherd University (Shepherdstown, WV)	\$ 20,385,000
5	Shippensburg Univ. of Pennsylvania (Shippensburg, PA)	\$ 20,293,000
6	Salisbury University (Salisbury, MD)	\$ 17,098,000
7	Frostburg State University (Frostburg, MD)	\$ 8,466,000
8	SUNY-Old Westbury College (Old Westbury, NY)	\$ 182,000



# Capital Campaign-

Joint efforts of Advancement, Foundation, CATF

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- Campaign Planning Study
  - Six Leadership Briefings
  - Fifty interviews
  - Presentation of Findings
- Retreat for Boards
  - Campaign goal approved
  - Campaign priorities approved
  - Training on prospect cultivation
- Campaign budget developed
- Campaign chair and vice chairs recruited
- Campaign communications consultant retained
- Prospects identified and qualified



# Advancement Research

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- Established processes for continuous identification, research and qualification of prospective donors
- Screened 1,200 potential donors for inclination and capacity to give a major gift
- Initiated system to monitor the cultivation and solicitation processes with individual donors and the overall campaign goals
  - Advancement policies and procedures
  - Expansion of the existing fundraising database to include prospects and planned interactions with campaign staff



# Alumni Relations Highlights

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- Thirteen events
  - 3 fundraising events
  - 2 regional receptions
    - Atlanta
    - Shepherdstown
  - 3 new events
    - Zero Reunion – event for graduating seniors
    - Ram Rally – pre-game event for football playoff game
    - '55 Football Team Reunion



## Alumni Relations (cont'd)

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- Membership Drive for the Alumni Association
  - \$33,925 from 1,236 members



# Alumni Relations (cont'd)

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## ■ Alumni Communications Enhancement Initiatives

- Alumni website re-design including
  - ❖ new alumni association page
  - ❖ new annual fund page
- Early planning for online giving and online community solutions in higher education
- New online exit survey for seniors
  - ❖ 25% response rate



# Alumni Relations (cont'd)

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- Alumni/University Relations

Developing alumni  
volunteer programs in

- Admissions recruiting
- Career Services
- Student Affairs
- Athletics



# Alumni Relations (cont'd)

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## ■ Alumni Association

- Staff support and services for all Alumni Association business, communications and events
- Developed orientation program for new board members
- Established, recruited for and staffed standing committees



# Fundraising Highlights

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- Annual Fund

- Developed comprehensive Annual Fund plan
  - targeted specific segments
  - variable solicitations based on giving history



# Fundraising (cont'd)

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- First campus-wide leadership phase
  - 56% participation
    - ❖ Board of Governors - 91%
    - ❖ Executive Staff - 100%
  - \$11,700 in gifts
  - First time donors to the annual fund – 55%
  - Increased gifts from existing donors – 44%
  - Median gift size - \$100



# Fundraising (cont'd)

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- Annual Fund – Alumni phase
  - First time solicitation of all alumni before the end of the tax year
    - ❖ Increase in mail response rate – 40%
    - ❖ Average gift size - increased by \$7



# Fundraising (cont'd)

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## ■ Phonathon

- Numbers of gifts received - decreased by 42%
- Average gift size - increased by 4%



# Fundraising (cont'd)

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- Post Phonathon Mailing

- Mailed to all previous and non-donors

- ❖ Yielded additional 29 gifts averaging \$53.10

- ❖ FY05 yielded additional 85 gifts averaging \$93.94

- ✓ only those who pledged by phone or who we attempted to reach by phone were solicited

- First time Annual Fund Donors

- FY06 – 172

- FY05 – 58



# Fundraising (cont'd)

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- Other fundraising
  - Consolidation of athletic and academic department fundraising into Advancement, Annual Fund program



# Foundation Donor Relations Highlights

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- Ten events: 8 Donor Relations; 2 Fundraising
- ✓ New events
  - ❖ Dinner on the Diamond
  - ❖ Tom E. Moses Constitution Day Lecture Series
- Scarborough Membership Drive
- ✓ 160 members
- ✓ \$25,000 in new grant funds released to library (total through FY06 \$75,000)
- ✓ \$10,000 added to library endowment (total through FY06 \$35,000)



# Foundation Positioning for the Campaign

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## Database Management

- ✓ Developed and implemented protocols for gift data entry and tracking
- ✓ Worked closely with Advancement Research to develop and implement prospect research and tracking protocols

## Reporting

- ✓ Worked with Advancement staff to develop combined philanthropy report for standardized comprehensive campaign reporting
- ✓ Submitted first Voluntary Support for Education Survey for Shepherd University

## Staffing

- ✓ Funded and hired new position, Executive Administrative Assistant to the EVP, to support increased campaign activities

# Shepherd University Philanthropy Report

	Fiscal Year End		Fiscal Year End		Fiscal Year End	
	2006	# Donors	2005	# Donors	2004	# Donors
<b>AA Dues</b>	\$33,925	1236	\$32,560	1410	\$31,673	1398
<b>Annual Giving</b>						
Annual Fund	\$79,487	1345	\$85,040	1450	\$71,106	1254
Scholarships & Programs	\$308,036	370	\$236,173	431	\$195,941	577
Student Athletics	\$154,094	1094	\$200,402	1076	\$133,529	628
<b>Subtotal</b>	\$541,617	2809	\$521,615	2957	\$400,576	2459
<b>Endowments</b>						
Student Endowments	\$429,697	590	\$986,165	560	\$1,972,645	529
Faculty Endowments	\$0	0	\$0	0	\$0	0
<b>Subtotal</b>	\$429,697	590	\$986,165	560	\$1,972,645	529
<b>Center for Contemporary Arts</b>	\$75,000	2	\$0	0	\$0	0
<b>Campaign Restricted</b>	\$0	0	\$0	0	\$0	0
<b>Campaign Unrestricted</b>	\$0	0	\$50,570	4	\$0	0
<b>Total</b>	\$1,080,239	4,637	\$1,590,910	4,931	\$2,404,894	4,386

