

## OFFICE OF ADVANCEMENT ANNUAL REPORT

### Shepherd University Foundation

#### Donor Relations Highlights

- Twenty events that included one fundraising, five recognition, and 14 donor relations and cultivation.
- Scarborough Society included 188 members with \$100,000 total direct grants for library programs through FY08, and \$ 60,000 total endowment through FY08.
- The McMurrin Society exceeded its goal to increase membership with 16 new members during FY08, bringing to a total of 103 members.

#### Goals for FY09 Donor Relations and Cultivation

- Work with comprehensive campaign partners to develop and implement donor aspects of the next phase of leadership gifts.
- Increase awareness of the McMurrin Society and planned gift opportunities to achieve target goal of 10% average annual increase in society membership.

#### Shepherd University Foundation Support for the Comprehensive Campaign

Maintain gift database, gift processing, campaign reporting and accounting systems.

<b>FYE</b>	<b>Direct Funding for Campaign</b>	<b>Database Management Funding</b>	<b>Total</b>
FY 05	\$25,000	\$50,000	\$75,000
FY 06	\$25,000	\$50,000	\$75,000
FY 07	\$25,000	\$50,000	\$75,000
FY 08	\$50,000	\$50,000	\$100,00
FY 09	\$50,000	\$50,000	\$100,00

#### Goals for FY09 Campaign Support

- Proactively support all aspects of the University's comprehensive campaign.
- Maintain funding support of \$100,000 to campaign budget.

## Stewardship of Gifts

Total assets have increased 5.71% to \$24.3 million during FY08.

### Endowments

FY08 Endowments have increased 7.18% since FY 07.

Year	Endowments
FY04	\$15,479,839
FY05	\$16,314,004
FY06	\$16,430,671
FY07	\$17,554,393
FY08	\$18,814,563

### Newly-Established Funds

New endowments established during FY08 increased by 16 and includes:

- one named endowed chair;
- 13 named endowed scholarships; and
- two named program endowments.

For four new annually funded awards:

- two named annually funded scholarships, and
- two named annually funded program award

Shepherd University Foundation				
<b>Scholarships and Program Awards and University Support</b>				
YEAR		Scholarships & Awards	University Support	TOTAL
2008-2009	Budgeted	\$1,332,100	\$191,000	\$1,523,100
2007-2008	Paid Out	\$1,022,672	\$195,016	\$1,217,688
2006-2007	Paid Out	\$879,832	\$182,250	\$1,061,982
2005-2006	Paid Out	\$745,511	\$200,961	\$946,472
2004-2005	Paid Out	\$656,900	\$163,484	\$820,384

### Goals for FY 09 Stewardship of Gifts

- Work with University to establish a written agreement to formalize working relationship.
- Successfully integrate Capital Fiduciary Advisors into our investment management processes and achieve portfolio rebalancing to our investment policy benchmarks by October 30, 2008.
- Continue record of clean annual audit report.
- Continue to provide fiduciary, investment, and full accounting services to the Robert C. Byrd Center for Legislative Studies.

## **Alumni Relations and Annual Fund**

### **Athletic Fundraising**

- Implemented and managed annual fundraising events and direct mail appeals for Shepherd University athletics:
  - three golf tournaments;
  - four direct mail appeals;
  - two dinners; and
  - NFL tickets raffle.
- Gross proceeds raised \$74,000.00 for football, men's basketball, women's basketball, baseball, softball, volleyball, women's soccer.
- Advise and consult with individual coaches about fundraising activities.

### **Goals for FY09 Athletic Fundraising**

- Continue to provide support to coaches in their fundraising activities.
- Explore other opportunities for annual giving to athletics.
- Continue to manage annual fundraising events and appeals.

### **Annual Fund**

Total Raised \$79,014.00 (including Phonathon):

- 1,082 gifts;
- Average gift size \$73.00;
- Phonathon pledges \$35,171.00;
- Phonathon pledges fulfilled \$27,776.00, 75% fulfillment rate;
- 380 gifts;
- average gift size \$73.00.

### **Goals for FY09 Annual Fund**

- Extend solicitation and cycle to include an additional mailing and additional Phonathon.
- Reinstate Shepherd University leadership giving phase.

### **Alumni Relations**

- Planned and implemented 15 events (does not include athletic fundraising events);
  - Four receptions: three in Florida, one in Washington, D.C.;
  - Ram Rally pre-game hospitality event for football NCAA Division II play-off game hosted by Shepherd University;
  - Ram Gridiron Club Spring Picnic and Club Day Hospitality Tent;
  - Annual Homecoming events including alumni golf tournament (fundraiser for non-revenue sports (not included above), Homecoming Breakfast, Lunch, post-game party, class reunions and 50s reunion brunch;
  - Launched new program for the Emeritus Club reception and luncheon; and
  - Athletic Hall of Fame Banquet and Induction, and plaque unveiling.
- Assisted with the planning and implementation of the Inauguration of Dr. Shipley.

### New Events

- Homecoming: post-game social for Alumni Association members.

### Goals for FY09 Alumni Relations

- New events:
  - Outstanding Alumni awards reception to be held Homecoming weekend;
  - Alumni pre-game picnic at Shippensburg University for first football game.
- Continue Homecoming members' party.
- Continue Homecoming Sunday reunion brunch and campus tour.
- Plan and implement regional receptions in Washington, D.C., Maryland and Virginia.
- Assist as needed with event planning for campaign events.

### Alumni Communications

- Contracted with iModules for "Encompass Constituent Relationship Management" Software to develop, implement and host online community pages for alumni, e-newsletters, e-mail blasts, and online giving capabilities for Shepherd University.
- Work with Alumni Association marketing committee, Office of External Affairs, and the Shepherd University Foundation to develop content and style of pages, and to develop marketing plan for the community and online giving.
- Provide support to academic departments and athletics for communications with alumni.

### Goals for FY09 Alumni Communications

- Launch online community
- Launch online giving.
- Develop communication plan to transmit information to and receive alumni information from academic departments and athletics.
- Explore other internet communications possibilities, including social networking sites such as MySpace.

### Alumni-University Relations

- Finalized plan for merging of two career services and alumni relations graduating seniors survey.
- Worked with academic departments and administrative departments to plan and implement Inauguration.
- Worked with academic and athletic departments to provide alumni information as requested.
- Partnered with Shepherd University Bookstore to promote football play-off events and ticket sales and ram fan gear sales to alumni.

### Goals for FY09 Alumni-University Relations

- Conduct 2008 graduate survey via mail and internet; load results into Raiser's Edge database and provide report to Career Services.
- Identify opportunities to engage alumni as guest speakers.

### **Alumni Association**

- Partnered with bookstore to promote alumni membership sales online. Twenty-seven memberships were purchase out of 1,052 this first year of online sales.
- Added a members' party following the Homecoming football game; used e-mail blasts to remind members of the party. Attendance of more than 100 alumni from classes ranging from 1954-2007.
- Hosted networking reception in Washington, D.C. at a venue owned by a Shepherd alumnus. Attended by 20 alumni, classes ranging from 1960-2006.
- Managed Alumni Association membership drive.
- Provided staff support and services for all Alumni Association business, communications, committees and events.

### **Goals for FY09 Alumni Association**

- Launch new online community.

## **External Affairs Highlights FY 08**

### **Integrated Marketing Projects:**

- Center for Contemporary Arts (CCA) Promotion: External Affairs, Advancement, Admissions (CCA dedication, magazine cover and feature, Web feature, admissions recruitment postcard for art students)
- Student Community Services (SCS): External Affairs, Student Affairs, Admissions (External Affairs successfully nominated SCS to *State Journal's* "55 Good Things About West Virginia". Admissions bought tie-in advertising in the *State Journal* issue featuring SCS; and honor was featured on Web)
- New Computer Engineering Degree: Admissions, Academic Department, External Affairs (Web site created, ads designed and placed for Admissions; promotion with press release and Magazine tie-in)

### **Web:**

- Total Page Loads: 2,632,965 (7,194 per day)
- Unique Visitors: 1,651,688 (4,513 per day)
- First Time Visitors: 708,141 (1,935 per day)
- Returning Visitors: 943,547 (2,578 per day)

### **Event Planning and Management:**

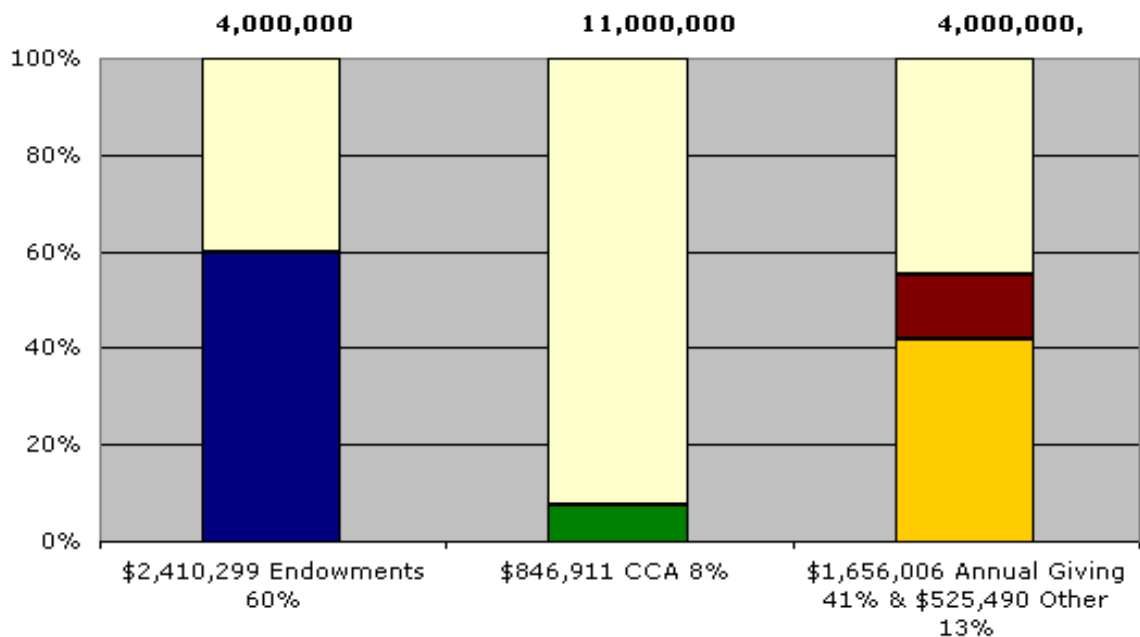
- Promotion of Rave Text Messaging Launch, August 2007
- Wellness Center Groundbreaking, December 2007
- CCA Ribbon Cutting, April 2008

### **Major Publications:**

- Shepherd University Magazine (three times a year)
- President's Annual Report
- Shepherd University Catalog
- Shepherd University Graduate Catalog
- Inauguration Materials
- The Record (bi-weekly)
- Profiles, Professional Activities of Faculty and Staff (each semester)

### **Press Releases: 508**

Shepherd University Campaign Report		
	Gifts to Date	
<u>ANNUAL GIVING</u>	<u>6/30/2008</u>	<u># Donors</u>
CATF Annual Giving	\$500,933	
Annual Fund	\$182,489	2256
AG Student	\$706,018	519
AG Student Athletics	<u>\$266,566</u>	<u>1616</u>
Subtotal	\$1,656,006	4391
<u>ENDOWMENTS</u>		
Student Endowments	\$1,597,004	1186
Faculty Endowments	<u>\$813,295</u>	<u>28</u>
Subtotal	\$2,410,299	1214
Turf Project	\$171,945	128
CCA	\$846,911	36
Campaign Restricted	\$165,000	6
Campaign Unrestricted	<u>\$188,545</u>	<u>19</u>
Subtotal	\$1,372,401	189
TOTAL	\$5,438,706	5,794
VERBAL COMMITMENTS	<u>\$229,144</u>	
TOTAL	\$5,667,850	



28.62% of Total Goal

## Shepherd University Campaign Report

	Gifts to Date	
<u>ANNUAL GIVING</u>	<u>6/30/2007</u>	<u># Donors</u>
CATF Annual Giving	\$248,465	
Annual Fund	\$103,624	1648
AG Student	\$295,167	328
AG Student Athletics	<u>\$118,057</u>	<u>915</u>
Subtotal	\$765,313	2891
<u>ENDOWMENTS</u>		
Student Endowments	\$552,444	622
Faculty Endowments	<u>\$513,591</u>	<u>15</u>
Subtotal	\$1,066,035	637
CCA	\$406,855	14
Campaign Restricted	\$95,000	5
Campaign Unrestricted	<u>\$141,070</u>	<u>18</u>
Subtotal	\$642,925	37
TOTAL	\$2,474,273	3,565
VERBAL COMMITMENTS	<u>\$466,000</u>	
TOTAL	\$2,940,273	

