



# *Foundation*

STRATEGIC PLAN

2026-2028

# DECADES OF SUPPORT

*The Winthrop University Foundation was created in 1973 to support the mission of Winthrop University. In 1993, the Foundation's scope of work was expanded to include managing assets and maintaining gift records for the University's benefit as well as redefining its relationship with the Alumni Association.*

*The Foundation is the principal recipient of private gifts from alumni and friends of the University. It manages and distributes restricted and unrestricted endowment gifts, deferred gifts, and special gifts to build and maintain programs at Winthrop University. These programs support scholarships, endowed chairs, endowed professorships, awards, faculty enrichment programs, and other services of the University.*

## THE FOUNDATION TODAY

- As of the fall of 2025, the Foundation manages about 930 funds, 520 of which are endowments.
- The Foundation's management fee is an industry-normal 1.5%, down from substantially higher fees in earlier years due to reforms and efficiency measures enacted since 2015.
- As of September 17, 2025, for the first time the total value of the Foundation portfolio surpassed \$100 million, including the main portfolio, trusts, the reserve account, and the quasi-endowment.
- In August 2025, the Foundation made possible the grand opening of Winthrop University's J. Robert Bazemore Design Center as a new way to support the University by leasing 5,000 square feet of space at the Thread, a mixed-use development adjacent to campus in Rock Hill.

## A WINTHROP-ALIGNED STRATEGIC PLAN

The Winthrop Foundation Board's intent is to build upon its recent internal reforms to continue to construct a culture of operational excellence, fostering confidence in its donor partners and strong financial performance to the benefit of the University. This plan will also align the Foundation's goals with the University's, as expressed in its own "Winthrop: United in Excellence" strategic plan.

By undertaking this strategic planning process, the Winthrop University Foundation Board of Directors is confident that the Foundation will continue to strengthen and grow, allowing it to accomplish its mission of providing the necessary private sector resources to ensure that Winthrop continues to provide life-changing opportunities to its students.

# MISSION, VISION, VALUES



## MISSION STATEMENT

The Winthrop University Foundation supports the University by connecting donor passions to institutional needs through strategic and professional stewardship and asset management, providing the necessary private sector resources to ensure that Winthrop continues to provide life-changing opportunities to its students.



## VISION STATEMENT

Our success will lead to a prosperous Winthrop University that has access to all of the resources its faculty, staff, and administration require to provide world-class educational opportunities to each and every student.



## VALUES STATEMENT

**Integrity** – we act ethically and transparently in everything we do.

**Excellence** – we never settle for less than the highest quality of work.

**Respect**– we value an academic community built on the acceptance of all individuals.

**Engagement** – our strength lies in bringing people together to support the University.

**Innovation** – we remain relevant by embracing fresh ideas and new approaches.

**Collaboration** – we are successful by providing value to our various partners.



[WWW.WINTHROP.EDU/FOUNDATION](http://WWW.WINTHROP.EDU/FOUNDATION)

# STRATEGIC PILLARS

## INCREASE PHILANTHROPY

The Foundation will expand its support of Winthrop University through increased financial assistance and a targeted disbursement policy.

## DEVELOP AND ENGAGE BOARD MEMBERS

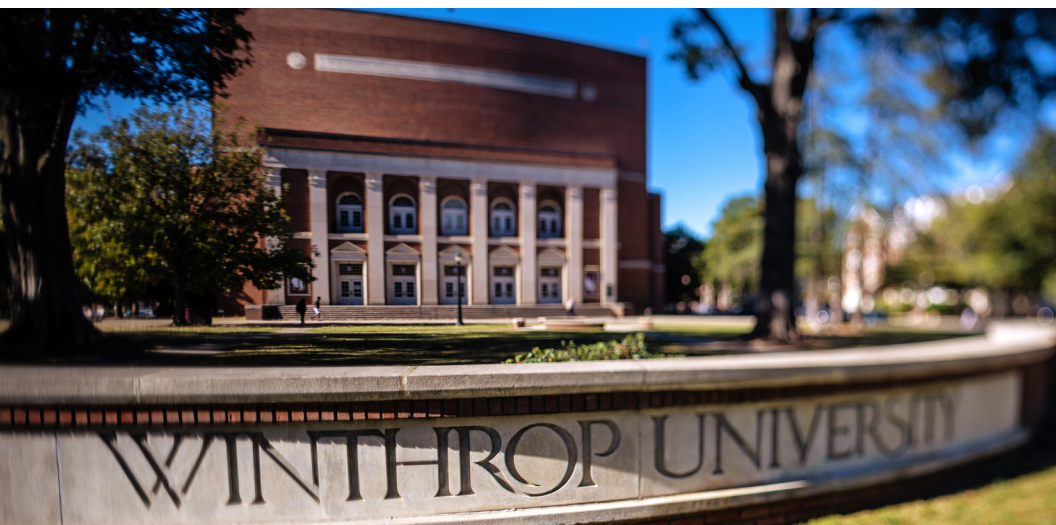
The Foundation will strengthen its Board of Directors by creating a board member assessment process, implementing a recruitment plan for new board members, and implementing a stewardship and engagement plan for all board members.

## HEIGHTEN THE FOUNDATION'S REPUTATION

The Foundation will raise its own profile with key stakeholder groups as a valued strategic partner of Winthrop University and a trusted steward of financial gifts to the University.

## ELEVATE OPERATIONAL EXCELLENCE

The Foundation will continue and expand upon its current focus on prudent, rigorous practices regarding investment policy, donor stewardship, and financial support to the University.





# INCREASE PHILANTHROPY

The Foundation will expand its support of Winthrop University through increased financial assistance and a targeted disbursement policy

## GOALS AND STRATEGIES

1. The Foundation will support Winthrop University's capital campaign with a focus on storytelling (*Development Committee*)
  - The Foundation and University staff will educate board members about the campaign (including the "why") with enough detail that they can speak with some authority about it.
  - The Foundation will create a board giving plan with the express goals of achieving 100% board participation and increasing the overall amount the board raises. This plan will include the use of board members as hosts for small groups of potential campaign supporters. The plan will also describe how board members will support fundraising in key geographic markets identified by University Advancement.
2. In support of the above, the Foundation will increase its focus on unrestricted gifts (*Development Committee*)
3. The Foundation will steward alumni and other donors who have created scholarships to ensure their satisfaction with their gifts and support additional giving in the future. (*Development Committee*)



**MAKE A GIFT TODAY!**

# DEVELOP & ENGAGE BOARD

The Foundation will strengthen its Board of Directors by creating a board member assessment process, implementing a recruitment plan for new board members, and implementing a stewardship and engagement plan for all board members.

## GOALS AND STRATEGIES

1. The Foundation will create an engagement and stewardship plan for all board members. *(Executive Committee)*
  - In general, the plan will define what it means to be an ambassador of Winthrop University, including a deeper understanding of the University, its needs, and current initiatives. The plan will identify additional opportunities for full board engagement, and seek to identify formal ways to engage former board members in advisory roles. The plan will also identify opportunities for board members to connect regularly with the Foundation's professional staff.
  - The plan will also create a process to evaluate individual board member engagement, both in philanthropy and volunteerism.
2. The Foundation will create and implement a board assessment and new member recruitment plan. *(Executive and Nominating Committees)*
  - To ensure a robust succession plan and on ongoing pipeline of valuable new board members, the board will create an annual assessment plan. The plan will consider the current committee structure and identify any current or future gaps in board expertise required by the committees. The plan may include the creation of task forces and/or allow non-board members to serve on committees.
  - The Foundation will also create and maintain a process for identifying and engaging with potential new board members. The Foundation will create a communication plan for onboarding new Board members.

# HEIGHTEN OUR REPUTATION

The Foundation will raise its own profile with key stakeholder groups as a valued strategic partner of Winthrop University and a trusted steward of financial gifts to the University.

## GOALS AND STRATEGIES

1. The Foundation will elevate its visibility as appropriate with various stakeholder groups such as alumni, donors, current students, parents, University partners, and the local community through storytelling, focusing on donor stewardship, personal experiences, and the direct impact of gifts on students and the University. (*Development Committee*)
  - The Foundation will seek to collaborate with its University partners on various communications channels, such as Winthrop Magazine and social media.
  - Each member of the Foundation board will more actively engage with alumni and other individuals in his or her sphere of influence that are positioned to support the University.
2. The Foundation will strengthen its internal relationships and partnerships with Winthrop University faculty, staff, and administration (*Operations Committee*)
  - Foundation board and staff members will continue to improve processes with the University's finance and business department.
  - The Foundation will continue to work with faculty and staff to provide and manage Foundation resources for the benefit of each academic unit and university department.

# ELEVATE OPERATIONAL EXCELLENCE

The Foundation will continue and expand upon its current focus on prudent, rigorous practices regarding investment policy, donor stewardship, and financial support to the University.

## GOALS AND STRATEGIES

1. The Foundation will identify and pursue designations for outstanding charity organizations including excellence in financial stewardship (*Investment Committee*)
  - The Foundation will pursue designations from organizations such as Charity Navigator, Guidestar, and the Better Business Bureau.
  - The Foundation will publicize as appropriate any such designations received in order to enhance its brand and communicate its trustworthiness to all of its existing stakeholders as well as potential donors and partners.
2. The Foundation will conduct periodic reviews of the new Executive Director (*Executive Committee*)
3. The Foundation will employ an effective allocation plan for resource disbursement (*Operations Committee*)
  - The Foundation annually will review and affirm/modify its funding allocation process, including its budget and the prioritization of uses of unrestricted funds. The Foundation will undertake an annual review to monitor the plan's effectiveness.