



Board of Trustees University Advancement Update

Evan Bohnen

Vice President for University Advancement

October 24, 2019

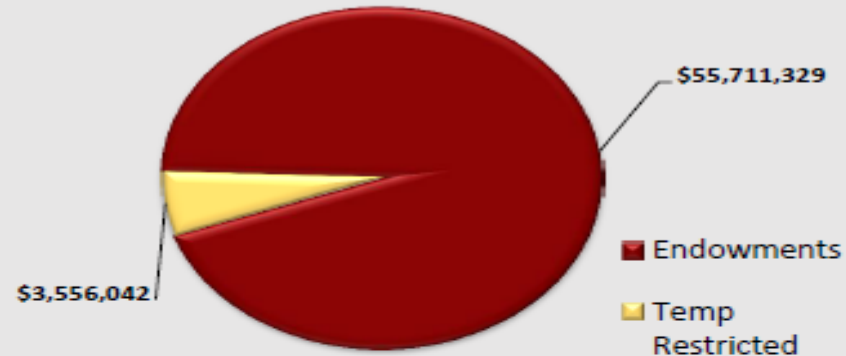
Agenda

- Eagle Athletics/Club Fund Raising
- Winthrop Foundation Dashboard
- University Advancement Dashboard
- UA FY20 Annual Work Plan

Winthrop Foundation Dashboard

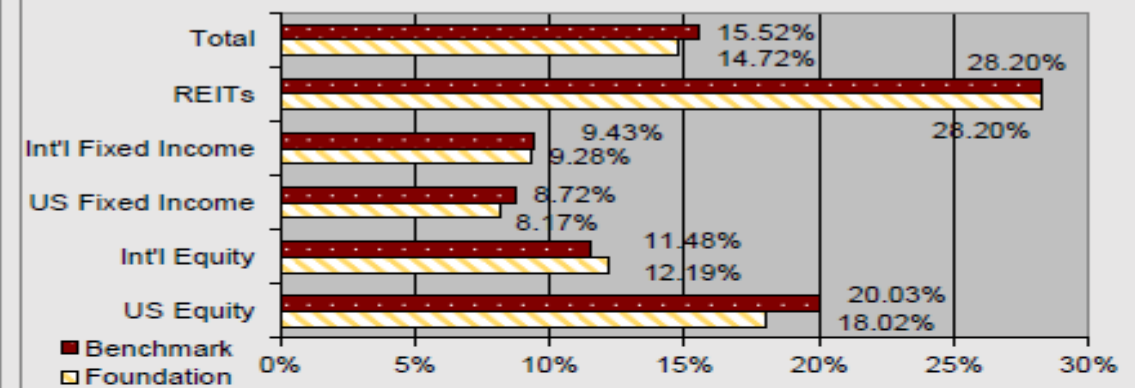
Investment Analysis

Portfolio Market Value \$59,267,371

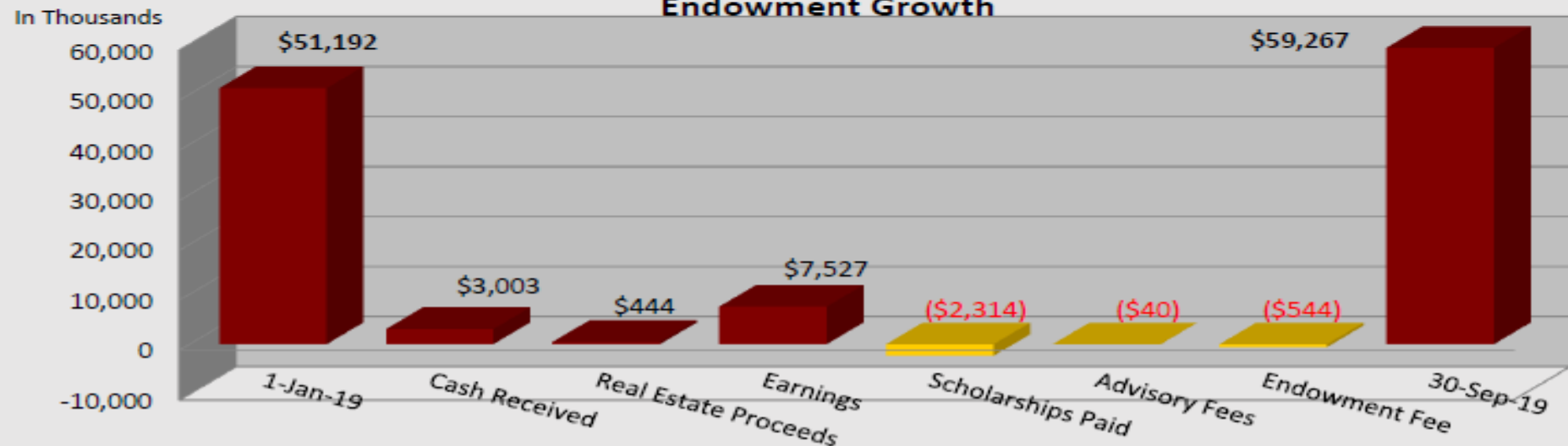


Invested with Vanguard since December 2016

YTD Return by Asset Class



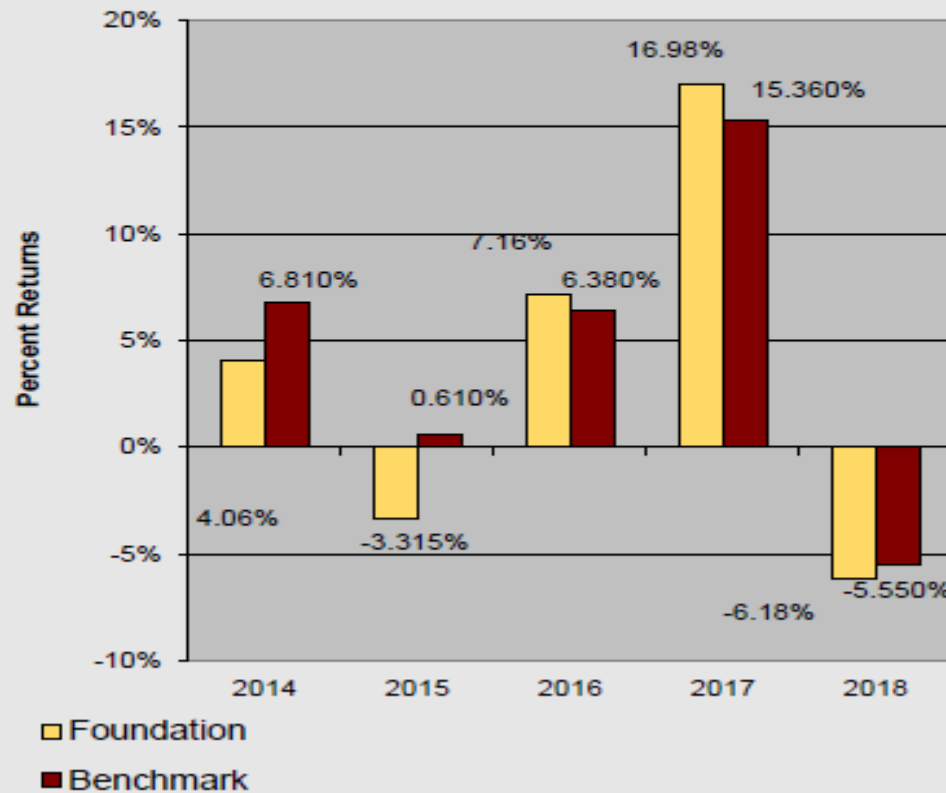
Endowment Growth



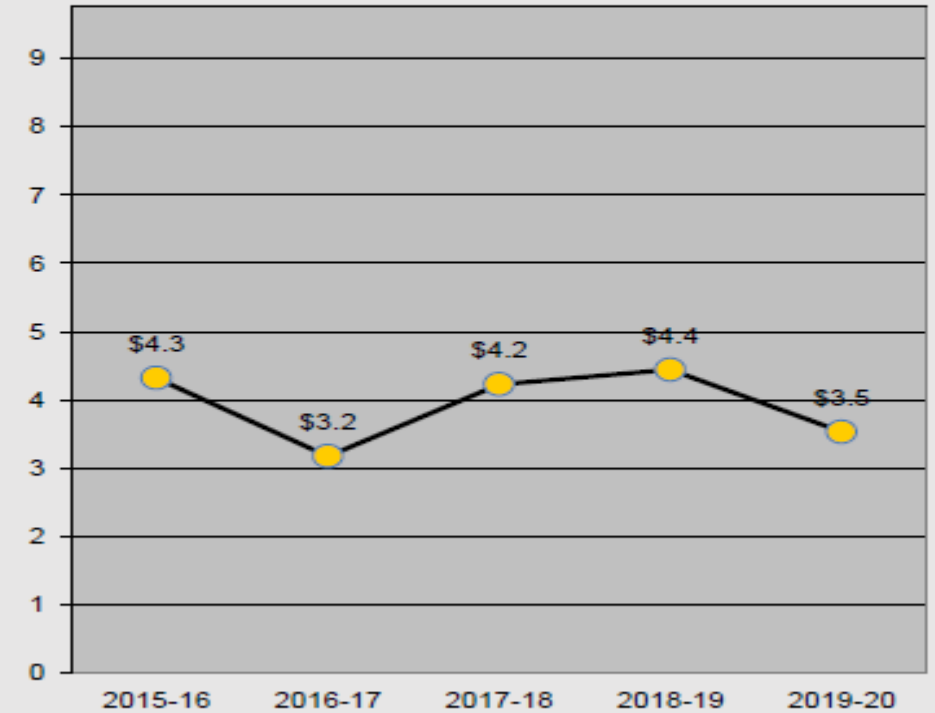
Winthrop Foundation Dashboard

Investment Analysis

Historical Investment Returns

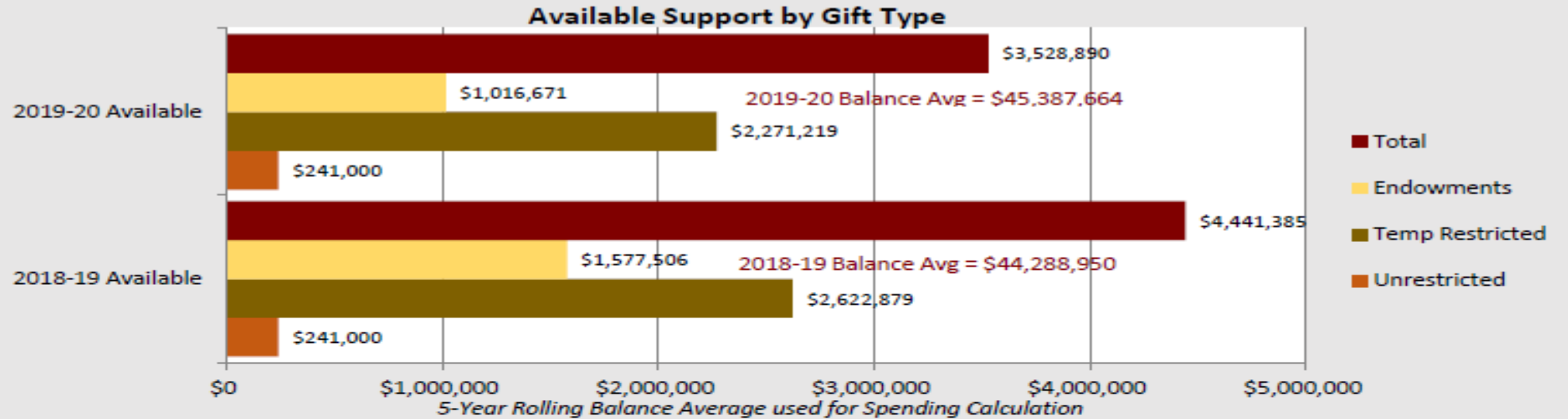


Endowment Support \$

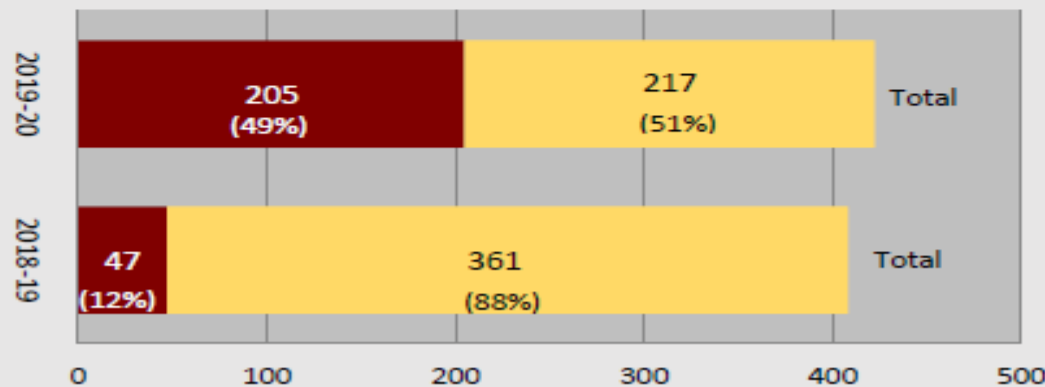


Winthrop Foundation Dashboard

Scholarship Analysis



Underwater Endowments



Spending Analysis

2018-19

Disbursed by Financial Aid = \$1,718,540
 Disbursed by Foundation = \$1,294,928
 Total Disbursed = \$3,013,468

2019-20 YTD

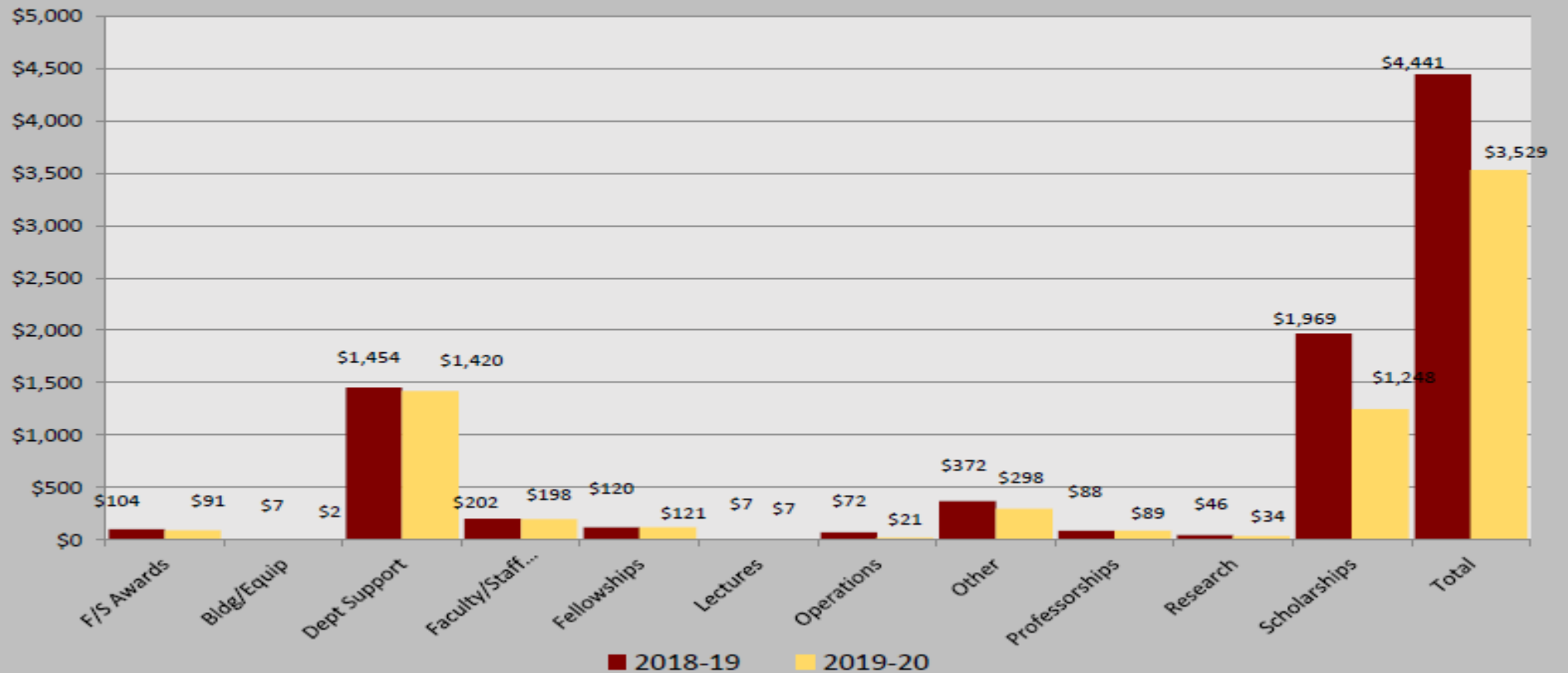
Disbursed by Financial Aid = \$343,253
 Disbursed by Foundation = \$375,575
 Total Disbursed = \$718,828

Winthrop Foundation Dashboard

Scholarship Analysis

Available Support by Award Type

Thousands



Winthrop Foundation Dashboard

Endowment Analysis 2006-2018

Period	Endowments						Spending Analysis						
	Total Number of Endowed Funds	Number of Underwater Funds	% of Funds Underwater	Endowment Market Value	Endowment Performance	Benchmark	Spend Rule Policy	Actual Spend Rate	Admin Fee	Balance Average	Amount Available	Full Funding	Funding Deficit
(2018) 2019-20 Academic Year	422	205	49%	\$ 51,191,914	-6.18%	-5.55%	4.00%	**	1.75%	\$45,387,664	\$1,016,671	\$1,815,507	(\$798,836)
(2017) 2018-19 Academic Year	408	47	12%	\$ 53,828,912	16.98%	15.36%	4.00%	3.56%	2.25%	\$44,288,950	\$1,577,506	\$1,771,558	(\$194,052)
(2016) 2017-18 Academic Year	395	243	62%	\$ 46,803,217	7.16%	6.38%	4.00%	1.69%	3.50%	\$36,957,190	\$626,035	\$1,478,288	(\$852,253)
(2015) 2016-17 Academic Year	397	281	71%	\$ 40,967,058	-3.32%	0.61%	4.00%	1.04%	6.00%	\$35,007,529	\$363,152	\$1,400,301	(\$1,037,149)
(2014) 2015-16 Academic Year	387	112	29%	\$ 42,168,628	4.06%	6.79%	4.00%	2.70%	6.00%	\$34,119,216	\$921,545	\$1,364,769	(\$443,224)
(2013) 2014-15 Academic Year	385	69	18%	\$ 40,016,463	14.54%	16.27%	4.00%	3.40%	6.00%	\$32,139,939	\$1,092,110	\$1,285,598	(\$193,488)
(2012) 2013-14 Academic Year	378	218	58%	\$ 33,232,185	11.07%	11.28%	3.00%	1.05%	6.00%	\$26,511,341	\$279,126	\$795,340	(\$516,214)
(2011) 2012-13 Academic Year	332	224	67%	\$ 30,661,557	-1.12%	-0.31%	3.00%	0.68%	6.00%	\$26,193,870	\$177,736	\$743,670	(\$565,934)
(2010) 2011-12 Academic Year	350	197	56%	\$ 30,655,810	-3.65%	-2.10%	4.00%	1.92%	6.00%	\$23,219,460	\$445,873	\$1,004,436	(\$558,563)
(2009) 2010-11 Academic Year	351	236	67%	\$ 26,827,817	24.94%	24.68%	4.00%	0.96%	6.00%	\$24,336,890	\$233,491	\$973,476	(\$739,985)
(2008) 2009-10 Academic Year	374	260	70%	\$ 22,458,834	-28.59%	-26.55%	5.00%	0.90%	3.00%	\$23,952,026	\$214,855	\$950,047	(\$735,192)
(2007) 2008-09 Academic Year	360	15	4%	\$ 31,796,000	8.23%	6.16%	4.00%	3.85%	3.00%	\$24,726,438	\$951,062	\$989,058	(\$37,996)
(2006) 2007-08 Academic Year	332	10	3%	\$ 30,822,000	13.40%	10.75%	5.00%	4.91%	3.00%	\$24,457,101	\$1,201,369	\$1,223,418	(\$22,049)

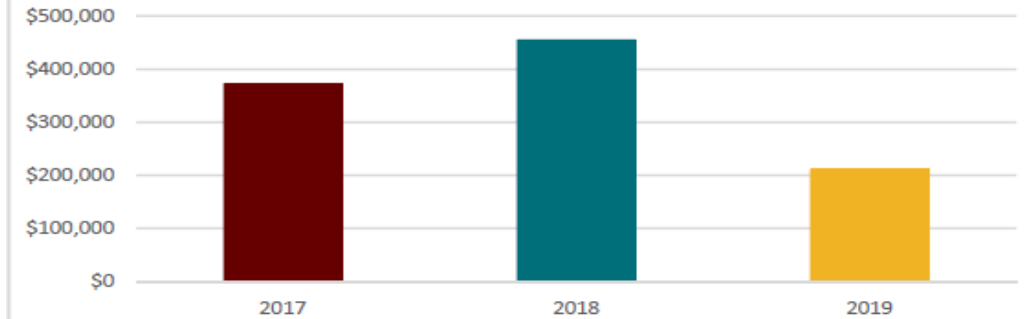


Advancement Dashboard

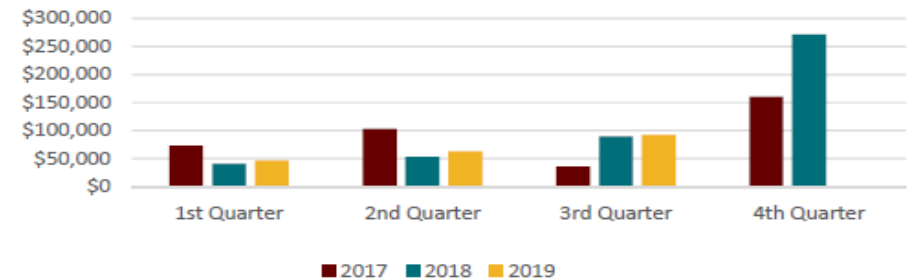
*CY2019 Winthrop Fund cash receipts are through 9/30.

*CY2017 & CY2018 Winthrop Fund cash receipts are for full 12 months.

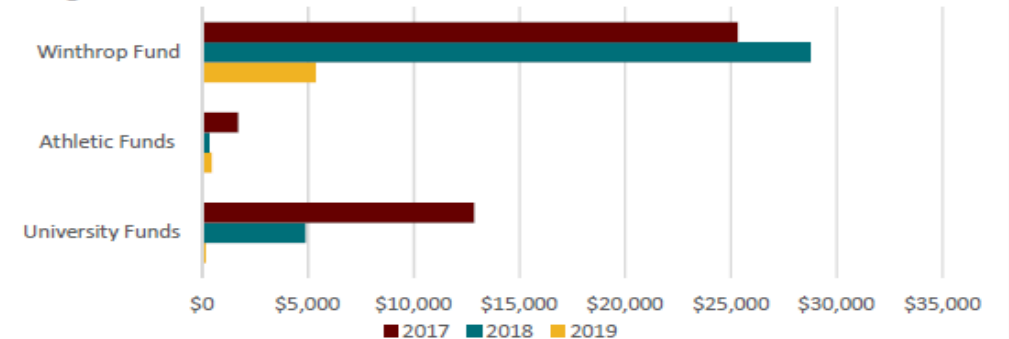
Winthrop Fund Cash Receipts



Winthrop Fund Cash Receipts by Quarter



Pledge Write Offs

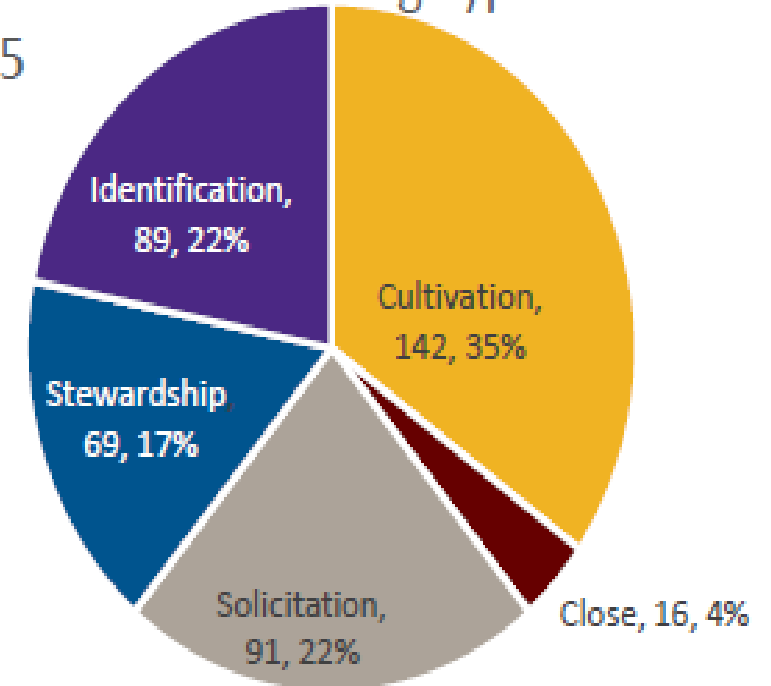




Advancement Dashboard

*CY2019 personal development visit goal for the Development team of at least 690 visits.

Prospect Contacts: Meeting Types
Total: 415

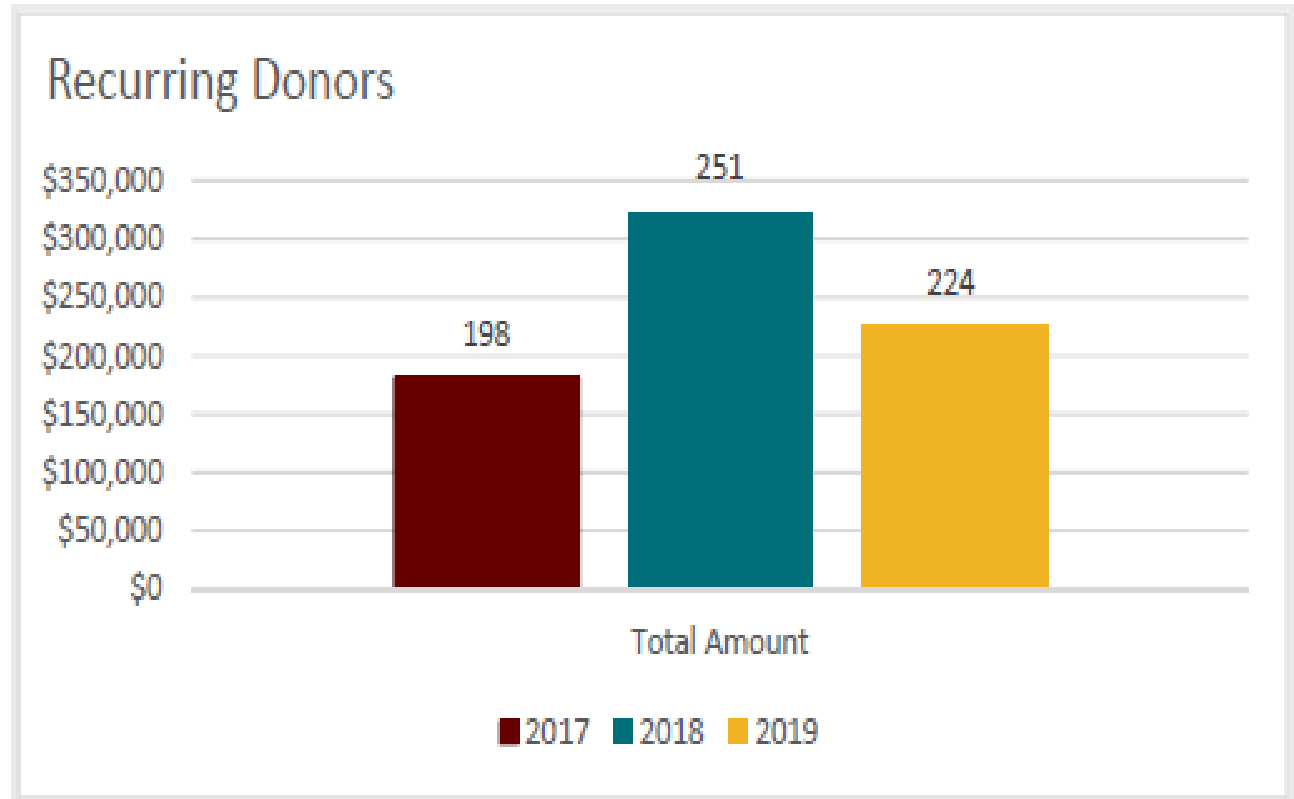




Advancement Dashboard

*CY2019 Recurring Donors are through 9/30.

*CY2017 & CY2018 Recurring donors are for full 12 months.



Advancement Dashboard

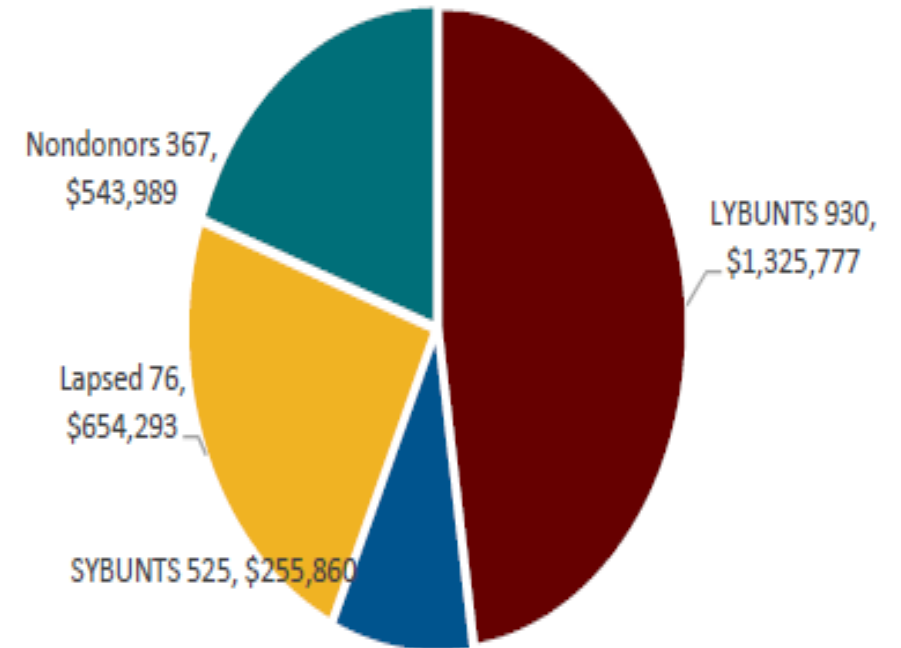
*LYBUNTs—Last year but unfortunately not this year (year over year, retention donors)

*SYBUNTs—Some years but unfortunately not this year or last year (sporadic donors)

*Lapsed—Last gift was more than 4 years ago

*Nondonors—Never made a gift or last gift was more than 10 years ago

2019 Donor Retention





Advancement Dashboard

*CY2019 Gift closure ratio: 3.84:1

Current Key Performance Indicator (KPI) for gift closure ratio in higher education industry:

*4:1 For mature prospect pools

*6:1 For cold or early development prospect pools

Proposals (\$5000+)

2019 Ask Amounts:

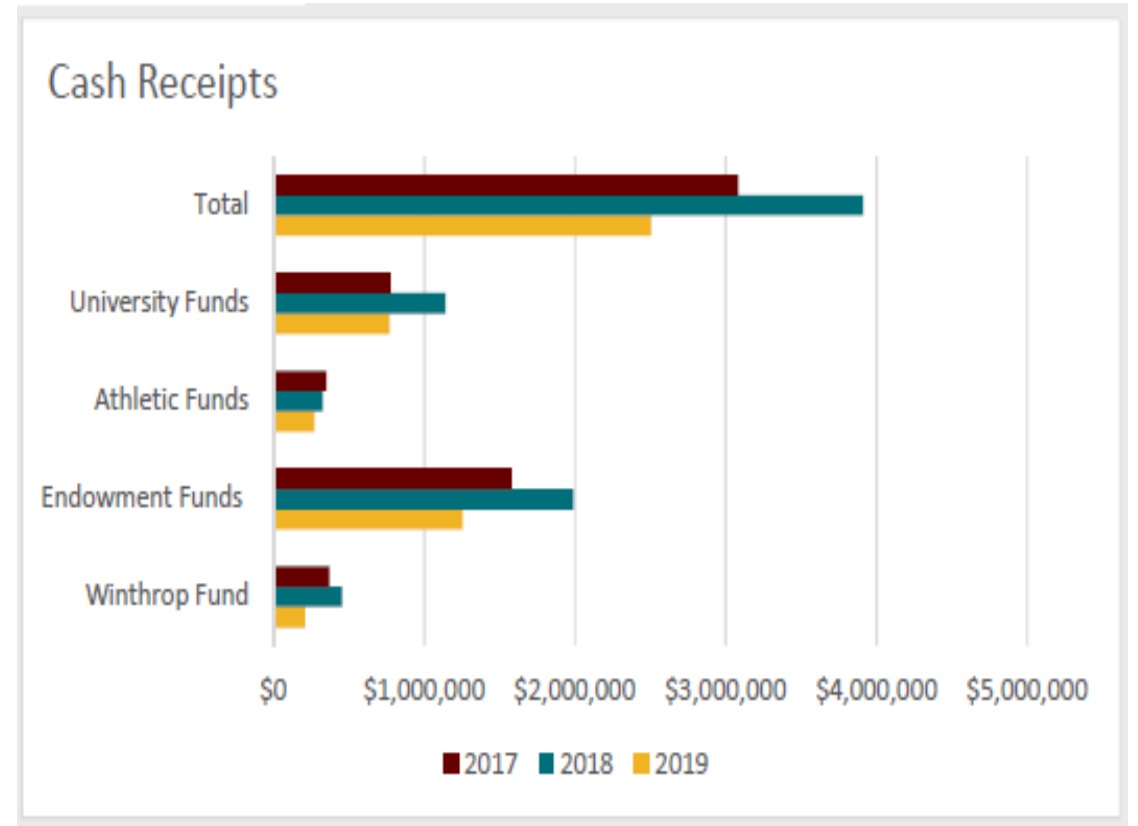
\$6,504,300 (100 proposals)

2019 Proposal Awarded:

\$2,535,313 (26 proposals)

Advancement Dashboard

*Athletic Funds totals do not include Eagle Club Auction fund raising and results.





Advancement Dashboard

- *Launched January 2018
- * 81 Charter members as of 12/31/18
- *110 Charter membership goal for CY2019
- *109 Charter members as of 9/30/19
- *\$1.7M pledged over 5 years to University priorities including the Winthrop Fund
- *\$78,257 pledged to the Winthrop Fund (YTD) from WLS members for CY2020

Winthrop Leadership Society

Current Member Count: 109

Cash Receipts: \$353,535

Pledge Balance: \$1,362,506

Total: \$1,716,042

Advancement Dashboard

*FY17 Alumni participation: 2,750 donors (6.99%)

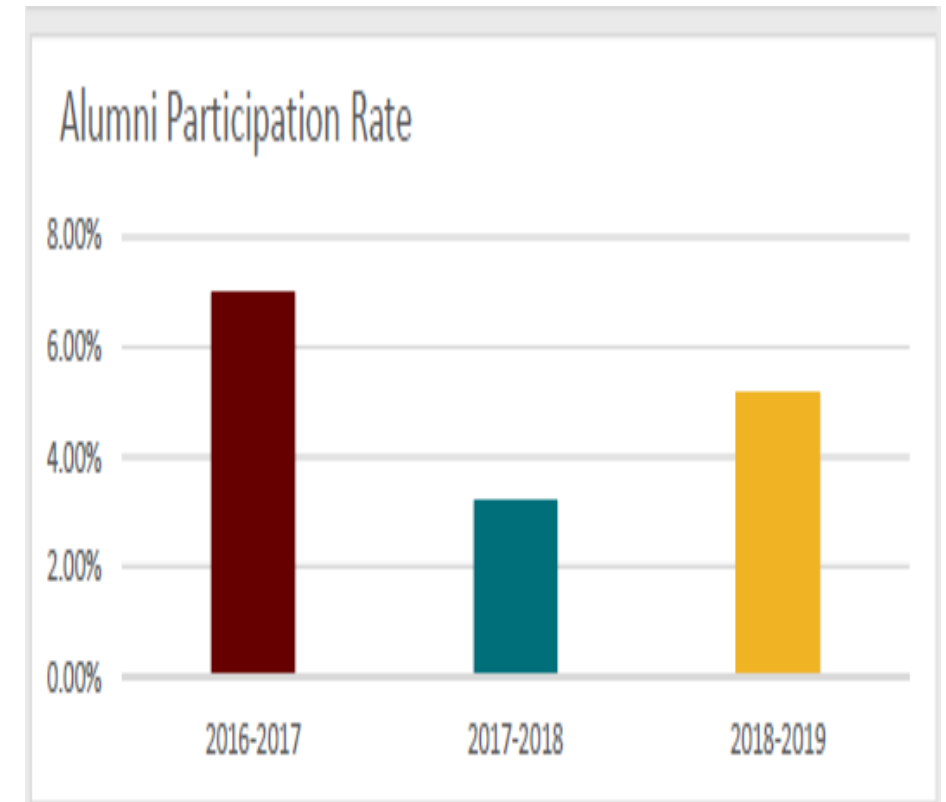
*FY18 Alumni participation: 1,242 donors (3.18%)~

*FY19 Alumni participation: 2,061 donors (5.14%)

Median alumni participation rate for public universities is 5.00% since 2014.^

~Annual Giving position vacant for nine (9) months of FY18

^Blackbaud 2016 DonorCentrics Annual Report on Higher Education Alumni Giving





University Advancement FY20 Annual Work Plan

- Goal 1: Deliver a safer, more secure, and more enjoyable tailgating experience to all 2019 Homecoming participants.
- Goal 2: Support the volunteer alumni leadership and programming for our regional and national alumni chapters. At this time, we support nine (9) alumni chapters and five (5) young alumni or graduates of the last decade (GOLD) chapters.
- Goal 3: Meet or exceed goal of 110 cumulative Winthrop Leadership Society (WLS) memberships by December 31, 2019 (CY 2019).
- Goal 4: Frontline Development Officers to secure an additional \$100,000 in Winthrop Fund gifts and pledges through WLS memberships for calendar year 2020.



University Advancement FY20 Annual Work Plan (cont.)

- Goal 5: Continued implementation of Enterprise Data Quality (EDQ) initiatives to improve alumni connectivity with their alma mater and improve effectiveness of UA programming and initiatives.
- Goal 6: Meet or exceed \$350,000 cash goal established by the Foundation Board for calendar year 2019.
- Goal 7: Establish, rollout, and market unrestricted Winthrop Endowment for future gifts.
- Goal 8: Meet or exceed goal of 690 personal development visits for calendar year 2019.
- Goal 9: Raise at least \$4,000,000 in gifts and pledges in support of Winthrop University.



Questions & Comments

Thank you for your advocacy
& support of Winthrop University