

# University Advancement

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# Division Overview

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Vice President Kim O'Neill

# UNIVERSITY ADVANCEMENT

*The mission of University Advancement is to build relationships through meaningful engagements that foster pride, encourage advocacy, and promote private support for Western Washington University.*

# UNIVERSITY ADVANCEMENT SERVING WESTERN

- Serving 136,935 total alumni
  - 77.5% live in Washington
    - 23% in King County
    - 14% in Whatcom County
- Serving over 8,580 donors annually

# UNIVERSITY ADVANCEMENT

The Western Foundation receives and encourages private giving to WWU in the form of annual gifts, endowed gifts, estate gifts, and gifts in kind, all of which support student scholarships, programs, and faculty members.

Foundation  
Board

The Western Washington University Alumni Association strengthens Western by building strong and caring relationships that make a difference among our students, alumni, friends, and the greater university community.

Alumni  
Association  
Board





# UNIVERSITY-WIDE FUNDING PRIORITIES

Western's current funding priorities include two sustainably designed capital projects—an advanced technology engineering and computer science building and a Coast Salish style longhouse.

The new STEM building responds to the needs of Washington state employers and student demand for increased access to electrical engineering, computer science, and energy degrees. The state is providing \$53 million toward the \$72 million project budget, with the balance of funds being raised through private contributions. The vision for a longhouse at Western originated from Western's Native American Student Union and is the result of decades of discussion. The \$5 million project has \$4.5 million in state funds with the balance being raised through private contributions.

Other priorities include increasing scholarships aimed at recruiting and retaining students from historically underrepresented groups and strengthening graduate programs.

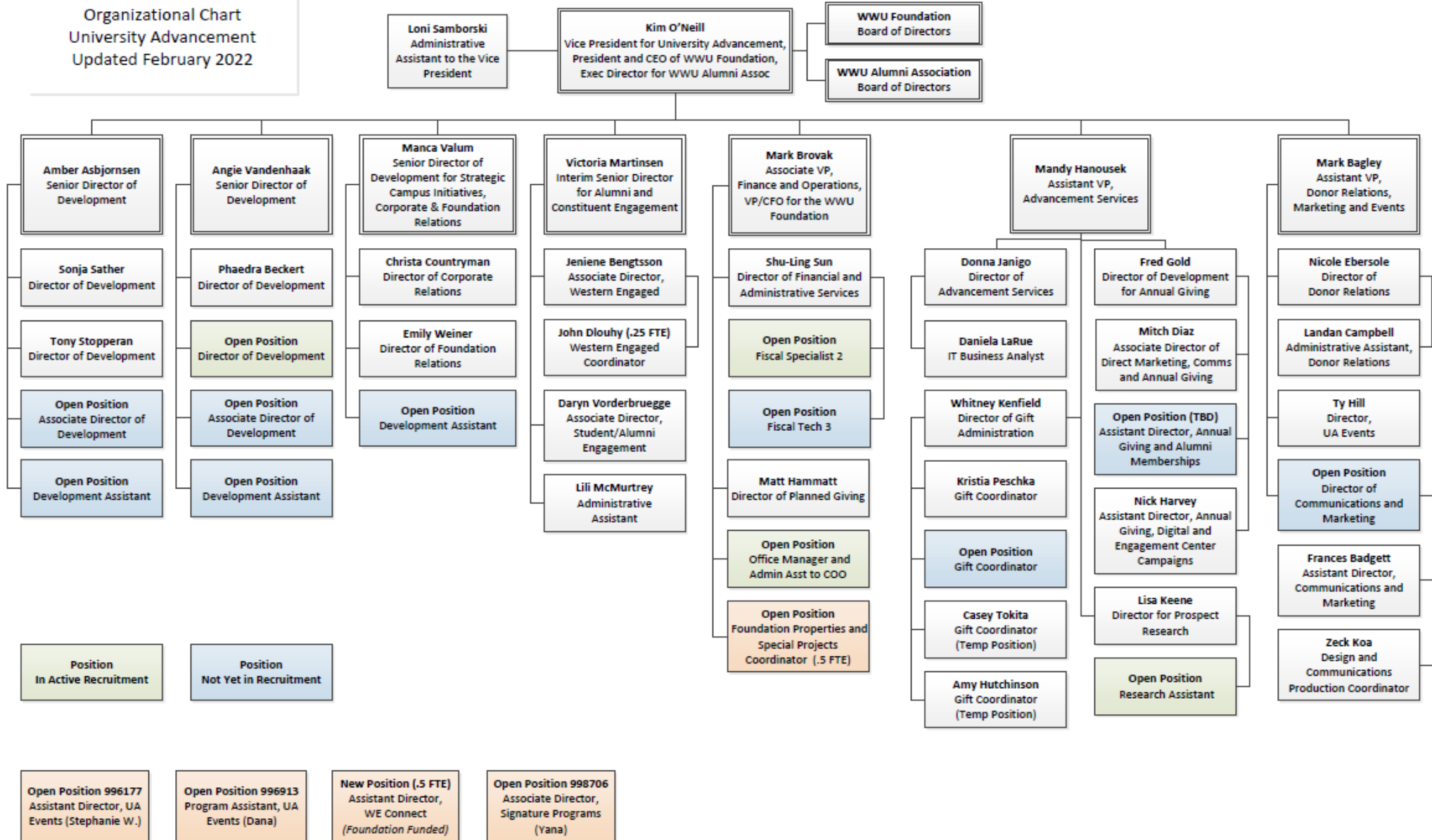
# UNIVERSITY-WIDE FUNDING PRIORITIES

In addition to a \$16 million fundraising goal for the FY22 year, President Randhawa has identified the following as additional fundraising opportunities that align with the strategic plan.

	One Year Change	\$ Needs	2-3 Years Out
Recruitment	+300 students	Recruitment (\$600k in year 1, increasing by \$600k/yr through year 4) \$450k/year – Fee waivers	~3,500-3,600 to ~4,000-4,200 degrees awarded/yr 2,900 to 3,500 (frosh enrollment) 1,100 to 1,500 (transfer enrollment)
Retention	+1%	20% expansion of current programs (\$100k/yr) New program pilots (\$200k)	79% to 83%
Honors College	+25 students	Faculty (\$125k/yr) Recruitment and retention (\$600k/yr)	235 to 300
Graduate Programs	---	Marketing and recruitment (\$200k) Increase # of teaching assistants (\$200k/yr)	~250 to ~350 degrees awarded/yr ~750 to ~850 enrollment



Organizational Chart  
University Advancement  
Updated February 2022



# ADVANCEMENT SERVICES

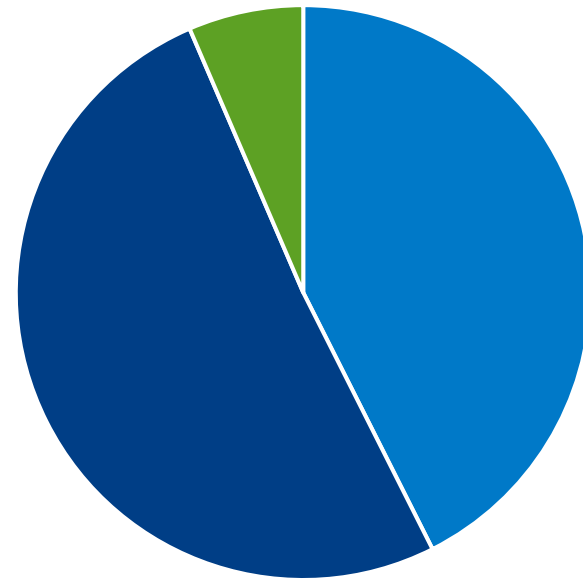
- Data Management: system implementation, maintenance, integrity, reporting
  - Manage advancement CRM (369,000+ records)
  - Manage digital platforms for event management, email, online giving, etc.
  - Coordination with central WWU IT
  - End-user training
- Gift Administration
  - Gift processing (almost 18,000 pledges and gifts annually)
  - WWU Foundation gift acknowledgements and receipts
  - Constituent bio updates

# PROSPECT RESEARCH AND MANAGEMENT

- Partnering with frontline fundraisers to grow donor pipeline
- Portfolio management
- Gift officer metrics and goals
- Prospect profiles showing giving capacity, wealth indicators, affinity, etc.

# WWU PROSPECT DATA

## Gender



■ Female 42.6%

■ Male 51.0%

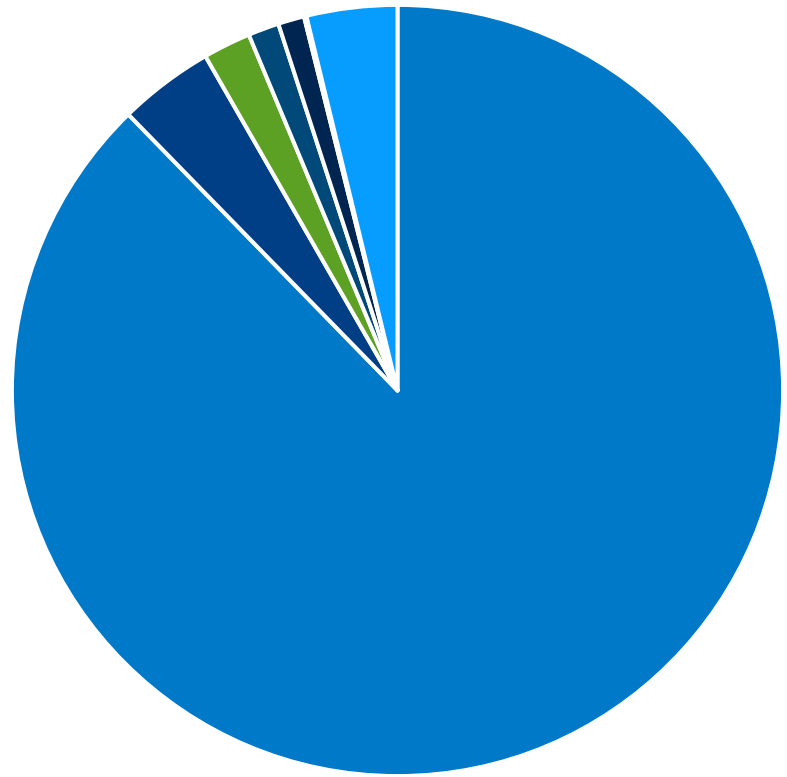
■ Unknown 6.5%

*Wealth-rated constituents including alumni, donors, friends Total = 265,977 records*

*Wealth-rated alumni (no donors or friends included) Total = 91,128 records (unknown excluded)*

# WWU ALUMNI PROSPECT DATA

## Race/Ethnicity



- White 87.7%
- Asian 4.0%
- Hispanic 2.0%
- Black/African American 1.3%
- American Indian/Alaska Native 1.1%
- Native Hawaiian/Pacific Islander 0.1%
- Multiracial 3.8%

*Wealth-rated alumni (no donors or friends included) Total = 91,128 records (unknown excluded)*

# FY2022 KEY METRICS

	FY2022 Goal	FY2022 YTD	FY2021
Fundraising to Date	\$16,000,000	\$14,048,353 (87.8% to goal)	\$10,773,725
% of Alumni Who Give	n/a	2.15%	3.58%
% of Donors Who Are Alumni	n/a	57.08%	55.90%
% of \$ From Alumni	n/a	45.22%	26.81%

We are also working to add the median of our Engagement Score, which is currently under review.

# MAJOR GIFTS AND ESTATE PLANNING

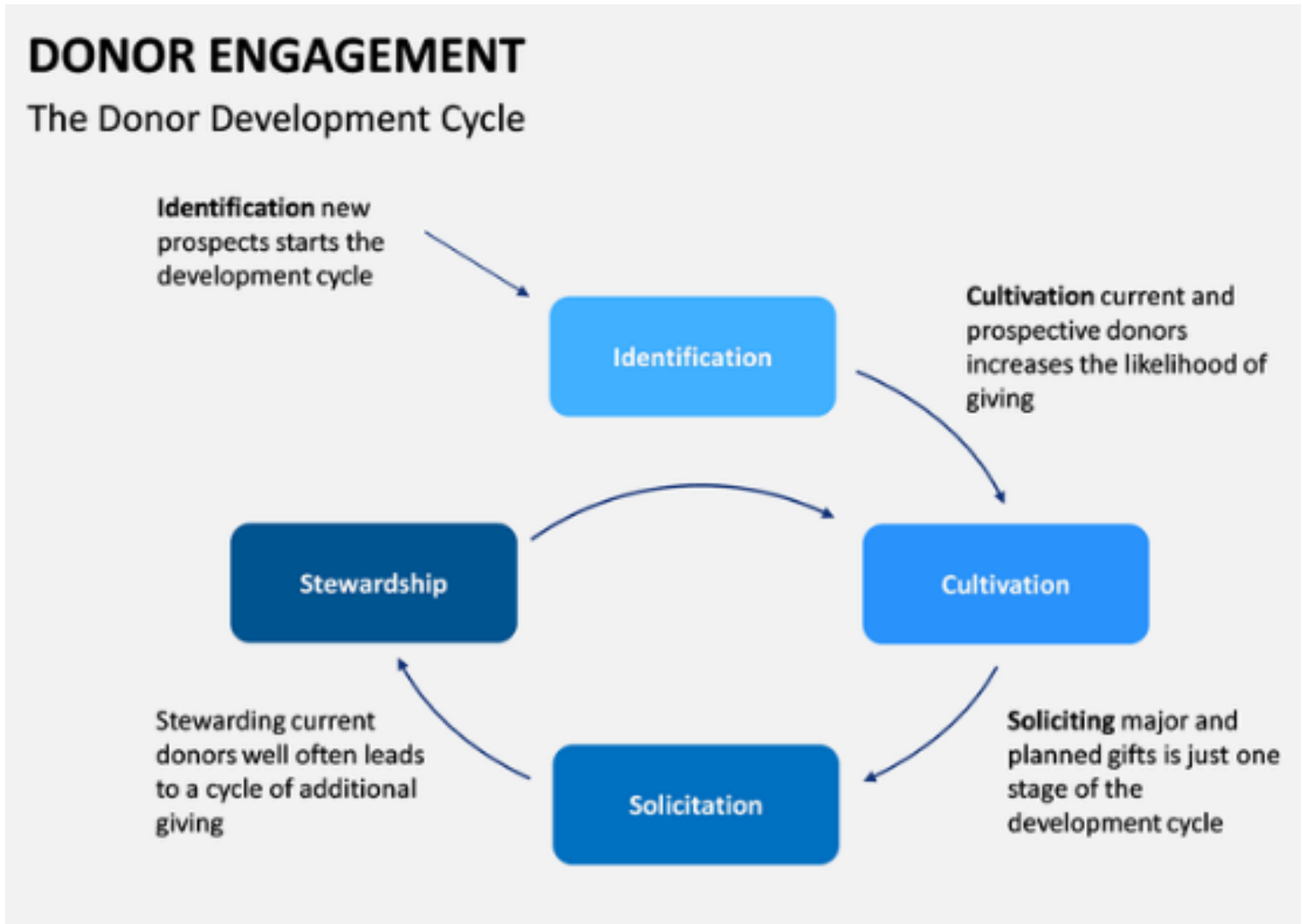
- Centralized Model based on a capacity analysis
- Development professionals strategically placed at each level of the pipeline:
  - \$250,000 + Principal Gifts
  - \$25,000 + Major Gifts
  - \$1,000 + Mid-level gifts
- Team of gift officers dedicated to securing gifts in support of fundraising priorities across the University
- Prospect driven fundraising strategies
- Regional outreach to areas with concentrations of high net worth, high affinity prospects
- Professional Development focused on best practices to empower gift officers to more effectively penetrate the prospect pool and secure increased support for the institution
- Estate Planning: Director of Planned Giving, and all gift officers trained and actively asking for estate gifts as a part of their major gift fundraising strategies

# CORPORATE AND FOUNDATION RELATIONS (CFR)

- CFR team is part of the centralized model for fundraising across all university units
- Provide strategic management of corporate and foundation relationships toward successful solicitation of cash and in-kind gifts, with an emphasis on major (\$25K+) and principal (\$250K+) gifts
- Oversees the development of mutually beneficial relationships that lead to strategic partnerships, including the development of comprehensive corporate partnership agreements and sponsorships packages
- Oversees the discovery, cultivation, solicitation, and stewardship of gifts and philanthropic grants from foundations and corporations
- Works closely with faculty and staff to identify funding opportunities and to develop successful grant proposals
- Provides training to strengthen faculty and staff skills and ability to seek and secure philanthropic support



# DONOR ENGAGEMENT CYCLE



# DONOR RELATIONS, EVENTS AND COMMUNICATIONS

- Sharing the personal impact philanthropy makes for students, faculty, and campus programs via one-on-one outreach, customized reports and special programming
- Creation and production of engagement opportunities between donors, students, faculty and VIPs to encourage personal interactions and foster close ties to Western
- Facilitate all communications with alumni, donors and friends of WWU through print, electronic, and social media channels
- Production of annual Stewardship Report, e-newsletters, Window on Western articles, President's Report, invitations, proposals and marketing materials
- Strategic management of President's, 1893, Old Main recognition societies, and named campus spaces
- Facilitate open communication with campus partners to ensure timely and accurate information sharing

# ALUMNI AND CONSTITUENT ENGAGEMENT

- Strategy development for engagement of all university advancement constituents including alumni, students, parents, donors, faculty/staff, and community/friends
- Alumni and constituent events (live and virtual)
- Alumni recognition activities and events
- WE Connect alumni and student online networking and engagement platform
- Academic and affinity-based events and programs for alumni through Western Engaged (WE)

# ANNUAL GIVING AND MEMBERSHIP

- Annual giving strategy for all university advancement constituents (alumni, friends, parents, students, faculty/staff, etc.)
- Securing gifts up to \$24,999 annually through phone, text, electronic, direct mail channels
- President's Society gifts of \$1,000+
- Manage online affinity campaigns, crowdfunding and peer-to-peer fundraising with VikingFunder
- WWU Give Day: single day of giving to support the University
- Engagement Center: soliciting gifts, thank you calls, etc.
- Strategy development for securing Alumni Association memberships

# FINANCE AND OPERATIONS

- Treasury
- Financial and accounting services
- Endowment Investment management
- Real estate transactions and management
- Human resource functions
- Budget, revenues and expenditures
- Not-for-profit audit management
- Contracts and Legal liaison

# WWU ALUMNI ASSOCIATION

***The mission of the WWU Alumni Association is to strengthen Western by building strong and caring relationships that make a difference among our students, alumni, friends, and the greater university community.***

# SIGNATURE PROGRAM

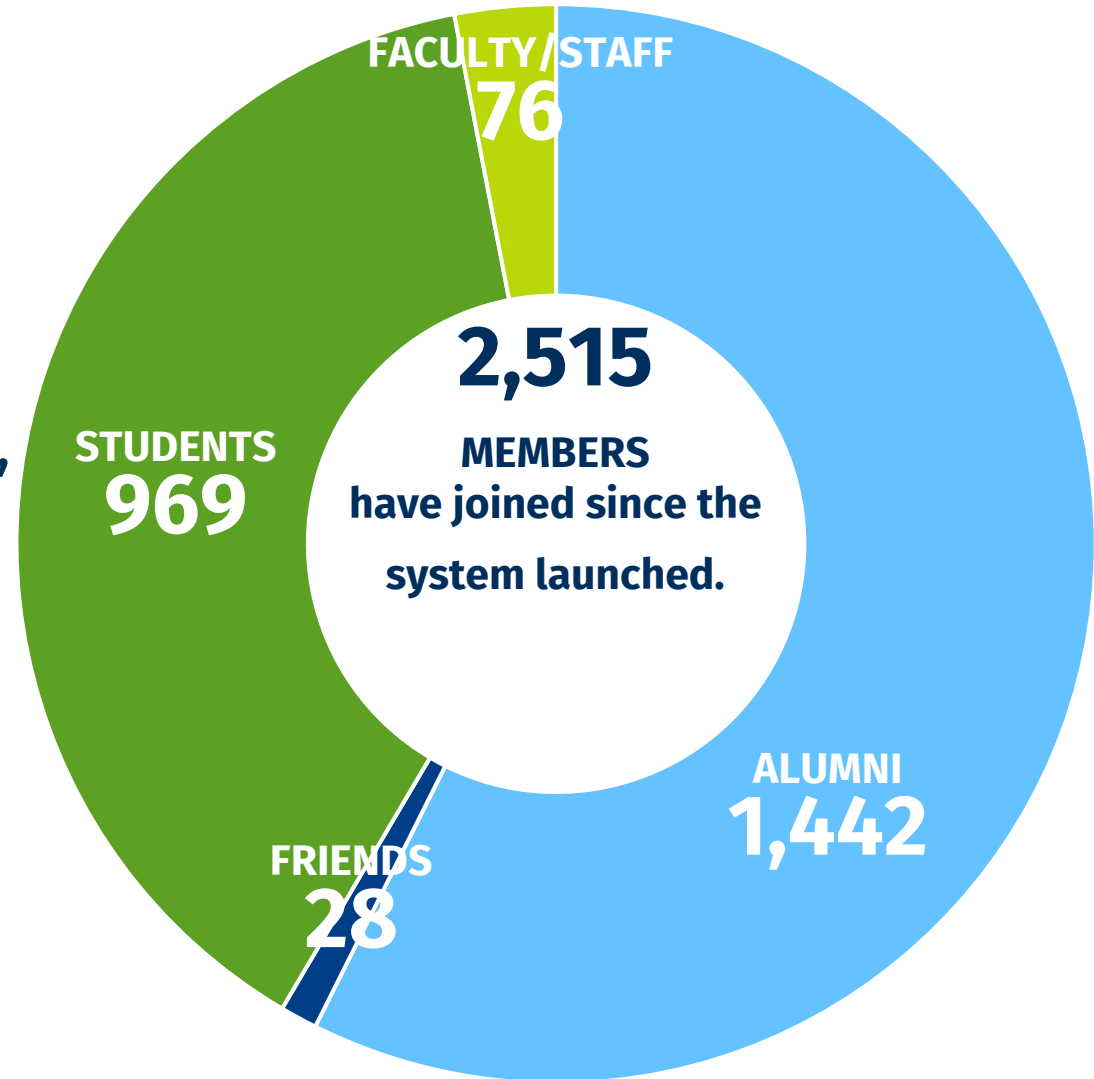


Our online community for professional connections, career growth opportunities, shared interests & mentoring opportunities.

Members have sent over 2,000 messages and made more than 600 connections.

Join today & start connecting:

**[weconnect.wvu.edu](https://weconnect.wvu.edu)**



# SIGNATURE PROGRAM



Western's sixth annual Give Day, held on May 27, 2021, generated unprecedented levels of support for our students!

A record number of donors and dollars

**2,544 DONORS** gave a total of **\$1,011,217** *(including matching funds)*

We celebrated an  
**18% INCREASE**  
in the number of gifts  
from Alumni.

We welcomed nearly  
**700 FIRST-TIME  
DONORS,**  
a 10% increase over last year.

Save the date for 2022 Give Day – Thursday, May 26th!



# WWU FOUNDATION

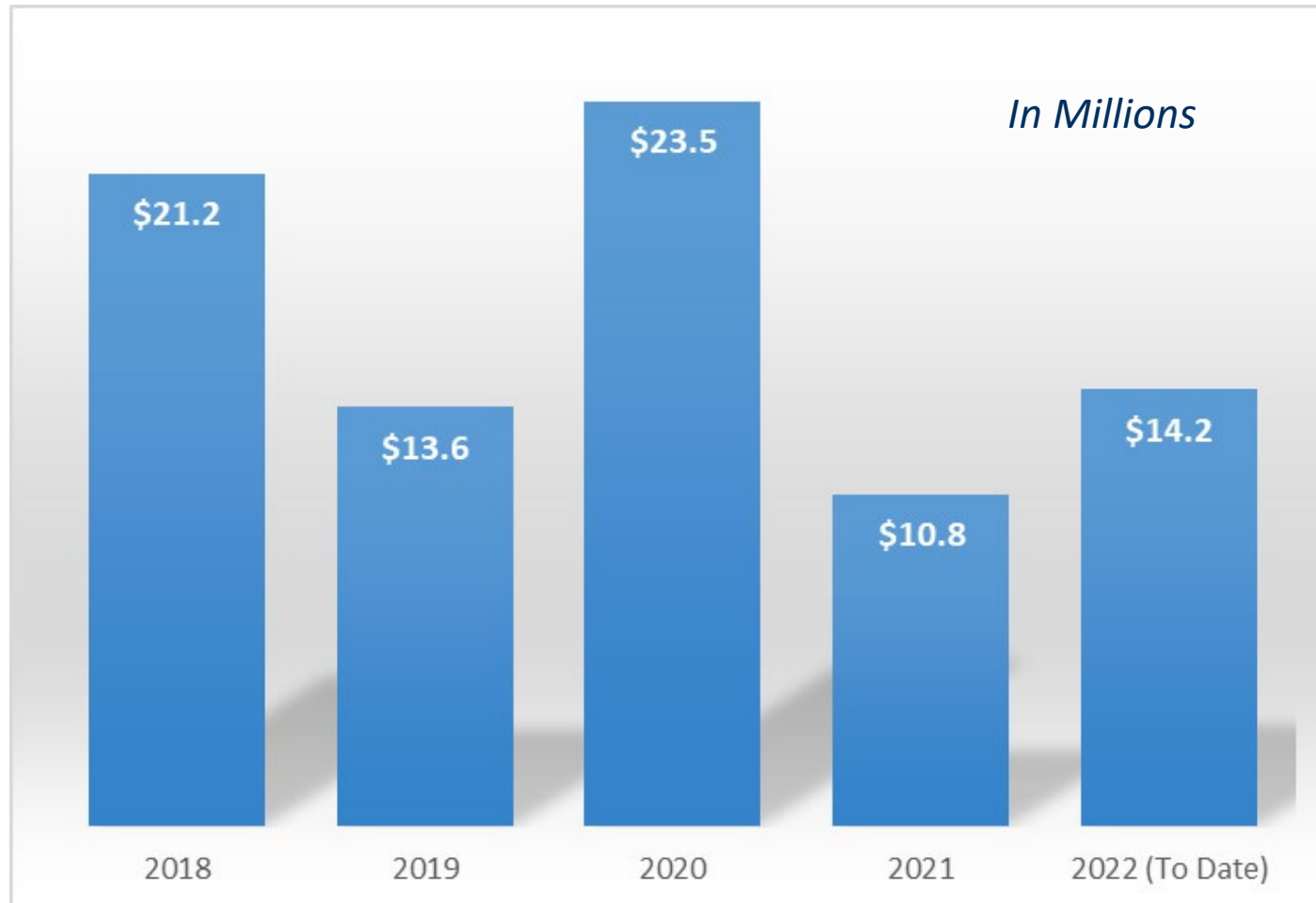
***The mission of the WWU Foundation is to inspire philanthropy that advances access, learning, and innovation at Western Washington University.***

# WWU FOUNDATION

The Foundation was established in 1966 to receive and encourage private giving to WWU. Today, donors provide nearly \$15 million annually in the form of annual, endowed, and estate gifts, and gifts in kind such as real estate, equipment, and art. Gifts fund student scholarships and provide program and faculty member support.

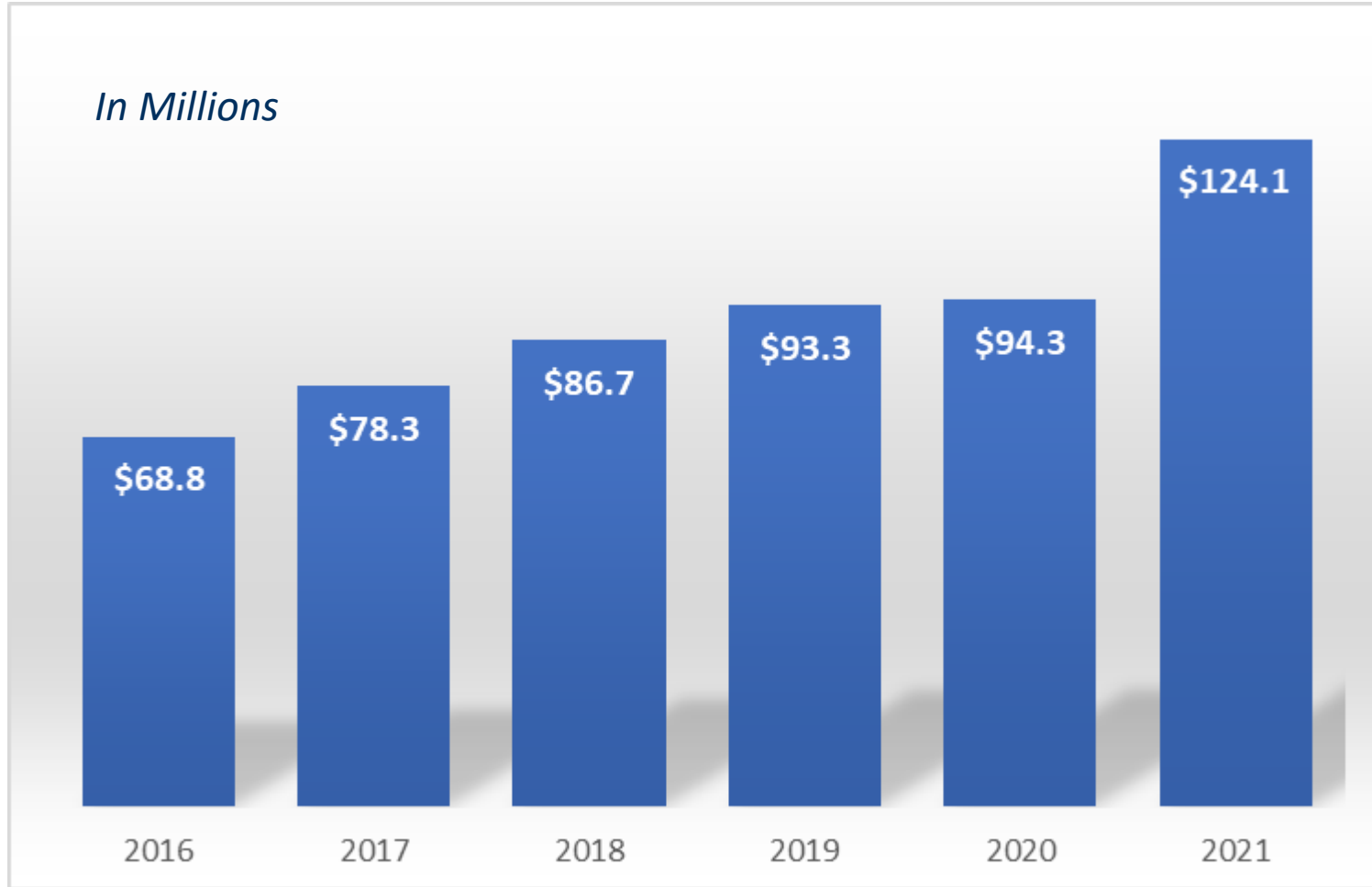
The Foundation is led by a group of dedicated board members who raise awareness of the importance of private support to public institutions. These alumni, parents, and community leaders bring their experiences in business, education, science, and non-profits, and share the common mission of engaging new friends for Western and inviting financial investments, while also stewarding the more than \$110 million in assets under the Foundation's management.

# FUNDRAISING RESULTS



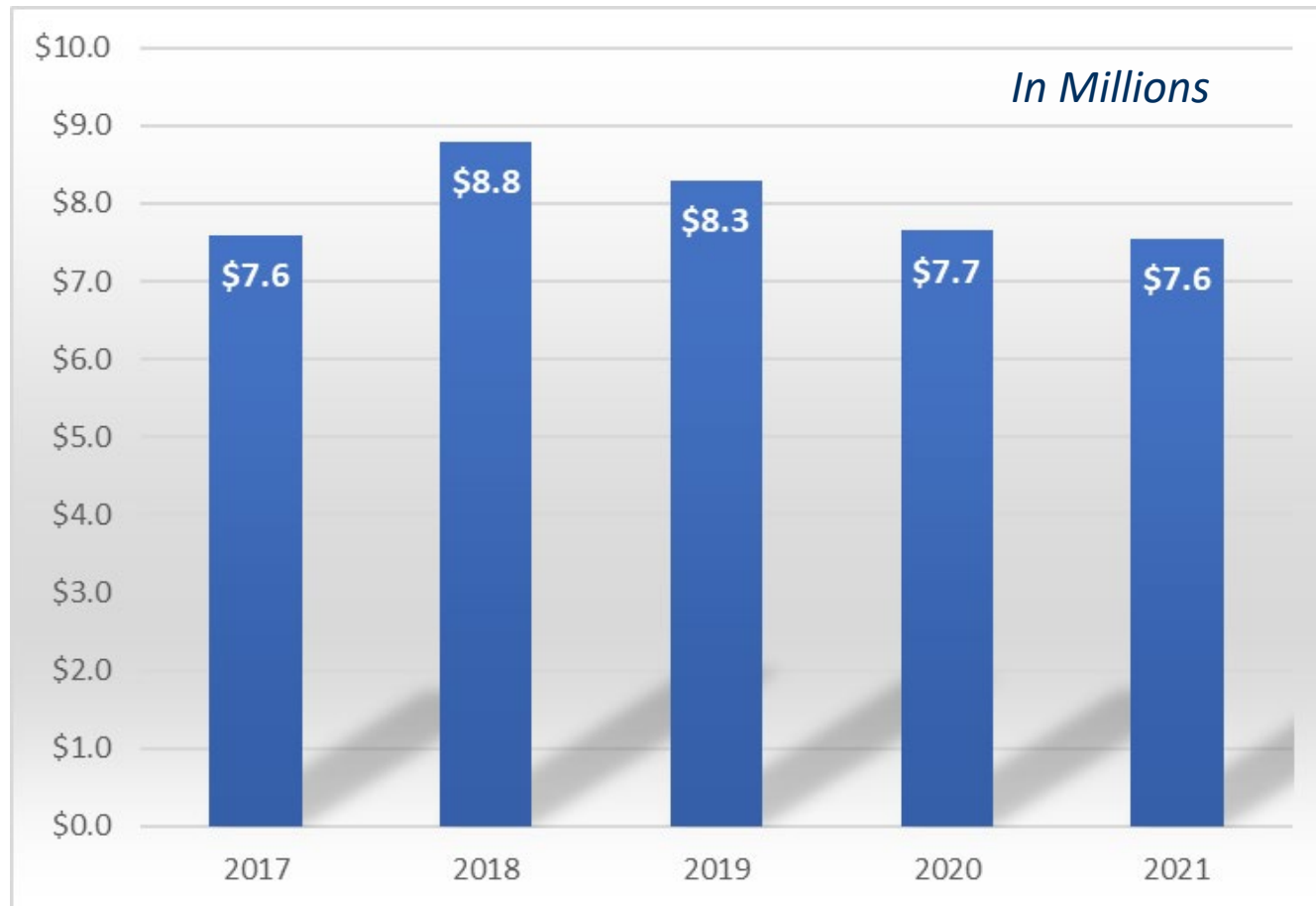
Fundraising results include all outright gifts, commitments and pledges made during the year. Note in 2020, recognition of the \$10 million gift for Kaiser Borsari Hall. Also, note results to date for 2022 are ahead of plan.

# ENDOWMENT ASSETS UNDER MANAGEMENT



Total endowment assets under management include assets owned directly by the Foundation as well as endowed assets managed by the Foundation on behalf of the University.

# SUPPORT TO THE UNIVERSITY



Due to the COVID pandemic, and the temporary reduction in University activities, support from the Foundation has dropped slightly from prior highs. As activities restart, we expect a significant return to growth in this area.

# THANK YOU

If you would like more information regarding University Advancement, the WWU Foundation, or the WWU Alumni Association, please contact:

## **Kim O'Neill**

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President & CEO of the WWU Foundation  
Executive Director of the WWU Alumni Association

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**ONE TEAM**

**OUR TEAM**



**MAKE WAVES.**