



UNIVERSITY ADVANCEMENT – WMU FOUNDATION

REPORT TO FACULTY SENATE

NOVEMBER 4, 2021





FISCAL 2021 PERFORMANCE

JULY 1, 2020 – JUNE 30, 2021



CAMPAIGN PROGRESS

January 1, 2020 – June 30, 2021

	Goal	Elapsed	Percentage
Timeline	120 Months	18 Months	15.0%
Gifts	\$1,250,000,000	\$592,261,776	47.4%

ENDOWMENT MARKET VALUE

	6/30/2018	6/30/2019	6/30/2020	6/30/2021
WMU Foundation	\$ 306,464,453	\$ 307,431,336	\$ 297,598,517	\$ 382,522,290
Paper Technology Foundation	\$ 5,807,528	\$ 5,547,014	\$ 4,990,704	\$ 6,389,351
WMed	\$ 89,598,544	\$ 94,322,672	\$ 97,707,741	\$ 111,914,508
Total MV	\$ 401,870,525	\$ 407,301,022	\$ 400,296,962	\$ 500,826,149

GIVING BREAKDOWN

Endowed Capital Expendable Presidential Unrestricted Gifts					Goal: \$35M
<i>Number in 000s</i>	Capital	Endowed	Expendable	Pr.Unrestricted	Total
FY2021	\$99.6	\$517,520.4	\$64,424.4	\$599.4	\$582,643.8
FY2020	\$1,572.2	\$11,972.1	\$16,027.5	\$1,664.2	\$31,236.0
FY2019	\$705.5	\$17,186.5	\$19,377.1	\$201.6	\$37,470.7

DONOR TYPE

Alumni Donors

	FY2018	FY2019	FY2020	FY2021
All donors	16352	15442	15375	16383
All Alumni	7755	7323	7816	9366
Degreed Undergrad Alumni*	6482	6088	6459	7603

*Degreed Undergrad alumni is significant in that it is reported each year to US News and World Report and directly affects our rating by 3% of the total score.

DONOR RETENTION

Donors who were retained from the previous FY

	FY2018	FY2019	FY2020	FY2021
All Retained Donors	10460	9170	8291	8440
1-year Retention Rate	61.01%	56.08%	53.69%	54.89%
Degreed Undergrad Alumni Donors	4301	3676	3429	3583
1-year Retention Rate	62.93%	56.71%	56.32%	55.47%

PRINCIPAL GIFT (\$1M+) DONORS

- Anonymous Donor - \$550M
 - \$50M to Bronco Athletics
 - \$200 to WMU
 - \$300M to WMed
- Rick and Louise Smalldon - \$3M Bequest to Endow Music and Business Scholarships
- Gilmore Foundation - \$2M
 - \$1.25 for Center for Advancing Art & Research
 - \$750K for Dance Studio
- Bill Johnston & Ronda Stryker - \$1.8M to Football Special Projects Fund
- Michael and Sandra Jean Reed - \$1M to Endow Need-Based Scholarships
- Anthony and Marla Smith - \$1M for Bronco Marching Band Endowment

GOALS BY FISCAL YEAR

	FY22	FY23	FY24
New Gifts & Pledges	\$40M	\$45M	\$50M
\$1M+ Donors	8	9	11
Alumni Donors	10,500	12,500	15,000
Undergrad Donors	8,000	9,500	11,000
Donor Retention	60%	65%	70%
Increased Connection Score	17,250	18,750	20,000 alumni