

Fundraising Update

Fundraising Update

- The 2018-2019 Annual Fund totaled \$2,241,684
- Successfully fulfilled the Davis Family Challenge Grant for a second year in a row. Annual fund results exceeded the prior year by 9.7% and budget by 12.1%.
- Board participation rate in the annual fund was 89% (16 of 18 board members). Overall giving by the board was down slightly.

FY20 Fundraising YTD

- As of Sept. 23, 2019-20 Annual Fund total \$947,750.
- Nearly 30% ahead of same period last year, includes a bequest of \$145,000 received in September.
- Annual fund revenue YTD without the bequest is 10% more than the same period last year.
- 4th quarter fundraising to focus on donor stewardship and recurring income by increasing alumni participation in a monthly donor program.

Fundraising Update

- Alumni participation for the annual fund was down from 30% in the previous year to 28% during the past fiscal year.
- The advancement team is looking at strategies for increasing participation among alumni, including a more relationship-based and engaging approach to fundraising by class agents, peer-to-peer giving strategies, and the focus on recurring giving.

Website

- Responsive
- Consistent Branding
- Shift – from static information to site driven by marketing objectives
- Integration with social media platforms
- Objective this year: integrate application and admissions functions
- Password protected areas of website – populated for ease of access, consistency and archiving

www.uwc-usa.org/login/trustees

Montezuma2018

Website



Trustees

LOGIN

EMPLOYEES

TRUSTEES

The Board of Trustees resources page is divided into three sections:

- General documents that board members need for every meeting and for the business of the board
- Updates from UWC International
- Documents specific to scheduled meetings of the board

Documents and materials for general board business:

- 2018-19 Trustees with contact info
- Bylaws amended May 2016
- Trustee Handbook 2018
- 2018-19 Board Committees and Terms
- Committee Responsibilities and Mandates
- 2019-20 Faculty Handbook
- 2018-19 Employee Handbook
- 2018-19 Student Handbook
- Information about safeguarding students
- UWC-USA Background for Prospective Trustees_2019
- School Calendar
- Faculty/Staff "Look Book" featuring a directory of key faculty and staff will be updated several weeks before each board meeting: [Board Look Book June 2019](#). The [faculty](#) and [staff](#) directories are also available online.

Updates from UWC International:

Campaign Planning

- **Data analysis:** donor modeling of its database
- **Review of policies** and documentation of key procedures in preparation for a campaign, including gift acceptance policy of the school.
- Conversations with key alumni and friends regarding **President's Council** to provide input around strategic goals and leadership giving for the 40 for 40 campaign.
- **Staffing** of the advancement office
- Development of **case statement**