

### Overview of Private Giving Report

The Private Giving Report reflects gifts received by the University during the period July 1, 2012 to June 12, 2013 vs. July 1, 2013 to June 12, 2014. Note that there are some \$25,000 in outstanding checks that have not been posted; therefore, actual funds raised to date is **\$2,427,786**, as opposed to the \$2,402,786 reflected on the report.

At fiscal year-end 2013, the University had raised \$1,562,691.02. With more than \$2.42 million raised to date, we've increased fundraising by \$865,095 over last year. This represents a 55% increase.

The Foundation is raising, on average, more than \$202,315 each month this year versus an average of \$130,224 raised monthly during the same period last year; an increase of more than \$72,000 per month.

Our stated fundraising goal for the year was \$2.1 million.

### Fundraising Initiatives

#### Classes in Reunion

- As of May 7, 2014, 2014 Classes in Reunion had donated **\$473,277** to the SCSU Foundation.
- In comparison, contributions for 2013 Classes in Reunion totaled \$189,444.50; in 2012 Classes in Reunion donated \$184,137.05.

#### *2014 Scholarship Gala and Tribute*

- **\$212,660** raised in gifts and pledges | 592 seats sold
  - \$187,397.50 (received and payroll deductions); \$25,262.50 (outstanding pledges)
- Last year: \$163,531 raised | 550 seats sold

#### *"Count Me In!"* Annual Fund Campaign

- \$88,077 | 237 donors | Average donation: \$371
- Last year: \$31,756 from 107 donors | Average donation: \$297

#### General Scholarship Fund

- \$55,262 | 105 donors | Avg. donation: \$526
- Last year: \$9,632 from 30 donors | Avg. donation: \$321

#### SCSUNAA Special Scholarship Drive (began last fall)

- \$38,637 | 116 donors | Avg. donation: \$333

#### Special Scholarship and Recruitment Fund Campaign with SCSU National Alumni Association (*new!*)

- \$21,815 | 94 donors | Avg. donation: \$232

#### Church Relations Campaign (began in March 2014)

- \$1,500 from 5 donors:
  - Mt. Calvary Baptist, Orangeburg, \$500; New Beginnings Church, Orangeburg, \$250; St. Paul Baptist, Orangeburg, \$250; St. Mark UME, Orangeburg, \$250; Mt. Zion Baptist Church, Bowman, \$250

#### June 27<sup>th</sup> Charity Golf Tournament at The Windermere

- \$4,500 from 4 donors thus far:

- Sodexo; UPS; Sky Logistics; Attorney Carl B. Grant; commitments from Verizon, UGL, Corporate Concepts, Capital City Classic

### **Recent Major Gifts of Note**

- \$100,000 – Gift of Retirement Fund Assets from Lewis A. Berry ('66); supporting document has been provided
- \$100,000 - Life Insurance gift from Henry F. "Hank" Allen, Jr. ('78) {policy signed; awaiting approval of the policy by the insurance company}; Hank is a Miller Society member who has already donated more than \$170,000 to the University.
- \$100,000 – Pledge from Kenneth W. Ravenell, J.D. ('81); highly successful trial attorney in Baltimore, MD; provided the keynote address during the Founders' Day program
- \$65,000 – Anonymous gift made by a local friend of the University

### **Proposals Submitted (in recent months)**

- \$1,953,605 - Belcher Hall Naming Opportunity: "School of Business" designation; requested by Dr. Barbara Adams
- \$57,753 - Belcher Hall Naming Opportunity: Auditorium; requested by Dr. Barbara Adams
- \$170,398 - Hodge Hall Annex Naming Opportunity: Entire 1<sup>st</sup> Floor, including auditorium and labs to establish a research center; requested by the Family of Dr. Lewis C. Roache
- \$75,000 – Blue Cross Blue Shield of South Carolina – 50K endowed scholarship + 25K funding for more immediate need-based tuition assistance
- \$75,000 – Cox Industries – 50K endowed scholarship + 25K funding for more immediate need-based tuition assistance
- \$50,000 – Wells Fargo Foundation – endowed scholarship
- \$50,000 – SC State Military Alumni Association – endowed scholarship
- \$5,000 – AARP – General Scholarship Fund

### **Meetings with Corporate Representatives, Top Alumni Donors and Others**

Mikie Johnson, Cox Industries; Tommy Miller, DPU; James Bennett, First Citizens Bank; Elizabeth Nquo Johnson, Blue Cross Blue Shield of SC; Ken Peterson, BI-LO; April Kelly Drummond, Denny's; Jessica Jackson, Boeing; Ken Peterson, BI-LO; CC Cooper, Dixon Golf; Rhonda Midgett, TD Bank; Hank Allen and Doug Gantt, Pfizer; \*Derek McGowan, Lockheed Martin; Mary-Catherine Burton, McDonald's; Gary Carroway, UPS; Sky Foster, BMW; #Alfred Flowers, FEDITC; Hugh Workman, Bank of America; Andre Rice, Muller and Monroe Asset Management; Rev. Solomon Jackson (lottery winner) and Robert Squirewell; Carl B. Grant, Attorney; Martin Roache (son of Dr. Lewis C. Roache); Zack McDaniels, [Givecorps.com](http://Givecorps.com).

Coach Buddy Pough re: engagement of SCSU former athletes; Chris Jenkins, Military Alumni Association; Rodney Jenkins and Robert Evans, State Club; Dr. Jesse Kinard, SCSU Real Estate Foundation; Dr. Bennetta Bell, Board of Visitors; Roger Leaks, Board of Visitors; J.C. Sanders, Miller Society; Evia Thompson ('62)

\*Persuaded Lockheed Martin to (finally!) agree to visit our University and take a look at our Engineering School in hopes that the corporation will designate SC State University as a "partner institution" which would mean tens of thousands of dollars in annual support and ongoing efforts to recruit our students for open positions at the company.

#Contacted by Colonel Alfred Flowers/FEDITC. Company has landed a \$300 million dollar federal government contract with Shaw Air Force Base in Sumter, SC and are requesting that SC State forward resumes (at least 20) of engineering students (recent graduates and those scheduled to graduate this week) for open engineering positions at SAFB. Formal job offers are expected to be made in late June/early July. Four positions are expected to be filled.

### **Other Recent Foundation Activities of Note**

Created new Miller Society and Planned Giving brochures

- MS and PG brochures were distributed to alumni in attendance at the SCSUNAA meeting held during Alumni Weekend. MS brochure has been mailed to all alumni who have donated a minimum of \$20,000 to the University; PG brochure was included in the mailer. Both brochures will be handed out at the upcoming Alumni Convention in Savannah, GA in July.

Collaborated with Faculty to compile a Wish List of departmental needs across campus in an effort to find money for specific needs in order to 1) render SC State more appealing and competitive as it strives to attract greater numbers of students to matriculate at SC State, and 2) to allow faculty to be more effective and impactful in academic instruction. The list will be shared with alumni and friends on an ongoing basis.

Signed up to teach a "University 101" class this fall to teach students the importance of philanthropy and giving back to the University

Took necessary steps to ensure that the Foundation can now accept American Express and Discover as a form of payment for making gifts to the University

Working with Dee Dee Cook, president of Orangeburg Chamber of Commerce, to host a Business Afterhours on State's campus this summer to build relationships with the local business community

Started reaching out to local non-profit organizations to ask that they consider hosting their next meeting, conference or event on SC State's campus in an effort to strengthen ties with the local community

Created a form to make it clear how alumni and others should address their check(s) when making a charitable donation to SC State

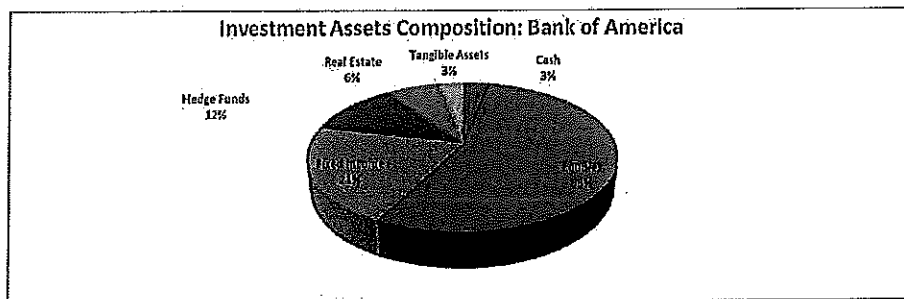
Added a more prominent, visible "Give Now!" button on the home page of the [www.scsu.edu](http://www.scsu.edu) website

SCSU Foundation, Inc  
Investment Activities  
Period: May 1st, 2014- May 31st, 2014

Investment Name	May 1st, 2014		Adjustment from prior month	Dividend/Int	Appreciation this period	Disbursement this period	Deposit	Fees this period	Ending Bal-May 31st, 2014
	FMV								FMV
Bank of America	\$ 6,292,553.76			\$ 2,633.59	\$ 84,798.41	\$ -		\$ (2,652.85)	\$ 6,377,332.91
Charles Schwab	\$ 388,637.82		\$ -	\$ 741.50	\$ (1,009.94)		\$ -	\$ -	\$ 388,369.38
CDs; Edisto Credit Union	\$ 771.01		\$ -	\$ -	\$ -	\$ -		\$ -	\$ 771.01
CDs; B&T	\$ 51,619.05		\$ -	\$ 73.00	\$ -	\$ -		\$ -	\$ 51,692.05
CDs; First Citizen	\$ 5,834.02		\$ -	\$ -	\$ -	\$ -		\$ -	\$ 5,834.02
Total assets in port folio	\$ 6,739,415.66								\$ 6,823,999.37

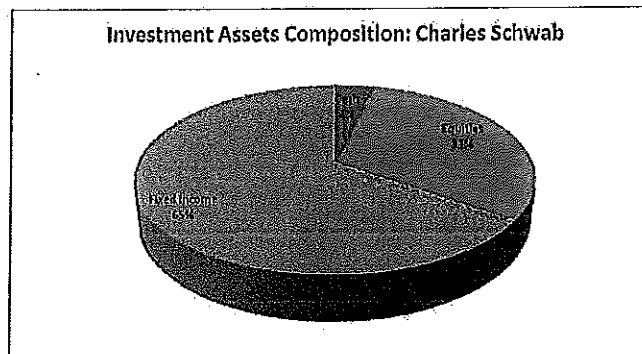
Investment Assets Composition: Bank of America

								Percentage
Cash	\$ 197,852.19							3.10%
Equities	\$ 3,474,945.57							54.49%
Fixed Income	\$ 1,332,139.24							20.89%
Hedge Funds	\$ 763,264.36							11.97%
Real Estate	\$ 410,733.88							6.44%
Tangible Assets	\$ 198,397.67							3.11%
Total	\$ 6,377,332.91							100.00%



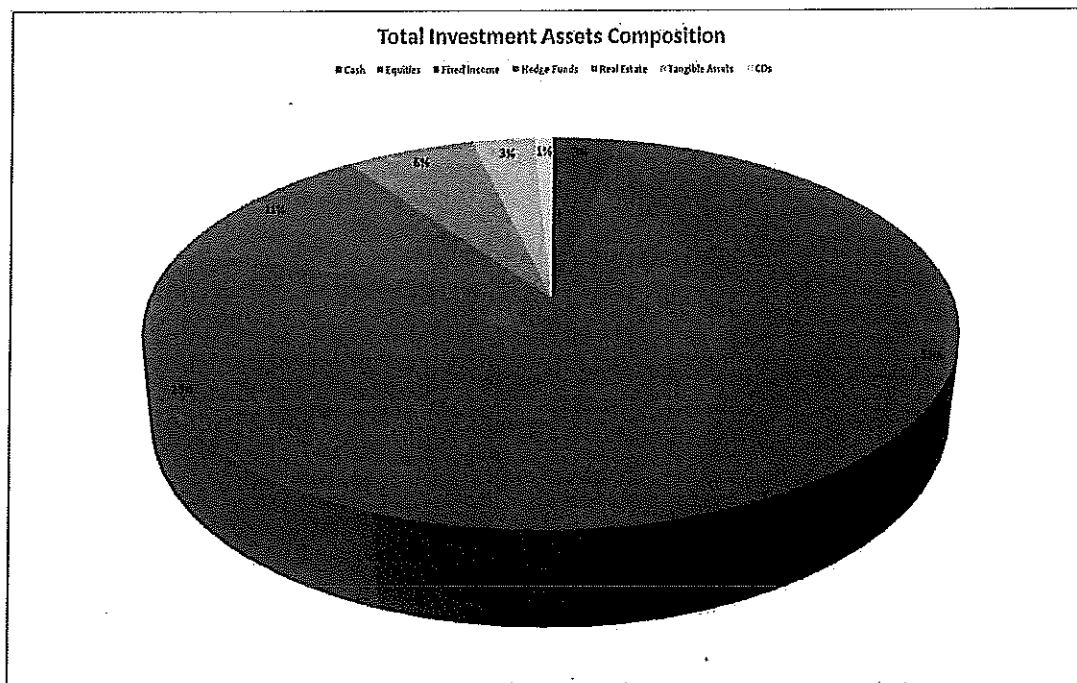
Investment Assets Composition: Charles Schwab

Cash	\$ 14,048.71						3.62%
Equities	\$ 121,122.16						31.19%
Fixed Income	\$ 253,198.51						65.20%
Total	\$ 388,369.38						100.00%



Total Investment Assets Composition

Cash	\$	211,900.90								3.11%
Equities	\$	3,596,067.73								52.70%
Fixed Income	\$	1,585,337.75								23.23%
Hedge Funds	\$	763,264.36								11.19%
Real Estate	\$	410,733.88								6.02%
Tangible Assets	\$	198,397.67								2.91%
CDs	\$	58,297.08								0.85%
Total	\$	6,823,999.37								100.00%



INVESTMENTS ANALYSIS-Jan. 1st, 2014 through May 31st, 2014					
	FMV-01/01/2014	Div., Int., Apprec	Fees	(Disbursement)	FMV-5/31/2014
Bank of America	\$ 6,228,100.25	\$ 162,562.78	\$ (13,330.12)	\$ -	\$ 6,377,332.91
Charles Schwab	\$ 406,603.29	\$ (15,922.30)	\$ (2,311.61)	\$ -	\$ 388,369.38
CDs	\$ 58,224.08	\$ 73.00			\$ 58,297.08
Total	\$ 6,692,927.62	\$ 146,713.48	\$ (15,641.73)	\$ -	\$ 6,823,999.37

# South Carolina State University Foundation, Inc.

Assets as of 05/31/2014

## ASSETS:

### Current Assets:

Bank of America - Sweep	\$844,366.00	
Bank of America - Operating account	\$53,343.00	
Total current assets		\$897,709.00

### Assets in investments:

Bank of America Investments	\$6,377,333.00	
Charles Schwab	\$388,369.00	
BB&T Accounts	\$51,619.00	
First Citizens Accounts	\$5,834.00	
Edisto Credit Union	\$771.00	
Total assets in investments		\$6,823,926.00

Pledge Receivable:	\$23,239.00	
Total receivables		\$23,239.00

### Fixed assets:

LAND	\$23,700.00	
Art Works	\$457,524.00	
Total fixed assets		\$481,224.00
Total assets	\$	<u>\$8,226,098.00</u>

## LIABILITIES AND NET ASSETS:

Accounts payable-salaries reimbursement to University	\$15,864.00	
Non endowment-temporary restricted	\$3,435,512.00	
Endowment-permanently restricted	\$4,774,922.00	
Total liabilities and net assets		<u>\$8,226,098.00</u>

### Total Assets

\$8,074,775.27

### Liabilities and Fund Balance

Liabilities	
2-2150 Payroll Liabilities - Other	\$292.81
2-2160 FICA/Fed Withholding	(\$1,549.07)
2-2165 SC Withholding	(\$148.94)
2-2200 Due to SCSU	\$0.00
3-2110 Accounts Payable	\$0.00
Total Liabilities	<u>\$180.40</u>

### Fund Balance

1-3400 Fund Balance	\$1,546,829.81
2-3400 Fund Balance	\$2,801,269.77
3-3400 Fund Balance	\$3,726,495.29
Total Fund Balance	<u>\$8,074,594.87</u>

### Total Liabilities and Fund Balance

\$8,074,775.27

**Scholarships awarded through the Foundation to SC State students  
January 2011 through May 2014**

Scholarships awarded from the Foundation during this period totaled \$2,841,651.00 as follows:

<u>Year</u>	<u>Amount</u>
2011	\$ 1,136,021.00
2012	\$ 1,009,810.00
2013	\$ 491,806.00
2014	\$ 204,014.00
	<u>\$ 2,841,651.00</u>