

Campus Finance and Administration Representatives Meeting

April 30, 2013



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Advancement & Capital Campaign Overview

Presenter: Emily Neese, Associate Vice-President, Advancement Strategy & Operations

Facilitated Discussion: Gift Accounting and Reporting

Presenter: Wendy Harper, Assistant Director, Endowment

Procurement Fiscal Year-End Dates to Know

Presenter: Mary Cranfill, Executive Director, Procurement Services

Upcoming Finance Training Opportunities

Advancement Overview

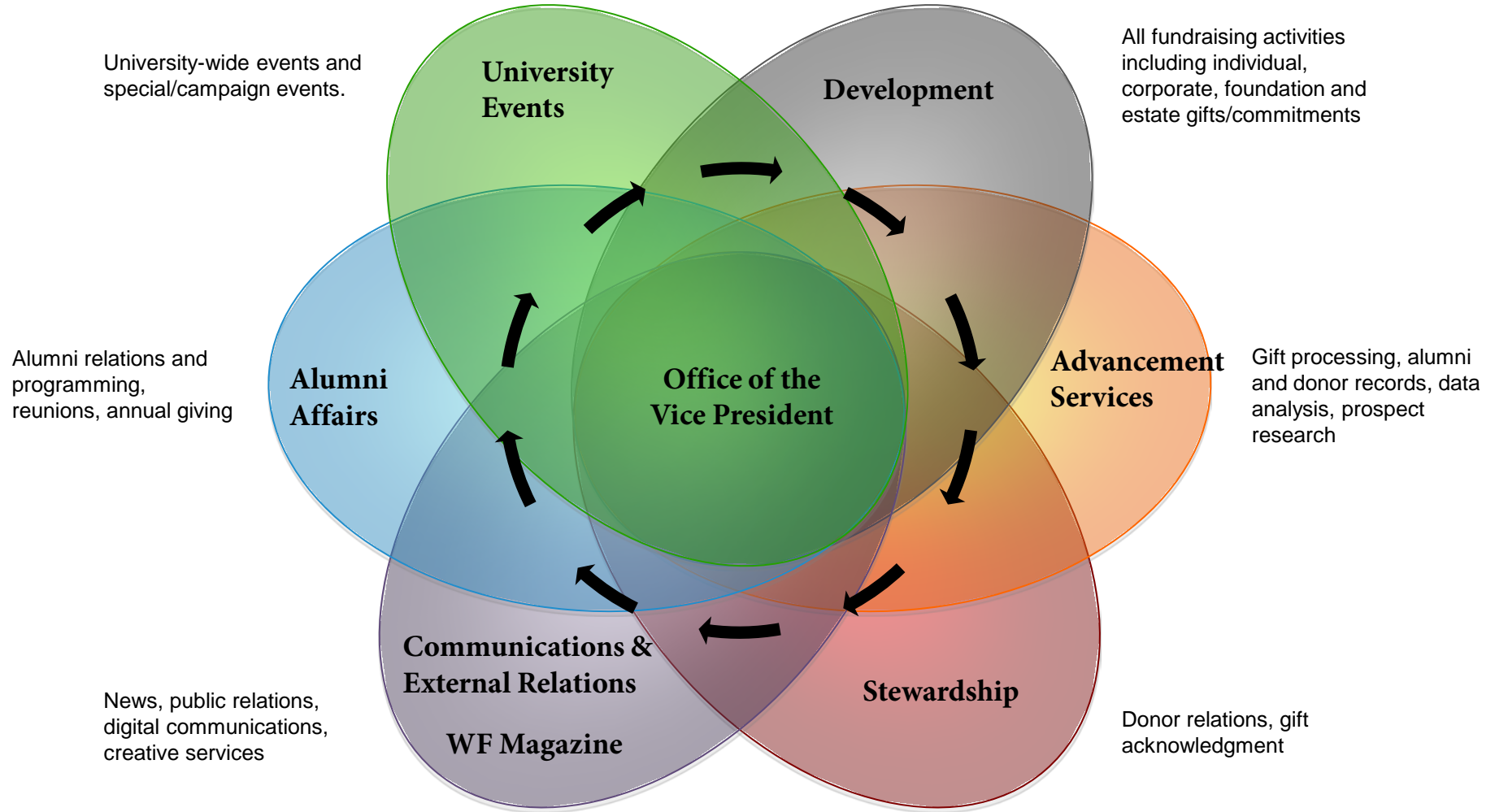
Campaign 101

Emily G. Neese

Associate Vice President, University Advancement



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Strategic initiative undertaken by
leadership in partnership with
stakeholders to activate philanthropy
in order to transform the
organization in preparation for the
future

2009-2010

2011-2013

2014-2018

Pre-Campaign

Quiet Phase

Public Phase

**Planning
Year**

Assess & bolster Wake Forest

Identify potential future donors and Trustees

Create prospectus & execute feasibility study

Launch Campaign working Group

Secure multi-year Campaign budget

**Early Quiet
Phase**

Launch Quiet Phase themes & signature funding priorities

Define College and Units top needs

Define volunteer structure & recruit leadership

Launch Campaign Cabinet

**Late Quiet
Phase**

Draft and test Campaign case statements

Recruit Campaign volunteer structure

Develop national rollout strategy

Set financial goal

Finalize Campaign plan

**Early Public
Phase**

Public launch to announce goal and celebrate leadership gifts

Broaden the audience for the Campaign and disseminate case statement to all constituents

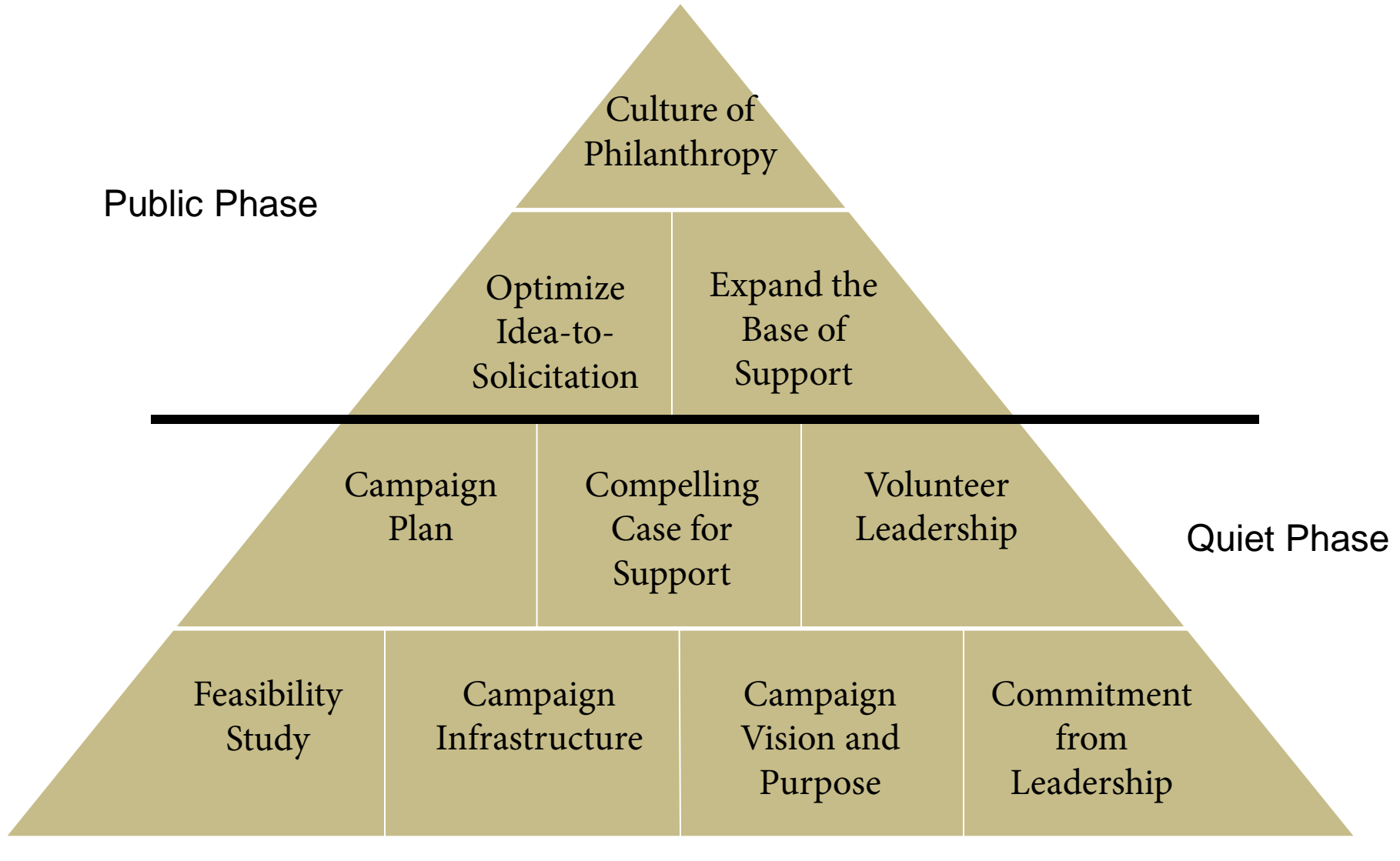
Activate volunteers

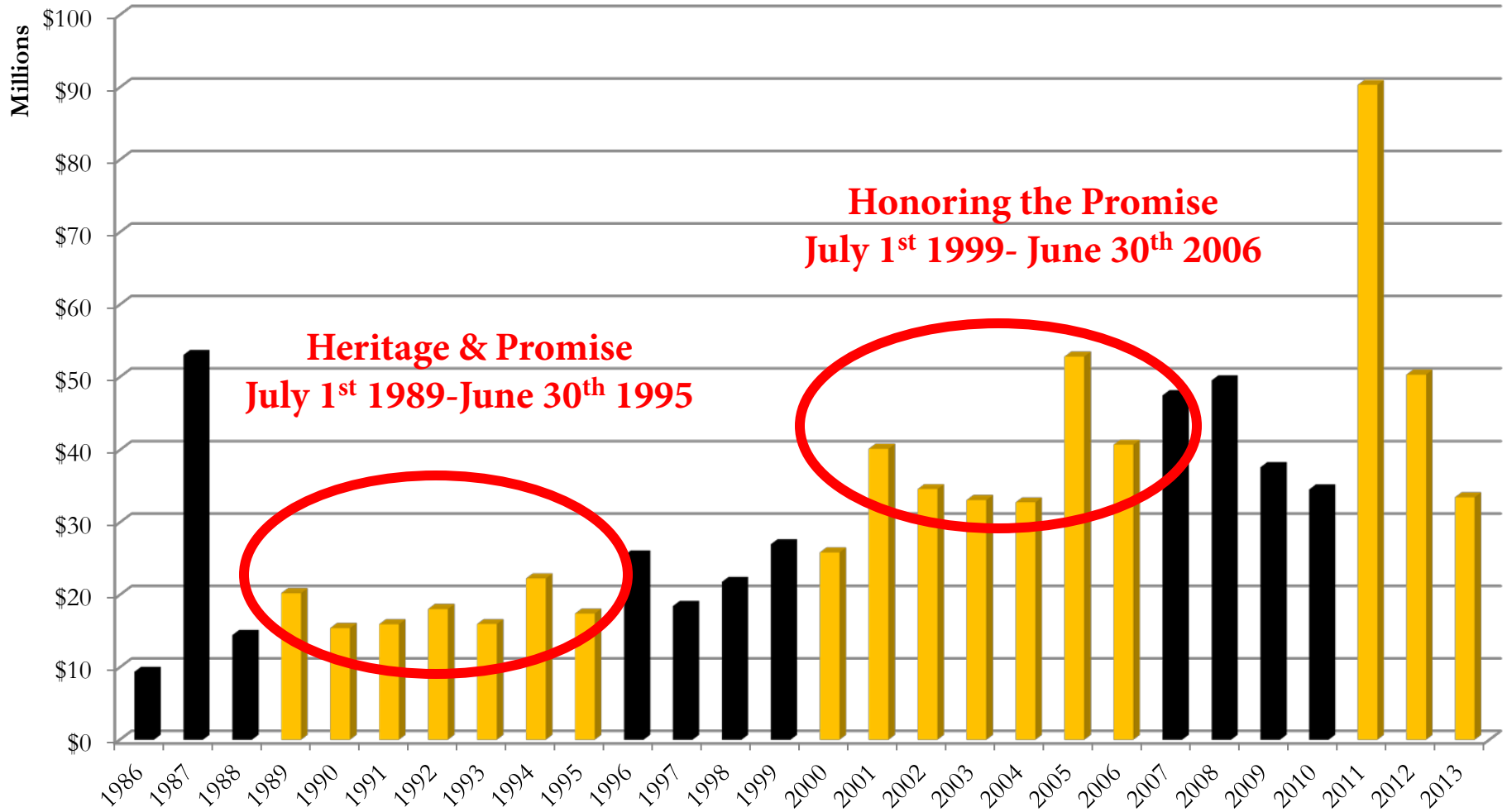
**Late Public
Phase**

Achieve the goal and celebrate the impact of the Campaign

Increase the Campaign reach to emphasize donor participation

Prepare the organization to transition out of Campaign



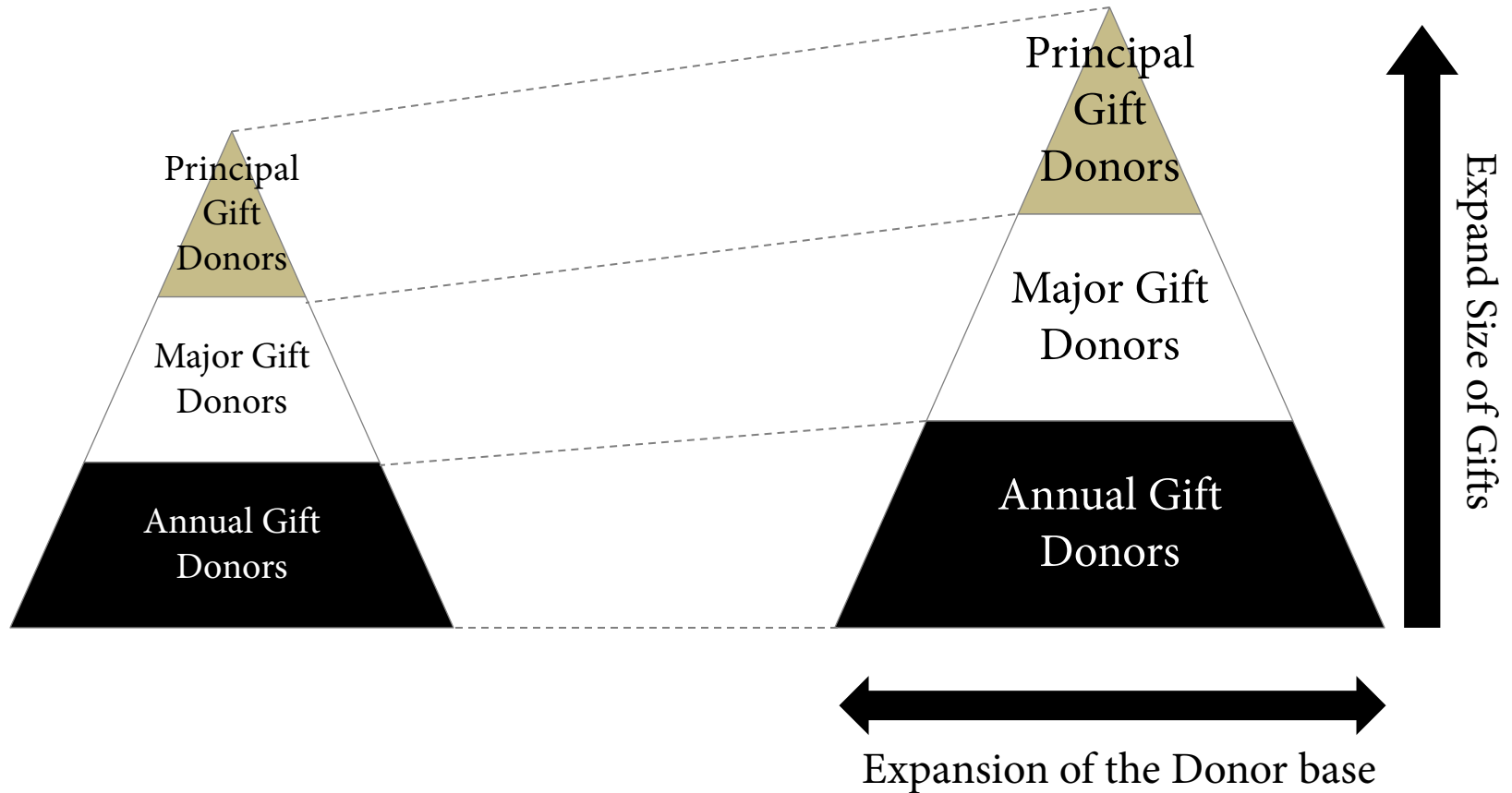


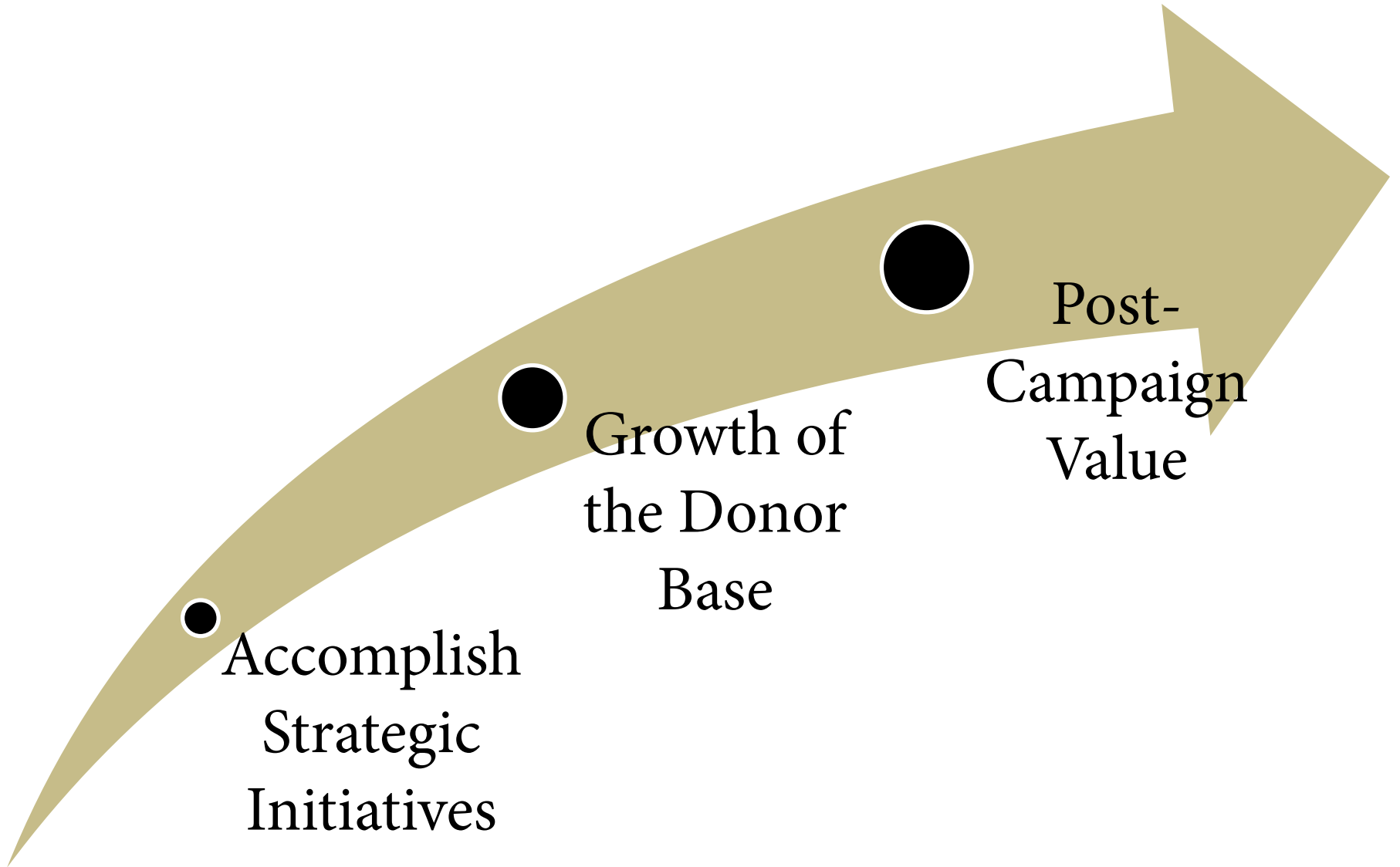
Previous Campaigns build the foundation for the future

Campaigns Grow the Base of Support

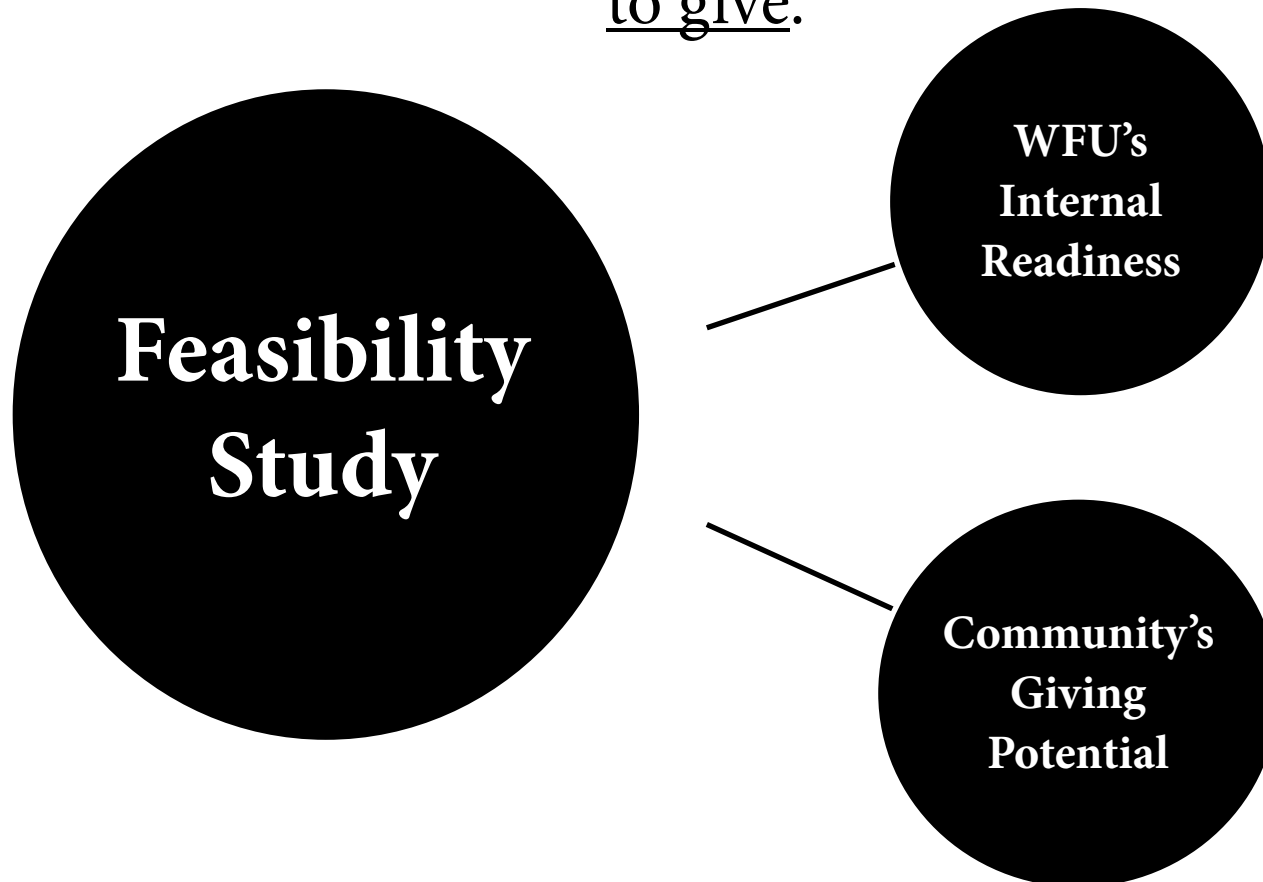
Start of Campaign

End of Campaign





A thorough examination of Wake Forest's readiness to ask and the community's preparedness and willingness to give.



Relationship

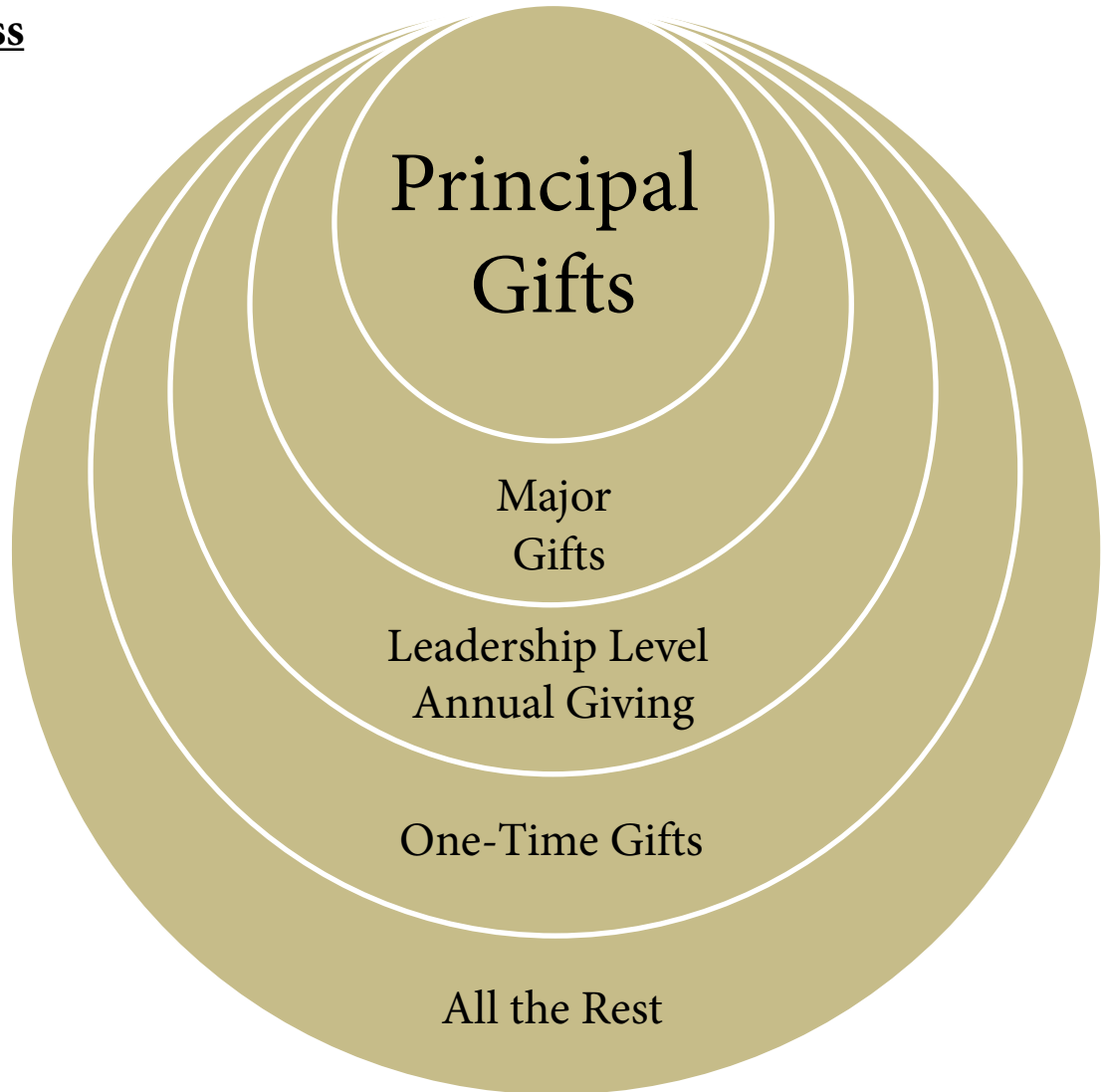
Willingness
to Give

Know
Well

Highest

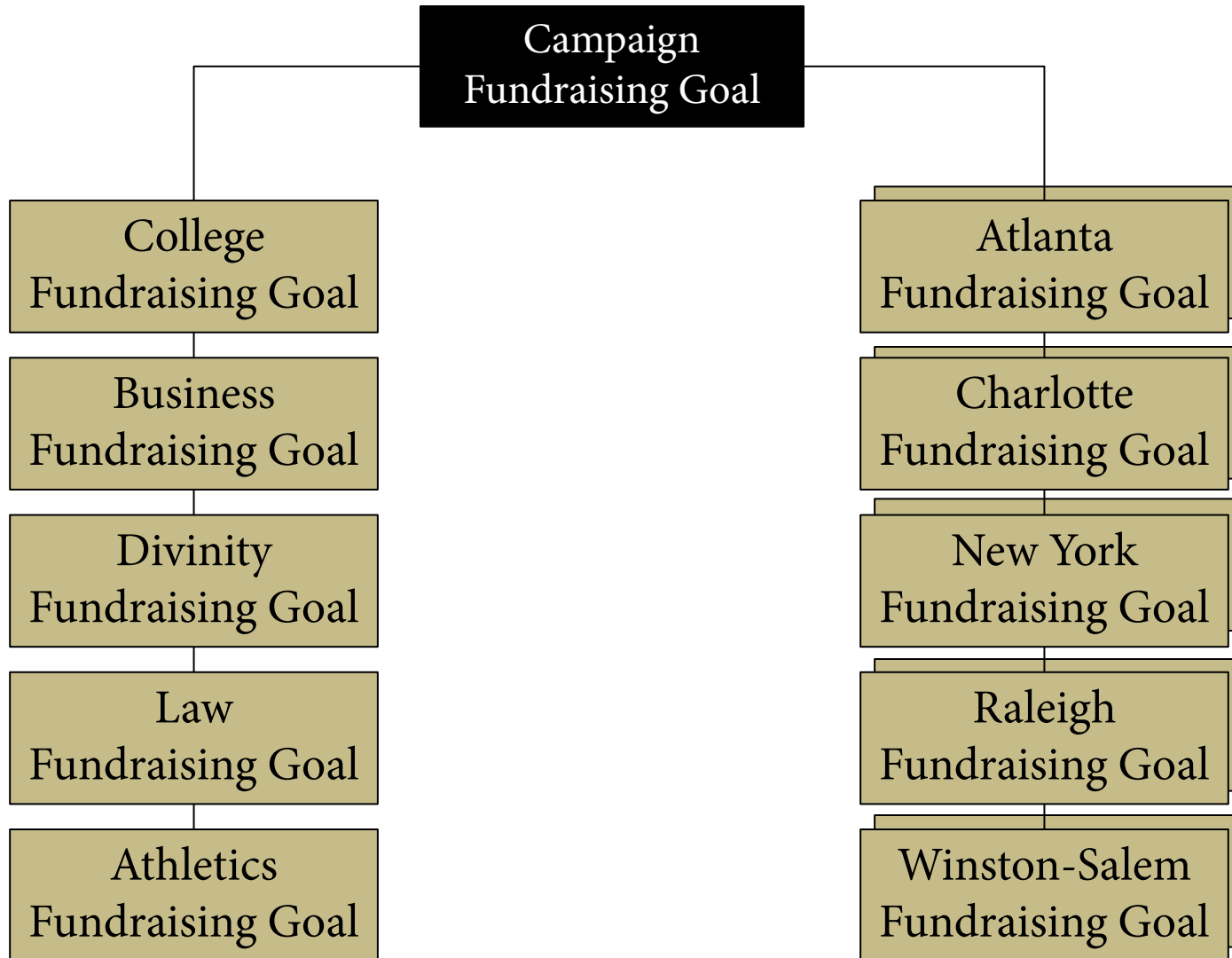
Know

Know
Least

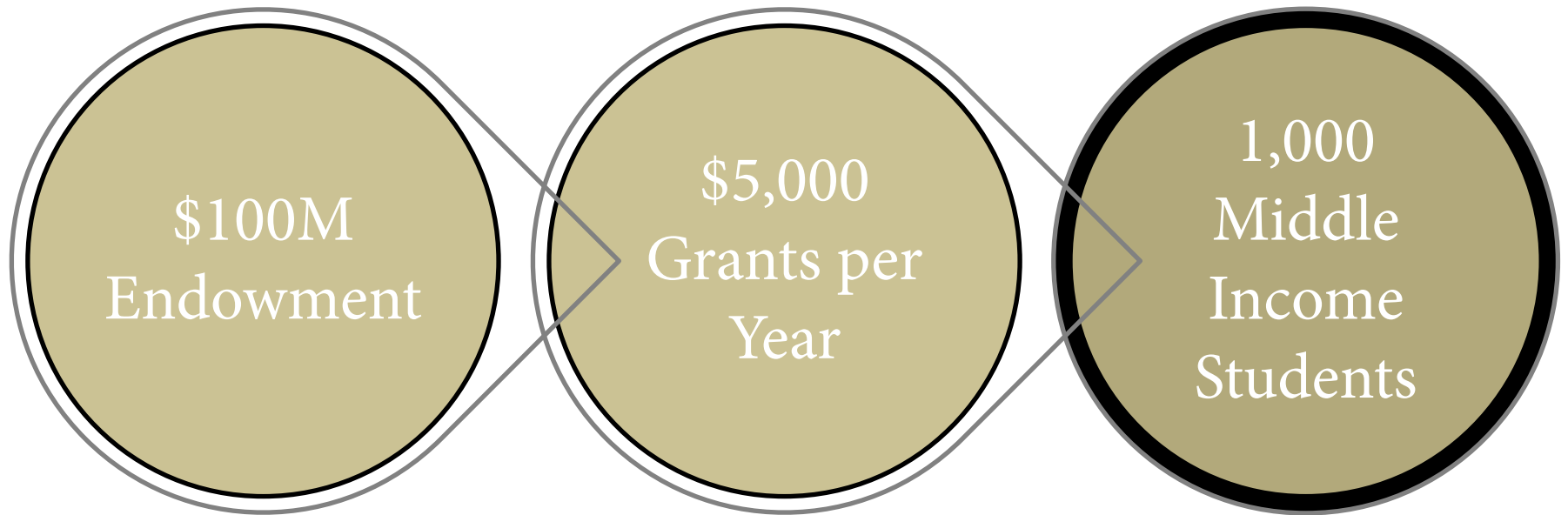


We will launch an effort that will:

- Engage hundreds of volunteers across the nation
 - Attract more than 2,000 major gifts
 - Capture more than 10,000 new donors
 - Identify future leaders of our Boards and Councils, including the Board of Trustees
 - Add approximately \$200 million to our endowment
 - Dramatically increase our financial aid funds
 - Attract critical resources for our faculty
 - Build new facilities
 - Solidify our position as the nations premiere collegiate university
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- **Campaign priorities for individual schools and units are still in draft form. Fundraising projects and priorities will be finalized in the summer of 2013.**
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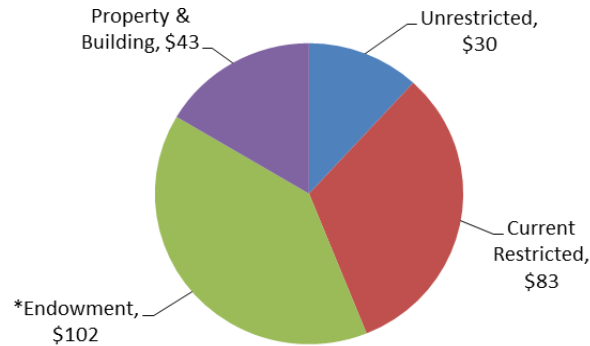
Reynolds Gymnasium will be renovated to better serve Health Exercise Sciences, Student Health Services, Athletics, and Student Recreation.



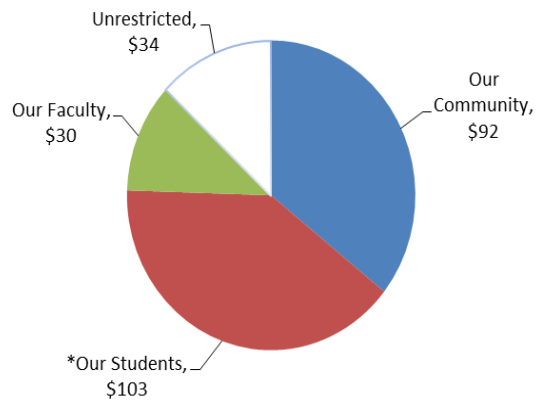


Character and Leadership Development has arisen as a theme throughout the Campaign funding priorities. The Schools of Business, Divinity School, and Office of Personal and Career Development all have funding priorities surrounding Character and Leadership Development.

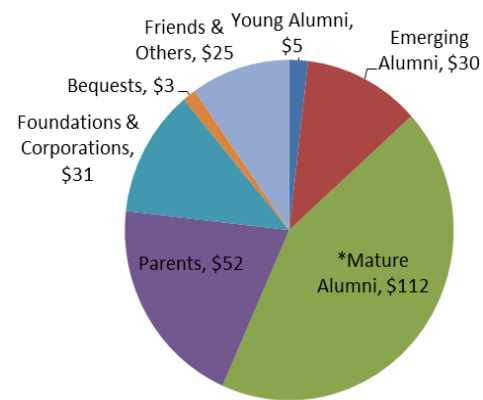
Revenue to Date by Classification
(In millions of dollars)



Revenue by Strategic Initiative
(In millions of dollars)



Revenue To Date by Audience Segment
(In millions of dollars)



* Includes Porter Byrum Gift

The biggest role YOU can play is being knowledgeable about the Campaign

- 1. Know the Case for the Campaign**
 - 2. Know the total Campaign goal**
 - 3. Be able to articulate a few of the Campaign's main funding priorities**
 - 4. Be knowledgeable about the major, upcoming Campaign milestones**
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All gifts must be processed by Advancement to ensure a gift receipt is issued and donor receives proper credit.

Cash/Checks:

- **Deliver to Alumni Hall – Office of Records & Gifts**
- **Note gift designation - Advancement does not use RC numbers. If designation is unknown, contact Anne Hodges (6080) or Shawna Potts (6087).**
- **Do not take gifts to cashier's window.**

Gifts in Kind:

- **Contact Anne Hodges (6088) for guidance. Specific guidelines apply when accepting and acknowledging gifts in kind.**
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Procurement Fiscal Year End Dates to Know

Mary Cranfill

Executive Director, Procurement Services



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Friday, May 3rd—Deadline for all Request for Proposals (RFP's) or Bids. Deadline for all furniture and vehicle purchase requests. Requests after this date cannot be guaranteed to meet the June 30th deadline.

Friday, June 7th—Deadline to set up a new supplier. Please contact Procurement Services to verify we do not have an existing supplier under contract or discount structure which can meet your needs before requesting a new supplier.

Monday, June 24th—Deadline for submission of approved purchase requisition through Deacon Depot. All goods and services must be received by Friday, June 28th.

Monday, July 1st—Close of P-card statement. Transactions must post by this date. NOTE: Swiping your card or providing a number to the merchant by June 30th does not guarantee the transaction will post by July 1st.

Tuesday, July 9th—All P-card transactions must be updated in Works and statements with appropriate documentation received by AP

Finance Training Updates



<u>Deacon Depot</u>		
Thursday, May 9 th	Brown Bag Q&A <i>*beverages & dessert provided</i>	12:00 pm
Thursday, May 16 th	User Learning Session	2:00 pm
<u>Evolution of a Journal Entry</u>		
Wednesday, May 8 th		3:00 pm
Thursday, May 23 rd		3:00 pm
<u>NOVAtime</u>		
Tuesday, May 14 th	Supervisors	9:00 am
Tuesday, May 14 th	Non-Exempt Staff & Students	11:30 am
<u>University Credit Card Training</u>		
Tuesday, May 14 th		2:00 pm
Wednesday, May 29 th		9:00 am

Thursday, May 16th

2:30 – 4:00 pm

ZSR Library Auditorium
