

Antioch College  
Office of Institutional Advancement  
Narrative Report  
October – December, 2006

Submitted by: Tom Wamsley, VP of Institutional Advancement

Activities in the Office of Institutional Advancement during the months of October through December, 2006 focused on filling open IA staff positions, completing the conversion of our alumni/donor database, conducting individual donor visits and increasing alumni engagement. Specific initiatives included:

- Raiser's Edge went live on 10/2/2006. Since that time, we have updated approximately over 10,000 alumni/donor records via Alumni Finder and continue the process of correctly re-entering hundreds of multi-year pledges for purposes of accurate cash flow reporting.
- The final vacant IA staff position, Gift Recorder, was filled by Karen Beyer on 11/13/06. This is first time the IA department as been fully staffed in over two years.
- New Alumni Chapter meetings were held in Yellow Springs, Chicago, Santa Fe, Washington, DC attracting 173 alumni attendees. The Alumni Relations staff assisted the Boston Chapter with creating a Peace Panel discussion in October which attracted 46 alumni. A guest speaker was featured at each of the events. Speakers included: Steve Lawry, Tom Haugsby and Dan Gediman.
- Chapter events have been scheduled for Seattle (Jan. 28<sup>th</sup>) and New York City (Mar. 21<sup>st</sup>). Our plan to establish eight new chapters is on track and will be completed by the end of the fiscal year as seven chapters have been launched or have launch schedules. The last chapter site is Los Angeles and we are in the process of identifying leadership.
- The Alumni Board Meeting was held on October 19-21<sup>st</sup> which was attended by 22 of the 28 board members. Highlights of the weekend were: (1) The presentation of the Rebecca Rice Award to Cliff Robertson. The award ceremony was opened up to the community and there were 54 people in attendance. (2) A strategic planning session, during which the following goals were established:
  - Increase the number of chapters;
  - Recruit and train class representatives;
  - Create communication tools between the board and alumni;
  - Plan and assist with an annual reunion

- Reunion Weekend has been scheduled for June 21 – 24, 2007. Save the Date postcards were mailed the second week of December.
- Over 40 cultivation and solicitation donor contacts were made by the IA VP and President Lawry. There are over \$700k in asks currently being considered. Over \$300k in planned/estate gifts in the process of being closed. The Director of Alumni Relations submitted and was awarded a \$160k matching grant request to the Morgan Family Foundation for Glen Helen. A \$25k gift was secured as a result of our IRA distribution letter from Art Zucker.
- Major Gift officers conducted over 60 personal visits and significant donor contacts.
- The alumni directory process was conducted, and the printed version will be distributed in March, 2007. Approximately 5,000 alumni participated in the process and will be included in the directory.

# Antioch College

## 3-Year Comparison

July 1 - December 31

| Campaign                                                                                                           | Dollars Received YTD | # of Gifts YTD | Pledge Dollars Due YTD | # of Pledges Due YTD | Total Dollars Committed YTD |
|--------------------------------------------------------------------------------------------------------------------|----------------------|----------------|------------------------|----------------------|-----------------------------|
| <b>FY07</b> (Annual Participation to-date = 15.0%)                                                                 |                      |                |                        |                      |                             |
| Annual Fund - Unrestricted                                                                                         | \$566,304            | 1,768          | \$140,712              | 240                  | \$707,016                   |
| Annual Fund - Restricted                                                                                           | \$22,964             | 20             | \$5,000                | 1                    | \$27,964                    |
| Capital Campaign 2006                                                                                              | \$114,996            | 23             | \$1,328,410            | 7                    | \$1,443,406                 |
| Scholarships                                                                                                       | \$115,782            | 19             | \$41,600               | 6                    | \$157,382                   |
| Endowments                                                                                                         | \$250                | 1              | \$2,000                | 1                    | \$2,250                     |
| Capital Campaign 2001                                                                                              | \$62,160             | 21             | \$333,925              | 9                    | \$396,085                   |
| Glen Helen                                                                                                         | \$231,492            | 199            | \$1,299                | 3                    | \$232,791                   |
| Special Projects/Campus Initiatives                                                                                | \$3,476              | 4              | \$3,700                | 2                    | \$7,176                     |
| <b>FY07 TOTALS</b>                                                                                                 | <b>\$1,117,424</b>   | <b>2,055</b>   | <b>\$1,856,646</b>     | <b>269</b>           | <b>\$2,974,070</b>          |
| <b>FY06</b> (Annual Fund Participation to-date = 12.3%)                                                            |                      |                |                        |                      |                             |
| Annual Fund - Unrestricted *                                                                                       | \$596,830            | 1,647          | \$191,598              | 102                  | \$788,428                   |
| Annual Fund - Restricted                                                                                           | \$102,173            | 31             | \$400                  | 1                    | \$102,573                   |
| Scholarships                                                                                                       | \$1,050              | 4              | \$500                  | 1                    | \$1,550                     |
| Endowments **                                                                                                      | \$776,209            | 36             | \$33,735               | 5                    | \$809,944                   |
| Capital Campaign 2001 **                                                                                           | \$1,429,945          | 63             | \$382,868              | 18                   | \$1,812,813                 |
| Glen Helen                                                                                                         | \$148,679            | 113            | \$8,449                | 6                    | \$157,128                   |
| Special Projects/Campus Initiatives                                                                                | \$3,500              | 1              | \$200                  | 1                    | \$3,700                     |
| <b>FY06 TOTALS</b>                                                                                                 | <b>\$3,058,386</b>   | <b>1,895</b>   | <b>\$617,750</b>       | <b>134</b>           | <b>\$3,676,136</b>          |
| * Includes \$100K AF gift from REDACTED which converted to \$1.3M in CC2006 pledge in FY06                         |                      |                |                        |                      |                             |
| ** Includes \$879,414 from REDACTED, \$750,00 from REDACTED Estate and \$379,999 from REDACTED (\$2,009,413 total) |                      |                |                        |                      |                             |
| <b>FY05</b> (Annual Fund Participation to-date = 13.7%)                                                            |                      |                |                        |                      |                             |
| Annual Fund - Unrestricted *                                                                                       | \$567,224            | 1,751          | \$141,626              | 221                  | \$708,850                   |
| Annual Fund - Restricted                                                                                           | \$129,988            | 46             | \$0                    | 0                    | \$129,988                   |
| Scholarships                                                                                                       | \$4,729              | 3              | \$8,000                | 1                    | \$12,729                    |
| Endowments **                                                                                                      | \$76,759             | 48             | \$5,100                | 10                   | \$81,859                    |
| Capital Campaign 2001 **                                                                                           | \$4,727,037          | 69             | \$275,176              | 15                   | \$5,002,213                 |
| Glen Helen                                                                                                         | \$46,715             | 114            | \$7,750                | 5                    | \$54,465                    |
| Special Projects/Campus Initiatives                                                                                | \$0                  | 0              | \$0                    | 0                    | \$0                         |
| <b>FY05 TOTALS</b>                                                                                                 | <b>\$5,552,452</b>   | <b>2,031</b>   | <b>\$437,652</b>       | <b>252</b>           | <b>\$5,990,104</b>          |
| * Includes \$100K AF gift from REDACTED which converted to \$1.3M in CC2006 pledge in FY06                         |                      |                |                        |                      |                             |
| ** Includes \$4.21M from REDACTED, \$500K from REDACTED, \$1.077M from REDACTED (\$5.787M total)                   |                      |                |                        |                      |                             |