



**Institutional Advancement Committee
Agenda
Friday, April 29, 2022
8:00 a.m. | Chandler Boardroom**

- Call to Order Julie Johnson, Chair
- Introduction of Guests of the Centennial Campaign Committee and the Bluefield University
Advisory Council Members Julie Johnson
- Opening Prayer
- Approval of Minutes Julie Johnson
- Board Report Review Joshua Cline, Vice President
- Go Further: The Centennial Campaign for Bluefield University Update* Joshua Cline
- Marketing Review Joshua Cline
- General Discussion Committee
- Closing Prayer

Institutional Advancement

Mrs. Julie Johnson, Chair
Dr. Jeff Bloomer
Mr. Brandon Caldwell
Rev. Rodney J. Hale
Rev. Ron Hall
Mr. Robert "Bob" Houck

Mr. Jackson E. Reasor, Jr.
Mr. Tom Scott
Mr. Joshua D. Cline, *ex-officio*
Mrs. Cathy Payne, *ex-officio*
Dr. Jessica Sharp, Faculty Representative
Mr. Pablo Maldez, SGA Representative



**Minutes from the Institutional Advancement Committee Meeting
October 22, 2021**

Call to Order and Opening Prayer:

The Fall 2021 convening of the Bluefield University Board of Trustees Institutional Advancement Committee was called to order at 8:09 a.m. on Friday, October 22, 2021 in the conference room of the Advancement/Alumni House and via Zoom by Chairperson Julie Johnson. Rev. Rodney Hale opened the meeting with prayer. Guests from the Centennial Committee were welcomed.

Present:

Mrs. Julie Johnson, Chair
Dr. Jeff Bloomer, Committee member
Rev. Rodney J. Hale, Committee member
Rev. Ron Hall, Committee member
Mr. Jackson E. Reasor, Jr., Committee member
Mr. Robert “Bob” Houck, Committee member
Mr. Brandon Caldwell, Committee member
Mr. Joshua D. Cline, Vice President of Institutional Advancement
Mr. Jacob Key, Associate Vice President for Institutional Advancement
Mr. Hal Keen, Director of Planned Giving
Mrs. Rebecca Kasey, Director of Public Relations and Marketing
Mrs. Cathy Payne, Campaign Committee Chair
Dr. Jessica Sharp, Faculty Representative
Mr. Pablo Maldez, SGA Representative

Absent:

Mr. Tom Scott, Committee member

Approval of Minutes:

The minutes were presented in the committee report. With no additions, deletions, or corrections to be made, Mr. Jack Reasor made a motion to approve the minutes as presented, Rev. Rodney Hale seconded the motion, and the motion was unanimously approved.

Institutional Advancement Report:

Chair Johnson asked Vice President Joshua Cline to share the Institutional Advancement report with the committee. Mr. Cline highlighted the major points of the report. This included a review of the past semester’s activities including, but not limited to President’s Convocation and Centennial events, Homecoming, and working through staff transitions. Nicole Kaklis left the office in May to take a remote working position. Due to ongoing budget concerns the position was frozen and will remain so at this point.

Mr. Cline highlighted the good work being accomplished through branding efforts and the new “Go Further” tagline. Significant items have been completed including new banners and

branding images around campus, updated signage, new campus store merchandise, and logo and style guide creation.

Mr. Cline drew attention to the giving report within the committee report. The BC Fund was down, but understandably so during another COVID year. Also, Mr. Cline noted that many donors have restricted gifts leading to an exciting development of growth in endowed gifts. He also noted the change in structure taking place at The Virginia College Fund. Mr. Cline was hopeful that the change will reflect a positive change for the future with new direction, new leadership, and exciting opportunities ahead of the organization. Mrs. Johnson directed conversation to the giving of the Board of Trustees in the report. She implored committee members, and shared she would be sharing the same remarks at the full board meeting, that trustee giving must always be 100%.

Mr. Cline also took time to review the change to the new Blackbaud database system for the office. He thanked the IST department, Joshua Grubb, and Gabe Blakman for the significant work done to make this change. This new system will provide staff the ability to more easily work in the database without extensive training.

Finally, Mr. Cline noted the area of alumni relations and the creation of alumni boxes. These boxes will be a new layer of alumni relations work. As small groups of alumni gather in the future, they can notify the Office of Institutional Advancement. A care package, similar to the care packages sent to graduates during the beginning of the COVID-19 pandemic will be sent. Inside will be swag items for fun and a gift card to use as they get together. Office staff will continue to work on group gatherings. This spring's galas will take the place of summer alumni events.

Centennial Campaign Update:

Mrs. Johnson asked Mr. Cline to continue with a campaign update. Mr. Cline recognized the leadership of Mrs. Cathy Payne and Mr. Bob Houck as Centennial Campaign Cabinet members in the room and thanked them and the Advancement staff for their hard work in getting to this point. Mr. Cline shared the exciting news that the \$18 million public phase goal had not only been met but exceeded. He shared that celebrations had not begun yet, because we want to continue to let the general public feel they have an opportunity to be part of the campaign still through the Fall Annual Fund Appeal to hit mailboxes on November 15. Mr. Cline shared that as the returns come from the appeal into the end of the calendar year appeal, the good news will be shared. That will pivot the spring messaging into a campaign of "giving to Go Further" to be in line with the new marketing campaign. Members of the committee all collectively agreed that this being possible during the COVID-19 pandemic was wonderful.

Mr. Cline also recognized the charitable gift of Bob Houck and thanked him for his efforts. Mr. Houck shared that he felt required distributions provided a wonderful opportunity for many to give charitably without it hurting their day-to-day living. The committee agreed. Mr. Cline shared that "ways to give" would be part of the upcoming Centennial Campaign newsletter.

Mrs. Payne shared that the Town of Bluefield made a commitment of \$100,000 for a five-year period. Conversation shifted into the sentiments of town and city relations with the University. Mr. Cline shared that a new group of leaders were in place and communications were thankfully in a better place than in recent years.

Student and Faculty Comments:

Mr. Maldez shared about the work that SALT and SGA leadership groups were doing to engage students in the local community. He shared that the groups had partnered with Crea Company, Axe to Grind, The Grind Coffee Shop, and the Bluefield Area Arts Coalition to create mutually beneficial events. Dr. Jessica Sharp gave an update on the nursing program and the ongoing community work of these students. She did share that she felt we could ask faculty and staff to do more in the way of giving and encouraged the Advancement team to consider another faculty and staff appeal.

Closing Remarks:

Mr. Houck shared that he believed it was important for this campaign and the Advancement staff in its work to not forget “the widow’s mite.” Mr. Cline agreed and shared the centennial newsletter and publications would feature donors of all sizes. It was agreed by the group that the amount was important, but the giving spirit in a broad form no matter the amount was very important as well. Mrs. Julie Johnson concluded the meeting with thanks to all who participated and closed in prayer. The meeting concluded at 9:29 a.m.

Minutes submitted by Mr. Joshua D. Cline, Vice President for Institutional Advancement

Institutional Advancement Board Report

Respectfully submitted by Joshua Cline, Vice President for Institutional Advancement and Alumni Relations

Vice President's Note

Praise God from whom all blessings flow. Praise Him all creatures here below. Praise Him above ye heavenly host. Praise Father, Son, and Holy Ghost. Amen.

The words of the Doxology have remained on my heart and mind as we close out *Go Further: The Centennial Campaign for Bluefield University*. May we collectively take a moment to pause, give thanks to God for these gifts, and present it as an offering to the glory of God. We have enjoyed many achievements and victories in this campaign. First and foremost, we exceeded our goal! That is no small feat, especially after the shortfall of our 75th campaign. Many individuals came alongside the institution for this transformative moment. Second, we constructed the third floor of our Science Center, named our School of Business, and funded the needs of our undergraduate nursing program. Finally, and maybe most importantly to Advancement operations, we grew the scope of our unrestricted giving, reestablished our commitment to planned giving, and started several endowed scholarships. It is my hope our accomplishments in the latter item will be the leading priority from this point on so we may create a future with more opportunities.

The past few months have been busy. The Advancement Team was asked to partner with our colleagues in admissions and athletics for a season so that we can make a significant impact on the fall semester. Please allow me to applaud their efforts while I share with you the extra tasks they have taken on while maintaining our existing responsibilities. Rebecca Kasey and I have taken on all marketing initiatives for the institution. Jacob Key and Gabe Blakman have stepped in as interim coaches for women's and men's soccer until full-time coaches can be hired. This includes not only managing day-to-day responsibilities but recruiting in this prime moment so we may enjoy full rosters next year. Hal Keene is serving as an addition to the online admissions team. With Cathy Payne's assistance, he is focusing on meeting face-to-face with law enforcement offices, prisons, and other partners for our online and master's criminal justice offerings. They are also rebuilding our contact list for this key group. To quote our past Director of Alumni Relations and Annual Fund Giving, Mr. Mark Hipes '03, "At Bluefield, we all work in Advancement, and we all work in Admissions." We are doing our utmost to help impact our fall numbers.

In closing, please know we understand the difficulties in the decisions the Board of Trustees must undertake in these meetings. We offer to you Rev. David Armbrister's words penned in the dustjacket cover of *Lighthouse on the Hill: The Bluefield College Story* which provides hope for the Advancement Team:

"Resiliency! This is a word that aptly fits the story of Bluefield College. Financial issues have beset the school since its beginning, often giving those directly associated with its operation, as well as those simply interested in its welfare, concern about its continuance as an educational institution. If there had not been men and women of strong faith and characterized by their willingness to make great sacrifices, the college might not exist today."

Know our prayers are with you, our campus community, and Bluefield University which has been held in God's hands for 100 years now.

Sincerely,

A handwritten signature in black ink, appearing to read "J.D. Cline". The signature is written in a cursive, flowing style.

Joshua D. Cline '09
Vice President for Institutional Advancement



FY 2021-2022 Mid-Year Giving Report
As of December 31, 2021

Total Giving as of 12/31/21
\$1,554,515.30

Total Donors as of 12/31/21
525

Total Number of Gifts Made as of 12/31/21
1,210

Unrestricted Giving

Gift Category	Budgeted Goal*	Funds Raised as of 12/31/21	% of Goal Raised as of 12/31/21	FY 2020-2021 Comparison as of 12/31/20	% of Goal Raised as of 12/31/20	FY 2019-2020 Comparison as of 12/31/19	% of Goal Raised as of 12/31/19
The University Fund (formerly BC Fund)	\$300,000.00	\$170,825.88	56.9%	\$105,289.63	35.1%	\$127,795.76	42.6%
Rams Booster	\$40,000.00	\$23,410.00	58.5%	\$21,300.00	53.3%	\$16,261.67	40.1%
Virginia College Fund (VCF)**	\$125,000.00	\$0.00	0%	\$0.00	0%	\$0.00	0%
Baptist General Association of Virginia (BGAV)	\$42,000.00	\$18,615.32	44.3%	\$19,828.80	47.2%	\$18,746.89	44.6%
Subtotal	\$507,000.00	\$212,851.20	42.0%	\$146,418.43	28.9%	\$162,804.32	32.1%

* - Budgeted goals have remained constant in the past two fiscal years

** - VCF gifts are made at the end of the fiscal year

Average Unrestricted Gift as of 12/31/21
\$380.09

Restricted Giving

Gift Category	Funds Raised as of 12/31/21	Number of Gifts Made as of 12/31/21	FY 2020-2021 Comparison as of 12/31/20	Number of Gifts Made as of 12/31/20	FY 2019-2020 Comparison as of 12/31/19	Number of Gifts Made as of 12/31/19
Restricted Gifts	\$1,028,918.04	297	\$702,269.01	253	\$758,187.50	379
Endowment Gifts	\$289,243.06	151	\$120,155.18	173	\$164,296.61	127
Virginia College Fund*	\$0	0	\$0	0	\$0	0
Rise Up Rams**	\$23,503.00	205	\$33,065.00	310	n/a	n/a
Subtotal	\$1,341,664.10	653	\$855,489.19	706	\$922,484.11	506

*- VCF gifts are made at the end of the fiscal year

**- Rise Up Rams enabled team specific donations in 2020-2021

Average Restricted Gift (excluding endowment) as of 12/31/21
\$2,096.46

Average Endowment Gift as of 12/31/21
\$1,915.52



GO FURTHER

The Centennial Campaign for Bluefield University

Categories Adjusted to Advertise External Public Phase Goal of \$18,000,000

Supporting Students to Go Further	\$ 9,750,000
<i>Growth of The University Fund and new scholarships</i>	
Enhancing Facilities to Go Further	\$ 6,700,000
<i>Science Center third floor construction and South Campus development</i>	
Investing in Academics to Go Further	\$ 1,550,000
<i>Academic program support and faculty enrichment opportunities</i>	
Public Phase Goal	\$ 18,000,000

Internal Campaign Areas of Focus Tracking (as of March 28, 2022)

<u>Initiative</u>	<u>Raised</u>	<u>Goal</u>
Health and Wellness Initiative*	\$ 2,597,782.29	\$ 5,000,000
Science Center**	\$ 2,308,999.50	\$ 2,700,000
Student Activities Expansion***	\$ 1,000.00	\$ 2,550,000
Planned Giving	\$ 3,786,939.00	\$ 2,000,000
The University Fund (Unrestricted Giving)	\$ 3,103,253.14	\$ 2,750,000
Endowment Growth	\$ 2,538,167.76	\$ 5,000,000
Campaign Unrestricted	\$ 730,420.27	-
Other Restricted Gifts****	\$ 5,285,545.65	-
Totals	\$20,352,107.61	\$ 20,000,000

* Includes \$200,000 moved to unrestricted from Hugh I. Shott Foundation Challenge

** Gifts and pledges to project (excluding Tobacco Commission loan/grant) + \$1.1 million Tobacco Commission Loan + \$275,000

*** Campaign project designated complete by University leadership with completed renovations to the Jack Marcom Student Center

**** Vice President's Note: There was an error in the campaign report generated for the Fall 2021 Board of Trustees report. First, in the health and wellness initiative the \$200,000 asterisk above was accidentally counted twice into the total and the amount should have read, \$2,544,246.62. Funds in the Science Center were reviewed and correctly added to the other restricted gifts area. This review was conducted as the new Blackbaud system was brought online. The formula for the Centennial Campaign report is updated and available for review.

Development

The Advancement Team has two major appeals left for the year on our development calendar:

April 28
June 1 – June 30

Giving Day/Spring Appeal
LYBNT/SYBNT and Bump-Up Appeal

BU Giving Day letters have been mailed to our past major givers to encourage them to participate once again this year and at a higher level than last year. If the solicitation brings in all requested amounts, this solicitation will net the institution \$102,000. However, the team estimates that the solicitation could see half that amount due to one gift solicitation accounting for 49% of the total solicitation. However, we remain confident that it will continue to be a successful campaign putting us closer to our University Fund goal, which in our mid-year report shows we are over halfway there. Two unique postcards will be sent to alumni and friends through April to remind them to make a gift, which will add to the past donor solicitation on BU Giving Day.

We have opted to discontinue the use of our Give Campus software to be good stewards of the institution's budget. Instead, we will update our BU Giving Day webpage throughout the day. Thanks to the good work of Joshua Grubb in his new position, we will upload gifts into an Excel spreadsheet and then utilize our Microsoft BI software to generate needed graphics to update the "thermometers" on the website. This will require more hands-on work from our team but will save us approximately \$5,000/year on the Give Campus software as we utilized existing Microsoft licenses we already hold.

We have included all our LYBNT/SYBNT (last year but not this year/some years but not this year) donor lists in the BU Giving Day solicitation. However, we will ensure that we send another giving reminder in June to any remaining individuals that have not yet made a charitable gift to do so.

In June/July, we will focus on stewardship by distributing our *Go Further: The Centennial Campaign for Bluefield University* thank you gifts to the campaign's major donors. We were able to put together a nice candle and vase set for a minimal cost thanks to warehouse shopping. We feel that despite our financial position, it is imperative our donors to this effort feel appreciated. This will continue the goodwill they have shown the institution thus far.

Alumni Relations

Regretfully, there has not been much movement in the area of alumni relations at the institution. Our focus has been on the campaign and new partnerships mentioned earlier. Following the end of the Centennial year's activities, we plan to create alumni event boxes that alumni can request for their gatherings. These would be very similar in appearance to our graduate boxes sent to May 2020 graduates during our postponed commencement. Many alumni gather together without the University planning the event or dictating the terms. We would like to offer Bluefield University party supplies, gear, banners, and a designated hashtag for photos posted

to social media that allows us to capture and share these fun gatherings. Small group events, encouraging friend groups to assemble, and signature events with broad invitations, such as Homecoming, we remain headed towards.

Public Relations and Marketing

The work of rebranding the institution from our renaming to Bluefield University from Bluefield College is nearly complete. However, a few items, like signage that is budget restrictive, remain to be updated. This will be completed as funds become available. A review of the Athletic branding and logos were completed earlier this month with a small group consisting of:

Dr. David Olive, Mrs. Tonia Walker, Mr. Rodney Kasey, Mrs. Rebecca Kasey, and Mr. Joshua Cline. Options to move to a full-body ram in the athletic logo were reviewed among other changes. After this meeting, it was determined that the current branding for athletics with the addition of the BU monogram would remain sufficient at this time with updated color schemes. Rebecca Kasey is currently working with 5° branding to create an athletics style guide to mirror the institutional guide. This will provide a complete branding guide for the University name change. Our current work will shift into more complete guidance of the “Go Further” tagline for the campus community.

As the institution’s relationship with the Vigeo firm came to an end earlier this year, President Olive instructed the Office of Institutional Advancement through the Office of Public Relations and Marketing to take over all marketing initiatives at the University. Due to the rapid and significant changes, staff members are reviewing the institution’s current position. This includes, but is not limited to, past campaign successes and failures and other factors to form a new marketing plan for the institution that is clearly understood and communicated. A goal has been set to complete this by the time of the Board of Trustees meeting. This project has become the major focus of the Office of Institutional Advancement. An addendum to this report will likely be submitted with that plan to the Board of Trustees portal at a later date.

Centennial Events

With the BGAV annual meeting moved online last year, plans to celebrate the 100-year-old relationship between the Baptist General Association of Virginia and Bluefield University will be completed during the 2022 Annual Meeting. This gathering will be at the Hampton Roads Convention Center scheduled for November 14-16, 2022. Due to our current budget circumstances, the University leadership has reduced the number of Centennial Galas down to only the Bluefield Gala held on May 7, 2022. We hope all trustees, alumni, and friends will join us at this time to celebrate the end of the 100th year!