



UNIVERSITY ADVANCEMENT AND
WINTHROP UNIVERSITY FOUNDATION

— 2022 —

REPORT *on* PHILANTHROPY



We are pleased to present our re-imagined Annual Report of Philanthropy for 2021-22, which highlights the contributions of the entire Division of University Advancement and the Winthrop University Foundation. In reviewing the past year, there is much to celebrate, despite the lingering challenges presented by COVID-19. A few highlights from the 2021-22 academic year include:

- *The Winthrop Foundation allocated **\$5,925,104** in support of student scholarships and other university priorities this past year, distributing more than **1,350 individual awards**.*
- *Our Spring 2022 **Day of Giving** set many records, raising more than **\$125,000** from **670 donors**.*
- *The reunion classes of **1970** and **1971** celebrated their **50th reunions on campus** this year, once again enjoying Winthrop's beautiful campus, reconnecting with classmates, and relishing memories.*

We invite you to read on and

- *Learn more about the work of our alumni across the globe (p. 4),*
- *Discover how your generosity changes students' lives (p. 6),*
- *Recognize how the effective stewardship of your gifts is growing our endowment and our collective impact (p. 8),*
- *See how more donors are collectively engaging to support Winthrop's impact (p. 10), and*
- *Hear from some volunteer leaders whose time and gifts are leading the way for philanthropy at Winthrop (p. 12).*

Our success, now and forever, stems from the amazing support of our friends, alumni, and donors. Your dedication to the life and prosperity of Winthrop University inspires so many others. On behalf of our entire team, thank you for all that you have done to help ensure that, despite the challenges that sometimes come, Winthrop students will continue to inspire all of us connected to their journeys.

All the best,

Jack E. DeRochi, Ph.D.

Interim Vice President, University Advancement

MISSION/VISION/VALUES

MISSION:

The Division of University Advancement strategically engages with the global Winthrop community to build and foster philanthropic relationships in support of the university.

VISION:

To create a sustainable and diverse culture of philanthropy that distinguishes Winthrop University and provides transformative opportunities to students, alumni, and the community.

WE VALUE:

- **Accountability** to all of our stakeholders, guided by the principles of responsible stewardship.
- The **diversity** of our stakeholders, their perspectives, and the many ways to engage their philanthropic interests.
- **Preservation** of the loyalty, treasures, and traditions of all Winthrop alumni.
- **Collaboration** to achieve strategic objectives for the benefit of the entire university community.
- **Transparency** as a means and an end to uphold the trust of our colleagues and stakeholders.
- **Learning** and the continued pursuit of professional development and expertise.
- Our **integrity** and maintaining the highest ethical and professional standards in all aspects of our work.

TRACKING EAGLES ACROSS THE WORLD

More than 60,000 Winthrop alumni span the globe! Our alumni enrich the university and contribute to its mission. Whether it is providing internship opportunities for students, business contacts, career guidance, or advice on adapting to a new city or country, our alumni are ready to connect with you. Winthrop alumni connect via regional alumni chapters, affinity groups, events and social media.

TOTAL ALUMNI

65,811 in all **50** states, U.S. territories and overseas populations and countries world wide

Top 10 States

1. South Carolina
2. North Carolina
3. Georgia
4. Florida
5. Virginia
6. Texas
7. Tennessee
8. Maryland
9. California
10. New York

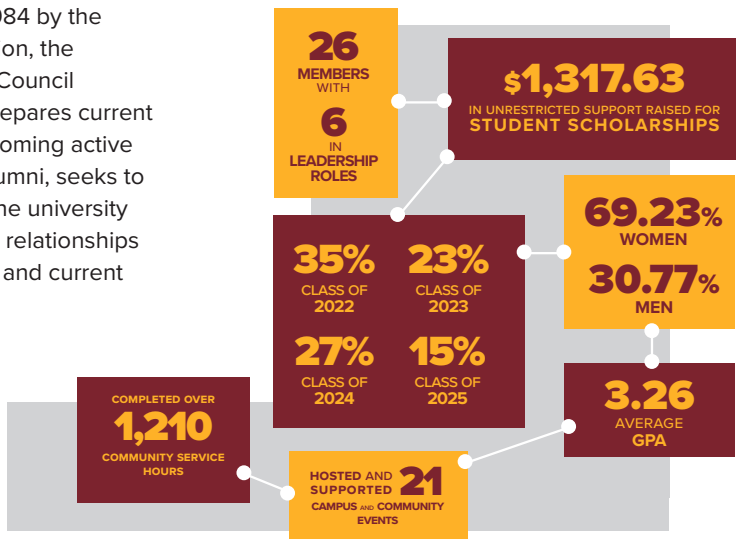
Top 10 Countries

1. United States
2. China
3. France
4. Canada
5. Spain
6. Saudi Arabia
7. Australia
8. Brazil
9. Germany
10. Thailand



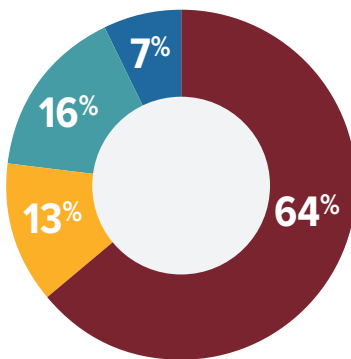
STUDENT ALUMNI COUNCIL (SAC)

Established in 1984 by the Alumni Association, the Student Alumni Council educates and prepares current students for becoming active and engaged alumni, seeks to build loyalty to the university and strengthens relationships between alumni and current students.

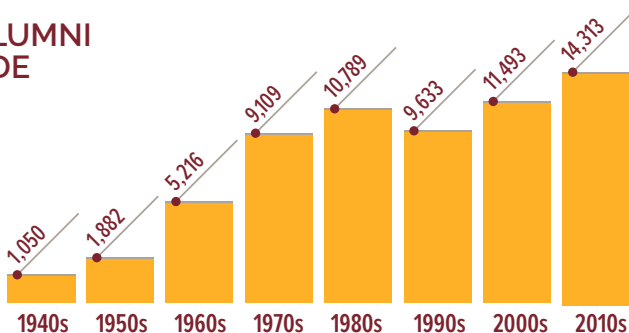


CLASSIFICATIONS

- 64%** UNDERGRADUATE DEGREE HOLDERS
- 13%** GRADUATE DEGREE HOLDERS
- 16%** NON-GRADUATE
- 7%** LOST/MISSING



LIVING ALUMNI BY DECADE



ALUMNI CHAPTERS + YOUNG ALUMNI COUNCILS

Regional Alumni Chapters and Young Alumni Councils connect fellow alumni who live within defined geographic areas and offer alumni a way to stay connected. For more information, visit www.winthrop.edu/alumni.

Alumni Chapters

- Atlanta Alumni Chapter
- Charleston Alumni Chapter
- Charlotte Alumni Chapter
- Columbia Alumni Chapter
- D.C. Metro Alumni Chapter
- Kershaw Alumni Chapter
- Myrtle Beach Alumni Chapter
- Orlando Alumni Chapter
- Rock Hill Alumni Chapter
- Triangle Alumni Chapter
- Upstate Alumni Chapter

Young Alumni Councils

- Charleston
- Charlotte, North Carolina
- Columbia
- Rock Hill
- Upstate South Carolina
- Washington, D.C.

PHILANTHROPIC IMPACT

LORENZO STEELE JR. '23

(Graduate School Scholarship)



Lorenzo Steele Jr. has always been an artist, but the Master of Arts in Arts Administration program has allowed him to speak the language. With 30 years of work experience, 20 of those years as a corrections officer, Lorenzo needed to figure out how to be a visual artist in the non-profit realm to go after his next dream: retrofitting a school bus into a mobile prison art gallery. He also hopes to create a multi-cultural prison art museum and community center. Winthrop has given him the language and skills to create a non-profit and “to use art as a tool for advocacy, exposing systemic injustices.”

CHIA YANG '22

(Lucia Beason Bell Endowed Scholarship; Mike and Jennifer Fayed Scholarship; Close Scholar)



Chia Yang is the first in her family to attend college. She credits scholarship support. “When I first started my college journey, I was not sure if I was good enough to be in college,” Chia said. “The scholarship committees believed in my potential to succeed.” Succeed she has, often working two jobs in addition to participating in activities and volunteering more than 450 hours to local community organizations since freshman year. While Chia seeks to become a Certified Financial Planner, that goal means even more. “I want to be a proponent in assisting low-income communities and young adults with their finances.”

PAUL HAZELTON '21

(Ellen Rasor Wylie Mathematics Scholarship; Theresa Pittman Jackson Memorial Scholarship)



Paul Hazelton loves to learn, but paying for that opportunity hasn't been an easy road. He notes that a college degree is his way of engaging with something he loves – programming and game design – and also ensures that he will be able to turn that love into work that will enable him to “stop living with constant financial stress.” Scholarship support has helped Paul to focus on his passion for game design, and he's working on a game that he hopes to release soon. Because of supportive faculty and the generosity of donors, Paul has turned a passion into the start of his working life.

EDEN CRAIN '22

(Vera Gruber Batten and D. Wise Batten Scholarship)



Eden Crain, a nutrition major from Simpsonville, South Carolina, does work that matters. She aspires to become a Registered Dietician “to have a lasting impact on the quality of life and health” of her patients. But her focus extends to improving life outside of her professional field. Eden is a founding member of the Winthrop Running Club and was 2021-22 President, and she has worked with the Nutrition Student Organization to start a community garden. Through her own research experiences, Eden has also seen how much her professors have invested in her, saying, “I have gained so much academically and personally through these professors’ support.”

MIGUEL CALDWELL '23

(Close Scholar)



Miguel Caldwell knows teaching is his “life’s mission,” and that Winthrop is the place to best prepare him. An aspiring elementary school teacher, he hopes to return to his home school district, saying “I saw the need for more males of color and would love to return there to meet that need.” A family health situation changed things, and he almost wasn’t able to return after his first semester. But with some sacrifices by his parents and scholarship support, he was able to continue. Miguel knows that the other factor setting him apart is “appreciating the hardships and struggles it took” to achieve his dream.

TROI' ALEXIS WILLIAMS '22

(Graduate School Scholarship)

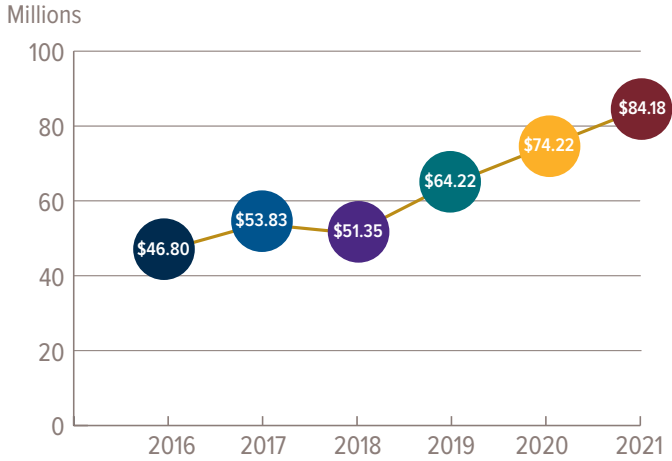


Troi' Williams says completing the first year of graduate school in a pandemic was an unexpected learning experience. A graduate student in counseling and development, Troi' chose Winthrop's program because of “the emphasis on quality preparation for practitioners and the diverse backgrounds of faculty within the program.” With this preparation, Troi' will fulfill her ultimate goal – “to not only use education to make a difference but also to encourage others to make a difference.” Her plan is to become a mental health counselor with a holistic approach, ultimately working as a mental health clinician in the NFL in addition to running her own private practice.

PHILANTHROPIC MANAGEMENT

PORTFOLIO GROWTH

- 2021
\$84,180,000
- 2020
\$74,220,000
- 2019
\$64,220,000
- 2018
\$51,350,000
- 2017
\$53,830,000
- 2016
\$46,800,000

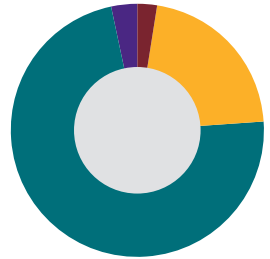


STATEMENT OF ACTIVITIES

REVENUES

- Unrestricted Gifts
\$367,934
- Restricted Gifts
\$2,922,425
- Investment Income
\$9,944,566
- Other Income
\$433,183

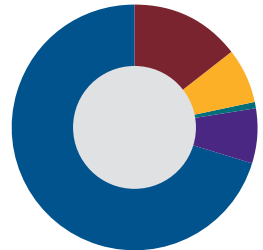
Total Revenues: **\$13,668,108**



EXPENSES

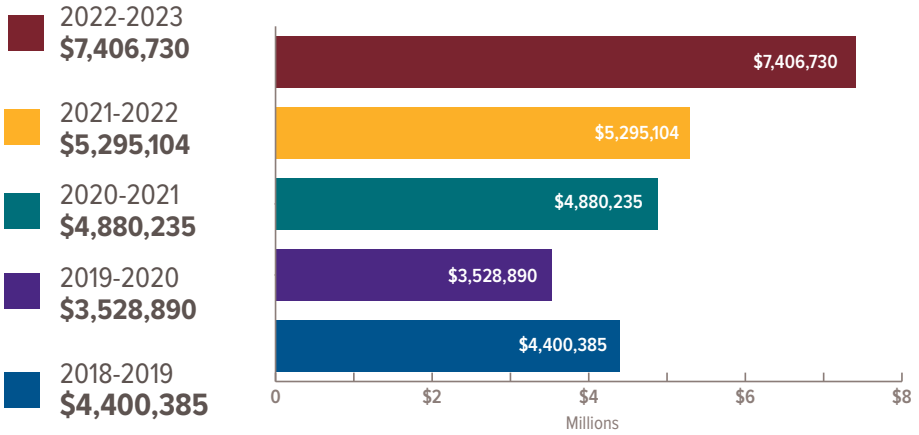
- Foundation Operations
\$545,478
- Fundraising
\$261,410
- Alumni Association
\$29,570
- Univ. President's Support
\$268,214
- Scholarships/Dept support
\$2,602,379

Total Expenses: **\$3,707,051**



..... Net Surplus(Deficit): **\$9,961,057**

UNIVERSITY SUPPORT



STATEMENT OF NET POSITION

ASSETS

Cash and Equivalents:

\$85,646,089

Pledge Receivables (net):

\$1,261,196

Other Assets:

\$2,291,044

Total Assets:

\$89,198,329

LIABILITIES + NET POSITION

LIABILITIES:

Accounts Payable **\$263,002**

Annuities Payable **\$1,523,787**

Payroll/Other Liabilities **\$37,983**

Total Liabilities: **\$1,824,772**

NET POSITION: **\$87,373,557**

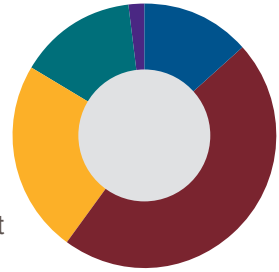
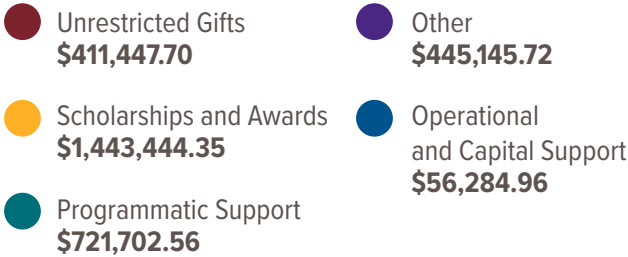


WINTHROP
UNIVERSITY

Foundation

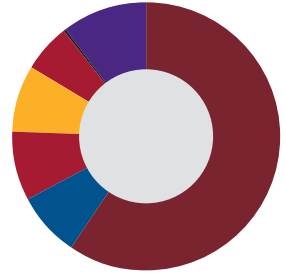
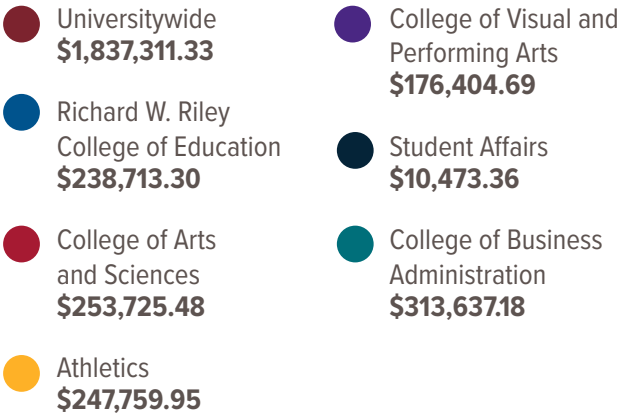
PHILANTHROPY MILESTONES

GIVING BY FUND CATEGORY 2021



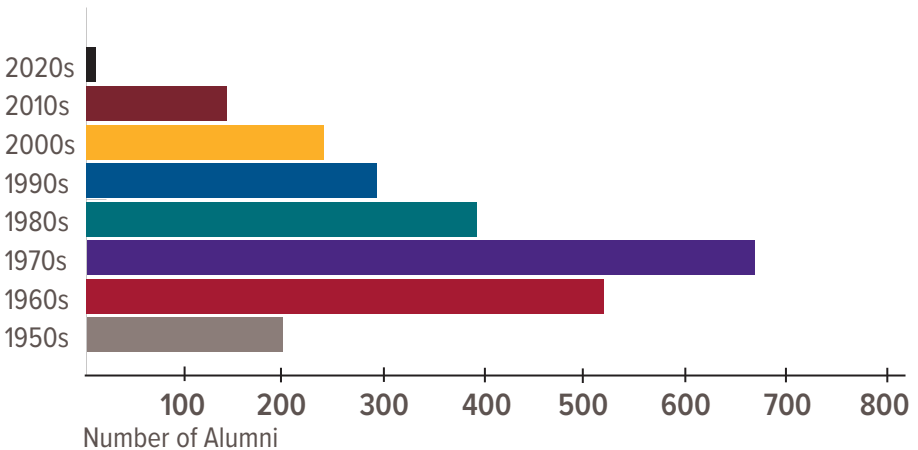
Total: **\$3,078,025.29**

GIVING BY DIVISION 2021



Total: **\$3,078,025.29**

ALUMNI GIVING BY CLASS YEARS 2021





Winthrop celebrated a record-breaking day this past spring during its annual Bleed Garnet, Give Gold Day of Giving, raising more than \$100,000 in just 24 hours.

Bleed Garnet, Give Gold is a 24-hour giving event to celebrate Winthrop, support our students and strengthen our university. While generous alumni, parents and friends give throughout the year, this is a day for every single member of our community to be part of a large collective show of support. From noon April 26 to noon April 27 more than 600 people – including alumni, employees, students, parents, and friends – rallied to support several campus projects and initiatives.

Two deans, **P.N. Saksena** and **Takita Sumter**, provided a gift-match challenge for their respective colleges during Day of Giving as a way to encourage giving and support the initiatives of their colleges. Dean Sumter notes that, “I’ve seen the transformative impact of the Winthrop experience firsthand as a faculty member and long-time research mentor. The Day of Giving is where that support starts.” Dean Saksena “provided a match because we yield the highest ROI when we support the hopes and dreams of the next generation of leaders.”



P.N. Saksena
Dean of the College of
Business Administration



Takita Sumter
Dean of the College
of Arts and Sciences

Total Giving: \$128,720 | Total Donors: 670

Top Areas

1. Winthrop Fountain Restoration
\$60,756
2. Winthrop Fund
\$26,488
3. College of Arts and Sciences
\$7,884
4. College of Business
\$6,307
5. Winthrop Athletics
\$5,355

Giving By Constituencies

1. Alumna/us
80.8%
2. Faculty/Staff
10.6%
3. Friends
5.1%
4. Organizations
1.3%
5. Former Faculty/Staff
1.1%

Giving by State

1. South Carolina
65.9%
2. North Carolina
12.6%
3. Georgia
4%
4. Virginia
3.6%
5. Florida
2.3%

(Gifts from 31 different states)

PHILANTHROPIC LEADERSHIP

PETER MORONI '07, '09

President, Winthrop University Foundation Board of Directors



Peter Moroni stays busy. As the Head of Sales at WealthTech firm Seeds Investor, he oversees all sales, service, partnerships, and customer success initiatives and staff for the company. He also has a young family. Yet he remains deeply engaged with the Winthrop community in his role leading the Foundation Board of Directors and participating in all things Winthrop. He continues to give back time and make gifts to Winthrop because, he says, Winthrop gave so much to him as a student, and says he “stays involved and gives to Winthrop to ensure future generations of Winthrop staff, faculty, alumni, and students receive the same opportunity that I and so many others had.” He also points to Winthrop’s role as a “cornerstone” of the area and local community, saying, “the reality is that I love Winthrop because the university gave me a chance. I have to return the favor!”

CASEY FERRI '09

Treasurer, Winthrop University Alumni Executive Board



Casey Munn Ferri knows the impact of alumni support through service and philanthropy. She invests her time by serving as treasurer of the Alumni Association Executive Board. She and her husband, Eric Ferri '07, have been consistent donors to various campus initiatives, including the Eagle Club and the Winthrop Fund. As an estate planning attorney, Casey knows the value of a planned gift as a way to invest in the future. When she and Eric updated their estate planning documents a few years ago, they wanted to include a gift to their alma mater. “Winthrop has given so much to us over the years, and we wanted to make sure we honored that by giving back.” They attributed Winthrop’s support and advocacy for first-generation college students as an important factor in their decision, since both were first-generation themselves. “It all began for both of us at Winthrop.”

LINDA KNOX WARNER '80

Treasurer, Winthrop University Foundation Board of Directors



Linda Knox Warner has been many things to Winthrop, having served on the board of the Winthrop University Alumni Association and currently on the Winthrop University Foundation Board of Directors. As treasurer, Linda works closely with Foundation staff to ensure thoughtful and prudent management of gifts from donors. With Linda's leadership, the Foundation's portfolio continues to grow, reflecting a shared commitment between generous donors and the

Board of Directors in managing those gifts to make a maximum impact. Since 2016, the Winthrop University portfolio has grown by gifts and investments from \$46M to more than \$84M.

BYRON D. PUTMAN '94

President, Winthrop University Alumni Executive Board



Byron Putman, a producer for the Carolina Panthers Radio Network, is proud to serve all Winthrop alumni. In his role as president of the Winthrop University Alumni Association, he knows that we all have to participate to make a difference together, saying "we have a duty as alumni to ensure Winthrop continues to be successful and remain relevant to future students, faculty, and staff." Despite the commitments of his career and family life with his wife and three children,

Byron is on the front lines, participating in university events on campus and beyond, promoting Winthrop with his time, presence, and his giving.

CAMPUS STATS



5,174
STUDENTS

71%
FEMALE

18
AVERAGE
CLASS SIZE



12:1
STUDENT TO
FACULTY RATIO

45% MINORITY
ENROLLMENT AT
UNDERGRADUATE
LEVEL

3,973
UNDERGRADUATE STUDENTS

276 FULL-TIME
FACULTY

1,201
GRADUATE STUDENTS



STUDENTS
FROM **40**
STATES
AND **32**
COUNTRIES

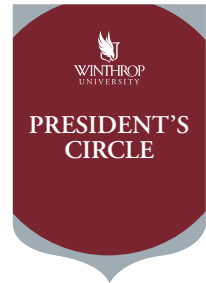
Data based on Fall 2021

RECOGNITION SOCIETIES

We recognize our donors' generosity through various recognition societies. These societies not only honor our donors but also illustrate how their support fosters excellence at Winthrop.

The President's Circle

Recognizes annual donors giving \$1,000 or more each fiscal year. Members lead the Winthrop community in promoting a culture of giving to have a profound impact on the university and its students. Members can take pride in the support provided to Winthrop and have the benefit of connecting with each other at exclusive events.



Winthrop Loyal

Celebrates donors who have given any amount for the previous three consecutive years or more. Gifts of any amount, to any area of Winthrop, count toward memberships and is based on qualifying gifts to the Winthrop University Foundation between July 1 and June 30. Winthrop Loyal Society members are a community of more than 1,200 donors, and are among our most loyal constituents helping ensure students are given every opportunity to succeed both in and out of the classroom. Whether you are new to supporting Winthrop or have been a part of the Winthrop University donor community for years, securing your membership is easy — make a gift online today!



D.B. Johnson Society

D.B. Johnson, Winthrop's founding president, had a vision. With a gift of \$1,500 from the Peabody Foundation headed by Robert Winthrop, D.B. Johnson created what is today one of South Carolina's top-performing public universities. The D.B. Johnson Society consists of a loyal group of individuals who have included Winthrop University in their estate plans. Like Robert Winthrop, members of the D.B. Johnson Society know that the plans they make today will provide perpetual support to Winthrop University and its mission.



Each gift to Winthrop makes a difference. Thank you for your support of Winthrop students past, present, and future!

When Eagles
soar together,
we can fill
the sky.

Thank you for being part of the
Winthrop University philanthropic
community. To learn more about how
to engage, or to make a gift, visit:
www.winthrop.edu/advancement, or
contact us at giving@winthrop.edu
or **803/323-2275**.



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