

**BOARD OF TRUSTEES  
INSTITUTIONAL ADVANCEMENT COMMITTEE  
REPORT SUMMARY**

**Date of Meeting:** February 4, 2022

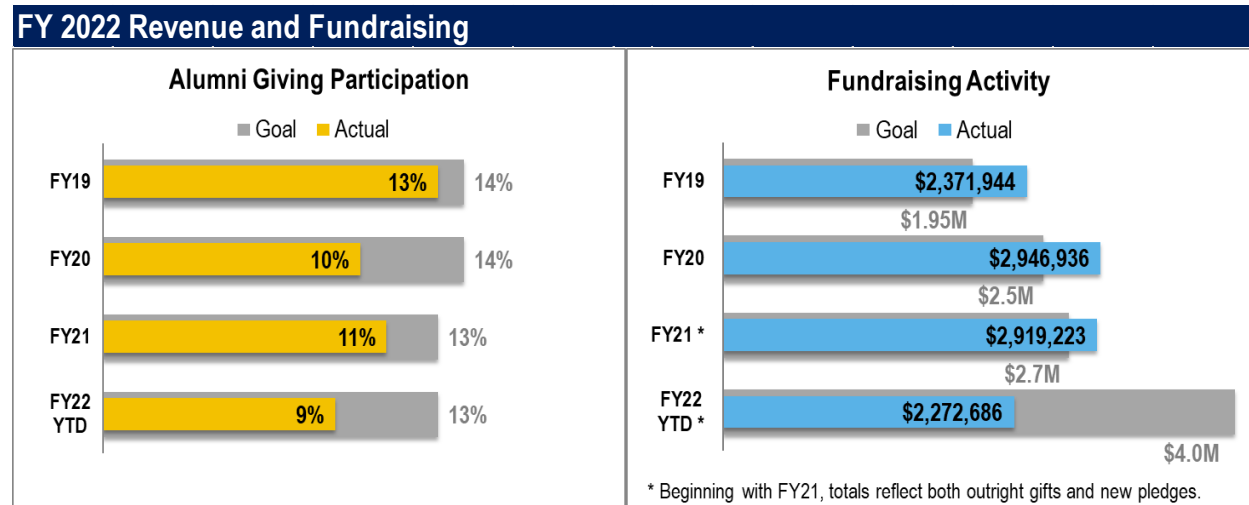
**Date of Next Meeting:** May 12, 2022

**Committee Chair:** Gail Harmon

**Committee Members:** Trustee Chair Susan Dyer, Alice Bonner '03, Paula Collins, Peg Duchesne '77, Judy Fillius '79, Elizabeth Graves '95, Bonnie M. Green '74, Glen Ives, President Tuajuanda Jordan, Douglass Mayer '04

**Staff Member:** Vice President Carolyn Curry

**Dashboard Metrics:**



**Executive Summary:**

Institutional Advancement (IA) aligns with the Institutional Advancement Committee's (IAC) charge to strengthen the College's brand and reputation, increase philanthropy, and engage alumni and the community. The two graphs above are among the metrics that track progress. Total FY22 fundraising activity to date is \$2,272,686 toward a goal of \$4 million.

The alumni giving participation rate is currently at 9.4% thanks to a boost from the annual *Giving Tuesday* online event on November 30. The FY22 goal is 13%.

The IAC meeting packet includes progress reports since October 2021 for Alumni Association activities in partnership with the IA Alumni Relations team, most notably on the influence the Alumni Association has on the number of donors giving. It has raised more than \$20,000 in FY22 to incentivize participation, and the numbers bear out that success.

Also included is the report from the November Foundation Board and the Joint Investment Advisory Committee meetings. Of note, the market value of the Foundation's endowment as of October 31, 2021 was \$40.3 million.

Rounding out the reports are Institutional Advancement's progress in promoting the brand and the College's reputation, philanthropy highlights and alumni and community engagement. A report is also made on named spaces to date as part of fundraising.

The closed portion of the IAC meeting will focus on major gift donor identification and cultivation strategies.

**INSTITUTIONAL ADVANCEMENT COMMITTEE  
MEETING OF FEBRUARY 4, 2022**

**OPEN SESSION  
AGENDA**

- I. CALL TO ORDER**
- II. DISCUSSION ITEMS**
  - A. Update from Vice President for Institutional Advancement Carolyn Curry
  - B. Named Spaces Update
  - C. Update from SMCM Alumni Association President Alice Bonner '03
  - D. Update from SMCM Foundation President Bonnie M. Green '74
- III. ACTION ITEMS**

There are no action items.
- IV. INFORMATION ITEMS**
  - A. Report from Institutional Advancement Vice President
  - B. Report from St. Mary's College of Maryland Alumni Association President
  - C. Report from St. Mary's College of Maryland Foundation President
  - D. Minutes of the October 15, 2021 Meeting
- V. Vote to close meeting in compliance with Title 10, Subtitle 3 of the General Provisions Article (the Open Meetings Act) for the purposes set forth in the closing statement.**

*A portion of this meeting will be held in closed session.*

**BOARD OF TRUSTEES**  
**INSTITUTIONAL ADVANCEMENT COMMITTEE**  
**REPORT FROM INSTITUTIONAL ADVANCEMENT**

**Institutional Advancement Committee (IAC) Charge:**

*Ensure a strong future for St. Mary's College of Maryland in an intensely competitive environment by promoting 21<sup>st</sup> century reputation and branding of the College, encouraging philanthropy, and strengthening alumni and community relationships.*

Institutional Advancement (IA) aligned with the IAC's charge throughout the reporting period October 2021–January 2022. The following are selected progress points:

**Philanthropy**

- **Raised to date:** For the FY22 giving cycle (July 1, 2021- June 30, 2022) the total raised as of January 7, 2022, is \$2,727,686 toward a goal of \$4M. Twenty-four major gifts (i.e., \$10,000+) represent 81% of the total raised. The largest donor categories have been to scholarship support, the LEAD Strategic Fund and to annual giving (i.e., the St. Mary's Fund).
- **Cultivation:** Development staff are working with Foundation Directors, Trustees, faculty and volunteers to identify major gift prospects and develop strategies for cultivation. One such cultivation strategy was implemented on December 4, 2021. Members from the cohorts noted were asked to suggest invitees, particularly people who may have never been engaged in the College or have not been engaged for some time. Of the 95 invited, 38 guests attended. The evening focused on showcasing students, including a special Boyden Gallery exhibit, a special performance by the College's unique ensemble PING directed by Professor of Music Larry Vote, and a quartet of student instrumentalists with the help of Professor of Music Jeff Silberschlag. Helping to host the attendees were President Jordan, Helen and Ray Wernecke, Gail and John Harmon, Laraine and Bill Glidden, and Don Stabile.
- **Annual Giving:** The IA team produced the annual *Giving Tuesday* online event November 30, 2021. The event is particularly important in engaging new donors and retaining past annual givers. The stretch goal of 2,000 unique donors was exceeded (2,342), which represents an increase of 13.5% over last year. Of the 2,000, the team set a goal to engage 800 alumni and did so with 826 unique alumni donors contributing, about even with last year. A total of \$282,711 was raised, exceeding the goal of \$277,000. The Board of Trustees, the Foundation Board of Directors, and the SMCM Executive Council all had a 100% participation rate.

## Branding and Reputation Building

### Enrollment Marketing

In addition to creating a print mix of marketing materials, the IA integrated marketing team works in tandem with Admission to help influence its funnel goals through a variety of platforms. A sampling of that work can be seen [here](#). For the reporting period, the IA team partnered with the College's enrollment consultants and Admission on the following:

- **Pageviews:** *Visit* page traffic increased by 81% over the same period last year (16,960 vs. 9,390). *Apply* views also increased 36.6% over the same period last year (16,424 vs. 12,026). While not always enrollment related, pageviews to the College homepage notably increased 83.45% in the reporting period over last year (211,836 vs. 115,471).
- **Open Houses:** To complement the Open House pushes, the IA team produced and circulated a :30 promotion spot as seen via this [link](#). It was posted to Facebook as well as in 10 cinemas across St. Mary's, Calvert and Charles counties generating more than 54,000 views with a call to action to register. Including action by enrollment partners, total Open House pushes generated 3.6M in outdoor impressions, 6.8M in digital impressions, more than 39,000 total clicks and 280 conversions through social media platforms, with Facebook being the strongest.
- **Social Media:** The IA team created and focused on brand and enrollment-specific content to complement Admission efforts. In the reporting period, compared to last year, Instagram followers increased by 13%, Facebook by 3%, Twitter by 5% and LinkedIn by 2%. The team recently delved into TikTok. Video shorts and snippets are by far the most popular attractors in realizing increased actions on all platforms.
- **Other:** Enrollment marketing partners continued successfully influencing portions of the funnel through search 2023 and scholarship campaigns using graphics, photography and videos created by the IA team. Among the uptick in metrics in the reporting period, a 14.45% increase was realized over last year at this time with students directly responding to requests for information about SMCM or scholarships. Other actions of note:
  - The IA team encourages Admission to share with prospects and families the materials it produces for College events and initiatives (video, ads, event promos, etc.) as appropriate.
  - The IA team overhauled websites of importance to prospective and current students including the Center for Career and Professional Development, the Office of Student Success Services, the Office of Accessibility Services, and DeSousa-Brent.
  - The team added in December its 17<sup>th</sup> internally produced One Minute Major video to its playlist—Neuroscience.
  - Refresh brochures were created for the Center for Career and Professional Development, ILC, Museum Studies, Anthropology and WGSX to enable them to have current branded and updated materials for Admission events.

### Amplifying the Brand

- **Earned Media:** Among media stories garnered were President Jordan’s keynote address at the Leonardtown Jail Museum for the Benjamin Hance marker unveiling; the President’s published article in the December *Social Innovations Journal* “Can We be Better Allies and Advocates? A Roadmap for Institutions to Challenge Systemic Racism;” a news story in *USA Today* tied to the Sacred Journey and its meaning; and a TV interview with Dr. Jordan on *Amplified with Aisha Mills* about the controversies surrounding Confederate monuments and memorials.
- **Enhanced branding efforts:** The IA team, while focusing on external visibility, made it a point to internally strengthen the brand during the fall term. Among the initiatives:
  - Retooled in December 2021 the College’s brand resources pages ([www.smcm.edu/brand-resources](http://www.smcm.edu/brand-resources)) that intends to help with search engine keywords and optimization as well as promote brand consistency among internal and external constituents. Already the pages have had a 72% increase in pageviews when compared with last year. The site features a brand rationale and usage video produced by IA, branded flyer and nametag templates, Zoom backgrounds, desktop backgrounds and phone wallpaper; these products are also linked on the College’s InsideSMCM landing page with bi-monthly tips. The IA team conducted eight brand training sessions with College units or groups.
  - Launched 17 new GIFs (animated images for the web) created by its student intern, including the debut of an animated Solomon Seahawk. The GIF assets were just launched this school term—77 in total—and have had 3.3M views, with the most popular being The Solomon Happy Birthday Animation. The winter edition of *The Mulberry Tree* magazine promoted these to augment traffic to the site.
  - Distributed branded swag and accompanying brand info to students, faculty and staff as part of the President’s State of the College address “Great Momentum.” Likewise, the team distributed branded giveaways at both *Giving Tuesday* to engage alumni influencers, and at the President’s December campus appreciation event for students, faculty and staff.
  - Created two 8’ tall branded nautical marks on exterior buildings to serve as “selfie stations” for internal and external audience to amplify the brand’s secret handshake and add color to the campus. The team also provided Athletics with a large mesh banner to enhance the stadium’s visibility and created and utilized branded points of pride signage and banners for major events.

### Leveraging Events (internally and externally)

The IA team, working with the Sacred Journey planning committee, produced and marketed this in-person November 13 event near the anniversary of the dedication of The Commemorative to Enslaved Peoples of Southern Maryland. The webpage created has had more than 4,300 views since its November launch. The team produced a post-event video recently posted to continue

traction to the site and has a feature in the winter edition of *The Mulberry Tree* magazine as well as a link to the Flickr album of photos from the journey that should increase pageviews.

Other events the IA team produced or assisted in producing with branded programs, external and internal marketing, promotional materials, etc. include:

- The November 8 Bradlee Lecture on Journalism with Yamiche Alcindor, an in-person event that had a 125% increase in participation since it was last held in 2019.
- The November 10 Presidential Lecture Series with Anna Deavere Smith, an in-person event that had a 56% increase in participants over last year's event.
- An outdoor campus appreciation event by President Jordan in December that attracted 380 students, faculty and staff.

The IA team is currently assisting with the virtual MLK Day Celebration, the Reeves Lecture on February 16, the Lucille Clifton Lecture February 28, the Twain speaker April 1, and both the Awards Convocation (April 15) and Commencement (May 14), among other events and summer conferences.

## **Alumni and Community Engagement**

In addition to collaborating with the Alumni Council (*see the Alumni Council report as part of the IAC materials*), the team produced the following in the reporting period to further promote the College's brand and reputation and to keep alumni engaged in the College's strategic initiatives:

### Giving Tuesday

Results of the successful 2021 efforts led by Alumni Relations, the Alumni Council and the rest of IA have been posted elsewhere in IAC materials. Some additional notes of importance:

- The post-event survey (202 responders) reflected that 88% prefer to give on *Giving Tuesday* than any other time and that 97% plan to donate next year based on this year's positive experience.
- Increased *Giving Tuesday* pageviews by 13% over last year; click throughs from Instagram increased by 57%.
- Increased conversions from emails by 10% and the open rate by 26% over last year.
- Created video clips on the importance of the St. Mary's Fund to strengthen its visibility.

### Marketing to Alumni

- Released a social media toolkit and an email template for the Launch-a-Leader program which provides branded resources alumni can share on their personal profiles to help recruit students to SMCM.
- Created and experimented with Instagram reels for the first time (videos up to :60) earning more than 10,000 views on the first two posted.
- Rebranding the Alumni Association webpage (five pages just completed) with the completion date slated for March. Rebranded the monthly events and Alumni news e-letters for increased navigability.

Looking ahead, the team is working on its second annual *Valumtine's* Virtual 5K February 4-7; Bay to Bay Service Days in April; Spring Break-a-Sweat on April 9; and Alumni Weekend June 9-12.



## ST. MARY'S COLLEGE OF MARYLAND ALUMNI ASSOCIATION

**Date of Meeting:** February 4, 2022

**Reporter:** Alice Bonner '03, president of SMCM Alumni Association

### **Executive Summary:**

The Alumni Association ended 2021 with a lot of momentum that it is carrying into 2022. *Giving Tuesday* was another huge hit for the College. More than \$20,000 was donated by current and former Alumni Council members to fund the Alumni Council Challenge that helps to incentivize donors to give. Many alumni signed up as influencers to raise money for a SMCM cause or fund of personal significance. The Alumni Council acknowledges the support of the entire SMCM community, including the Board of Trustees, for meeting the online event's goals, especially that of having more than 800 alumni give.

Prior to the Council's November meeting, VP and CFO Paul Pusecker and Director of Planning Maury Schlesinger gave the Alumni Council a guided tour of the new Performing Arts Center and Learning Commons. The Council expressed excitement to see the beautiful spaces. (On a personal note, touring the new buildings was a highlight for this reporter, since my younger cousin will be attending SMCM in fall 2022).

Looking forward to 2022, we are working with the Alumni Relations team to organize the 2<sup>nd</sup> Annual Valumtine's Virtual 5K between February 4-7. In our inaugural run last February, we had alumni registrants from more than half of the states in the U.S. and from all over the world including Canada, United Kingdom, Argentina, Romania, Switzerland, Sweden, and Zambia. We also raised nearly \$4,000 in donations which almost fully funded the two Alumni Legacy Scholarships offered this past year. This year we are offering an additional family-friendly race category, a bike option, and more prizes for a photo contest. While there is no fee to participate, registration is required. We encourage Trustees to join in this alumni engagement event.

We continue to plan for other future events such as Bay to Bay Service Days throughout the month of April and Alumni Weekend in June. Following the June meeting at Alumni Weekend, the Alumni Council will recognize award recipients from 2020-2022 at a ceremony at the Alumni Center at Cobb House. Thank you for your continued support of our signature events.

**BOARD OF TRUSTEES  
INSTITUTIONAL ADVANCEMENT COMMITTEE**

**OPEN SESSION MINUTES**

**Date of Meeting:** October 15, 2021

**Status of Minutes:** Approved

**Institutional Advancement Committee Members Present:** Committee Chair Gail Harmon, Board Chair Susan Lawrence Dyer, Alice Bonner '03 (via Zoom), Paula Collins, Peg Duchesne '77, Judy Fillius '79, Elizabeth Graves '95 (via Zoom), Melanie Hilley '92 (via Zoom), Glen Ives (via Zoom), President Tuajuanda Jordan, Doug Mayer '04

**Staff Member:** Vice President for Institutional Advancement Carolyn Curry

**Others Present:** Sandra Abell, Nick Abrams '99, Joshua Ajanaku '22, Betsy Barreto, John Bell '95, Anne Marie Brady, Peter Bruns, Donny Bryan '73, Kelsey Bush, Jeff Byrd, Andrew Cognard-Black (via Zoom), Katie Gantz, David Hautanen, Sven Holmes, Jerri Howland, Gretchen Phillips, Larry Leak, Jesse Price '92, Paul Pusecker, Paul Schultheis '98, Bill Seale (via Zoom), Jenny Sivak, Danielle Troyan '92, Gina Vaughn, Ray Wernecke, Anna Yates

**Executive Summary**

Institutional Advancement Committee (IAC) Chair Gail Harmon called the meeting to order at 2:04 p.m. She reported that because the Committee would be going into closed session, she and Vice President Carolyn Curry had a prior meeting with faculty representative Andrew Cognard-Black and staff representative Gretchen Phillips to give them an overview of the IAC charge and progress to date.

Chair Harmon reminded those gathered of the Committee's charge: to ensure a strong future for St. Mary's College in an intensely competitive environment by promoting a 21st century reputation and branding of the College, encouraging philanthropy, and strengthening alumni and community relationships.

Chair Harmon encouraged the Committee to review the full Institutional Advancement report and metrics in the meeting packet provided by VP Curry to become familiar with the significant progress and achievements since the last IAC meeting in May 2021.

SMCM Foundation Vice President Paul Schultheis '98 filled in for President Bonnie M. Green '74, who was unable to attend due to a prior speaking engagement. He reported that the Foundation elected its officers at its annual meeting on September 29: Bonnie M. Green '74, president; Paul Schultheis '98, vice president; Chris Holt '86, treasurer; and Susan Paul, secretary. Three new appointments were made to the Board of Directors: Brittany Toscano Gore '08, Bluford Putnam and Dan Schiffman '91. The Board paid tribute to Director Don McDougall '83 who, due to term limits, concluded six years of service and was acknowledged for his exemplary service and philanthropy.

CliftonLarsonAllen, the audit firm selected last spring through the Foundation's bid process, presented its FY21 annual audit findings. It issued an unmodified "clean" opinion, which is considered a validation of the Foundation's fiduciary responsibility to ethically and responsibly oversee its privately held funds.

J.P. Morgan, the Foundation's investment manager, reported to the Foundation's Joint Investment Advisory Committee (JIAC) that the market value of the Foundation's endowment portfolio as of August 31, 2021 was \$40.1M with a 19% one-year return.

Foundation VP Schultheis concluded by noting the Foundation Board continues its efforts to build a donor pipeline by identifying prospects.

Alumni Association President Alice Bonner '03 gave an overview of Alumni Council activities and engagement efforts since the last Committee meeting, reporting that the Alumni Council gathered for its annual retreat and summer meeting August 21-22, 2021. She referred to highlights in her written report, which include setting 2021-22 goals as follows: better engaging former Council members; recruiting Affinity Network chairs and launching three networks; updating the Regional Chapter Handbook; supporting Job-IQ and the Launch-a-Leader Admission referral programs; recruiting two student members for the Alumni Council; and partnering with Institutional Advancement on the November 30 Giving Tuesday event.

VP Curry summarized the FY21 final giving cycle results (July 1, 2020—June 30, 2021), reporting that a total of \$2,919,223 was raised in the midst of the pandemic, exceeding the goal of \$2.7M. She also reported that \$470,368 had been raised to date as of September 20, 2021 toward the FY22 goal of \$4M. VP Curry acknowledged Trustee Elizabeth Graves '95, who shared insights on branding with IA staff during their summer retreat. At the conclusion of VP Curry's remarks, Board Chair Susan Lawrence Dyer pointed out that the quality of the College's social media has been outstanding.

At 2:20 p.m., Chair Harmon asked for a motion to close the meeting in compliance with Title 10, Subtitle 3 of the General Provisions Article (the Open Meetings Act) for the purposes set forth on the closing statement: To review and discuss items permitted to be discussed in closed session by Md. Gen. Prov. Code Ann. '3-305(b), as they require preserving the confidentiality of private citizens' finances as well the confidentiality of commercial information. Matters to be discussed: donors and prospects to the LEAD fundraising effort and the strategies for reaching multi-year goals and gifts. The motion was seconded.

### **Action Items**

There were no action items.

## **ST. MARY'S COLLEGE OF MARYLAND FOUNDATION INC. REPORT**

**Date of Meeting:** February 4, 2022

**Reporter:** Bonnie M. Green '74, president of St. Mary's College of Maryland Foundation Inc.

### **Executive Summary:**

The Foundation Board and its Joint Investment Advisory Committee (JIAC) held meetings on November 19, 2021. The members of JIAC for 2021-22 were announced as Foundation Directors Nicole West (chair) and Michael O'Brien '68; Trustees Nick Abrams and Sven Holmes; and President Tuajuanda Jordan.

JIAC Chair West reported to the Foundation that the JIAC, after thorough deliberation, recommended a 4.50% endowment spend release rate for FY23 and a 2.0% support and service fee. The Foundation also thoroughly discussed and approved the recommendation. Ms. West also noted that the Foundation's investment manager J.P. Morgan had reported on the endowment investment portfolio performance as of October 31, 2021, with a market value of \$40.3M (net of fees), a fiscal year-to-date gain of 3.8% (against a comparative index of 3.0%) and a one-year gain of 22% (against a comparative index of 8.3%). JIAC continues to focus on investment opportunities and J.P. Morgan has been asked to present investment opportunities to the JIAC, with a particular focus on the real estate sector, to achieve income yield with long-term capital growth. J.P. Morgan recommended an additional commitment of funds to an existing direct real estate fund asset; the JIAC voted to recommend, and the Foundation approved. J.P. Morgan also shared an overview of macro trends with the JIAC.

Executive Director Carolyn Curry provided a fundraising update; \$1.9M had been raised in current funds and booked pledges since July 1, 2021, toward a goal of \$4M by June 30, 2022. A series of metrics were presented to show key areas of fundraising support to date, including LEAD and scholarships. Engaging and retaining donors through *Giving Tuesday* the annual online giving event, is of critical importance. The results of the November 30, 2021 event, included elsewhere in the IAC materials, exceeded goals and saw 100% participation among the Foundation Board of Directors and the Board of Trustees.

President Jordan updated the Foundation on LEAD-related initiatives, including the status of new majors launched or under development.

The Foundation also clarified its Gift Acceptance Policy by noting that \$10,000 is the minimum required to establish a named current fund, and \$25,000 is the minimum required to establish a named endowed fund. The Foundation Board of Directors is actively engaged in identifying major gift prospects and in donor cultivation.