



BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE
REPORT SUMMARY

Date of Meeting: May 13, 2022

Date of Next Meeting: TBD

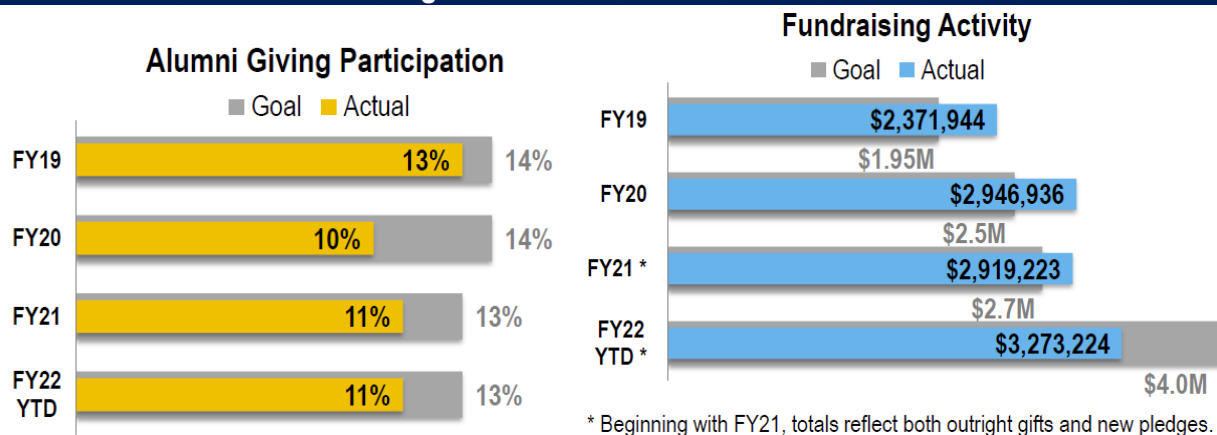
Committee Chair: Gail Harmon

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:

FY 2022 Revenue and Fundraising



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 as of April 21, 2022 is \$3,273,224 toward a goal of \$4 million.

The alumni giving participation rate as of April 21 is 11% which matches the final goal reached in FY21. With Alumni Weekend coming in June, the FY22 goal of 13% is attainable.

The IAC meeting packet includes progress reports since January 2022 for Alumni Association activities in partnership with the IA Alumni Relations team, most notably on targeted initiatives that have increased alumni engagement over last year at this time.



Also included is the report from the April Foundation Board and its Joint Investment Advisory Committee meetings. Of note, the market value of the Foundation's endowment as of March 31, 2022 was \$38 million, up \$2.5 million from the same time last year.

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.

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



**INSTITUTIONAL ADVANCEMENT COMMITTEE
MEETING OF MAY 13, 2022**

**OPEN SESSION
AGENDA**

- I. CALL TO ORDER**
- II. DISCUSSION ITEMS**
 - A. Update from SMCM Alumni Association President Alice Bonner '03
 - B. Update from SMCM Foundation President Bonnie M. Green '74
- III. ACTION ITEMS**

There are no action items.
- IV. INFORMATION ITEMS**
 - A. Report from St. Mary's College of Maryland Alumni Association President
 - B. Report from St. Mary's College of Maryland Foundation President
 - C. Report from Institutional Advancement Vice President
 - D. Minutes of the February 4, 2022 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.



ST. MARY'S COLLEGE OF MARYLAND ALUMNI

ASSOCIATION Date of Meeting: May 13, 2022

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

After two years of remote engagement, alumni are excited to gather again in person.

The first alumni event of 2022 was the successful second annual *Valumtine's* Virtual 5K in February with 141 participants from 17 states, Washington, DC and four international countries. Participants posted photos from the 5K as part of a contest whereby five winners received SMCM hats and St. Mary's College Campus Store gift cards (see the photos [Second Annual Valumtine Photos 2022](#)). The 5K also raised \$4,556 in donations for the Alumni Legacy Scholarship, which will cover award commitments for this year's two recipients. The Scholarship Committee is currently reviewing candidates and will announce the winners by July 1.

The first on-campus alumni event since the 2019 Hawktoberfest took place on April 9, when 95 alumni (130 total, including family/friends) returned for Spring Break-a-Sweat. The event, a reunion for the fall sports alumni athletes, consisted of five reunion games – men's and women's soccer, volleyball, field hockey, and women's basketball. Notably, it was the first opportunity for many to play in the Jamie L. Roberts Stadium. After the reunion games, a tailgate gathering was held to watch both lacrosse teams defeat their opponents.

Throughout the month of April, Earth Day was celebrated with the Sixth Annual Bay to Bay Service Days. This year featured 10 projects with non-profits, the **regional chapters** and current students: St. Mary's River Watershed Association, Kate Chandler Campus Community Farm, the Live Water Foundation in **Annapolis**, Anacostia Watershed Society in **Washington, DC**, Leveling the Playing Field in **Silver Spring** and **Baltimore**, Color on the Creek in **Frederick**, the **Philadelphia** Zoo, and St. Luke's Episcopal Church Food Pantry in **Boston**.

During Alumni Weekend on Friday, June 10, the Recognition and Awards Committee will present the Association's annual awards. Trustees are welcome to attend the ceremony at 4:00 p.m. in the Cole Cinema where the following will be honored for 2022:

- Society of Distinguished Alumni Awards: Barbara Mantler, Litsa Williams, Les Potter
- Outstanding Young Alumni Award: Haley Rizhallah
- Honorary Alumni Award: Peter Burns

We will also recognize the 2020 and 2021 award winners at this time.



The Association has five new members joining the Alumni Council this fall:

- Aman Afash '16
- Matt Baden '11
- Kenneth Benjes '11
- Valerie Gregorio '19
- Michael Mellinger '18

Additionally, the Association welcomes three new officers:

- Treasurer John Ahearn '76
- VP of Operations Sean Floyd '06
- VP of Chapter Activities Erin O'Connell '91



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

Date of Meeting: May 13, 2022

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

Executive Summary:

The Foundation Board of Directors and its Joint Investment Advisory Committee (JIAC) held meetings on April 29, 2022.

The Foundation's investment manager J.P. Morgan reported that the endowment investment portfolio performance as of March 31, 2022 had a market value of \$37.9M (net of fees), a gain of \$2.3M in market value from the same time last year. The JIAC spent time discussing market trends and risks as they relate to the endowment and how J.P. Morgan is continuing to evolve the portfolio. In line with broadening investment opportunities, on March 14, 2022 the JIAC voted to recommend a \$1M private credit investment, which the Foundation accepted and approved.

Executive Director Carolyn Curry provided a fundraising update in the Foundation Board meeting: \$3.3M has 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 showing key areas of fundraising support to date, including LEAD and scholarships. Naming opportunities, a stadium locker campaign for the Seahawk Fund, and a Performing Arts Center auditorium seat campaign for the Performing Arts Fund were also revealed. Thirty-eight major gift donors have contributed funds to help reach the \$4M goal.

President Jordan provided an update to the Foundation on College initiatives and activities, including enrollment progress, new majors, state funding, and projects being funded by recent donations.

The Foundation Board of Directors approved its FY23 operating budget. It also reviewed several areas to help cultivate prospects and introduce them to the value of a St. Mary's College of Maryland education. Directors continue to be actively engaged in identifying major gift prospects and in donor cultivation.



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

**REPORT FROM INSTITUTIONAL ADVANCEMENT
MAY 13, 2022**

Institutional Advancement Committee (IAC) Charge:

Ensure a strong future for St. Mary's College of Maryland in an intensely competitive environment by promoting 21st 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 January 2022–May 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 April 21, 2022, is \$3,273,224 toward a goal of \$4M. Thirty-eight major gifts (\$10,000+) represent 89% of the total raised. The largest donor categories have been to the LEAD Strategic Fund and to scholarships.
- **Cultivation:** Development staff are actively working with volunteers, Foundation Directors, Trustees, faculty and staff to identify major gift prospects and develop strategies for cultivation. In partnership with President Jordan this semester, development officers traveled to San Diego, Boston and New York City to meet with prospects. A new major gift officer, Sarah Dudley, was hired to fill a vacancy; she is cultivating, soliciting and stewarding major gifts along with being the team's point person for planned giving.
- **Annual Giving:** As of April 21, 2022, \$465,991 has been raised in annual funds with a goal of \$500,000. Among the initiatives and marketing just launched: donations tied to June's Alumni Weekend registration, a stadium locker naming drive and an auditorium seat naming drive. Funds from the locker tributes will go toward the athletic Seahawk Fund and funds from the auditorium seat tributes will go toward the Performing Arts Fund.

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 platforms. For the

reporting period, the IA marketing team partnered with the College's enrollment consultants and the Admission team on the following:

- **Pageviews:** *Visit* page traffic increased by 13% over the same January-May reporting period last year (26,421 vs. 26,037). *Apply* views increased 5% over the same period last year (10,051 vs. 9,576).
- **Open Houses:** To complement the April Open House pushes from the marketing partners, the IA marketing team created a landing page for print and digital ads it had produced that had 1,845 pageviews. The team also created and launched two e-blasts to key geographic territories – each averaged a 27% view rate, more than double the industry average rate of 12%. Both also averaged a 3.5% click rate, above the standard rate of 1-2%.
- **Social Media:** The IA team created and focused on brand and enrollment-specific content to complement Admission efforts. In the January-May reporting period, compared to last year, Instagram followers increased by 13%, Facebook by 3%, Twitter by 3% and LinkedIn by 1%. The team recently delved into TikTok with posts from student interns generating about 2,700 views. Stress reduction tips for exams topped TikTok views. The College's Giphy channel garnered another 500,000 views in this reporting period, bringing that platform's total views since its November 2021 launch to 3.7 million. Overall, video continues to be the most popular attractor in realizing increased actions on all platforms.
- **Other:** Enrollment marketing partners continued influencing portions of the funnel through search 2023 and scholarship campaigns using graphics, photography and videos created by the IA team. As an example, the team created three short video ads for one partner, with the videos outperforming static digital image ads running by 63%. Other actions of note:
 - The IA team won its 20th marketing award in in the past two years for the Admission Inquiry Response print piece it created in house. It won silver in the national Educational Advertising Awards competition.
 - The IA team created and launched web pages for the new Business Administration and Performing Arts degree programs.
 - IA encourages Admission to leverage with prospects and families the materials it produces for College events and initiatives (video, ads, event promos, etc.) as appropriate.
 - Among its website revamps across campus units, the IA team is improving the Office of Student Financial Assistance's site.
 - The team added in April its 18th internally-produced One Minute Major video to its playlist—Marine Science. These videos are created by IA in conjunction with its student interns.
 - The team recently conducted an extensive photography shoot to enhance and refresh the imagery for the Admission FY23 viewbook and companion pieces it is currently creating.



Amplifying the Brand

- **Earned Media:** Multiple media outlets ran the story about the Mackall Plantation named as a new site on the Underground Railroad Network to Freedom with outlets such as the Smithsonian Magazine and WTOP using photos of the College's Commemorative to Enslaved Peoples of Southern Maryland. Among other stories getting media attention for the College: Julie King's work with the Rappahannock Tribe was featured in the Washington Post; Skylar Kaplan was featured in the Baltimore Sun as one of nine women playing collegiate baseball; the Department of Chemistry research with a local distillery was featured in Forbes; and local outlets ran mentions of the Board's tuition and fee freeze, the new hires in the Center for Career and Professional Development, the new Vice President for Equity and Strategic Initiatives Dereck Rovaris, and the Commencement speaker. New VP Dereck Rovaris was also featured in Diverse Issues in Higher Education.
- **E-newsletters:** Refreshed the design and content of the monthly InsideSMCM Parents and Families, Arts Alliance, and Alumni e-newsletters based on customer feedback.
- **Enhanced branding efforts:** The IA team, while focusing on external visibility, continued to internally strengthen the brand during the second semester. Among the initiatives:
 - Updating the Route 5 road banners for Historic St. Mary's City and Trinity Episcopal Church as part of the College's pole banner displays.
 - Creating more downloadables on the brand resource web page (www.smcm.edu/brand-resources), with more than 300 visitors accessing new PowerPoint slides, flier templates and logos this semester. Two hundred seventy in the reporting period have viewed the brand tutorial video IA created. New branded desktop and phone screensavers are currently being shared with alumni, families and Arts Alliance members via IA's monthly e-newsletters.
 - Creating more brand imagery on campus such as stand-up banners and stair risers for the Office of Student Success Services, customized video/slide College promos that run in Zoom waiting rooms for Zoom-related events; and inside entry way signage that details what units are within buildings, particularly for academic ones.

Leveraging Events (internally and externally)

The IA team produces or assists in producing and leveraging branded College events. Among this semester's work:

- Supported President Jordan's spring thank you to the campus community by creating and promoting the Spring Snack Shack on April 11 with more than 400 students, faculty and staff stopping by for special treats.

- Marketed the virtual MLK Prayer Breakfast, the virtual Lucille Clifton event, Awards Convocation, and the Mark Twain Lecture with Reese Waters.
- Currently promoting Commencement 2022 to internal and external audience via webpages, social media and e-promos and will oversee online streaming. Also marketing the Mulberry Music Festival: Jazz and the five summer River Concerts locally and statewide. IA will also oversee hospitalities run by its development team at all six concerts, an Arts Alliance reception tied to one of the River Concerts, and assist with the Governor's Cup event at the end of July.
- Ready for 11 external conferences this summer whereby the IA unit oversees logistical needs, marketing as appropriate, onsite check-in and registration, among other duties. The conferences booked total approximately 700 adults and students.

Alumni and Community Engagement

In addition to collaborating with the Alumni Council and alumni chapters (*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:

Engagement

- The Valumtine's Virtual 5k was up 17.5% registrants over last year (141 vs. 120), Spring Break-a-Sweat engaged 21.5% more this year over last (130 vs. 107), and Bay to Bay Service Days increased by 66% (83 vs. 50).
- The upcoming June 9-12 Alumni Weekend had 768 participants within the first five days of registration going live on April 22.
- The Launch-a-Leader Alumni Referral Program, designed to assist Admission with recruiting, has yielded 47 alumni (an increase of 20.5% over last year) referring 52 students (an increase of 13% over last year).

Marketing to Alumni

- Working with student interns, IA's student advancement club, the IA integrated marketing team, and alumni, created newly branded templates for all Alumni Relations events, QR codes, and social media graphics. Conducted an extensive marketing and branding assessment of all Alumni Relations and alumni chapter communiques that also provided examples and solutions for IA to use campus-wide.



- Launched a “Get Involved” e-newsletter that outlines initiatives alumni can choose to support, such as mentoring, student referrals, scholarships, service projects, award nominations, notes for The Mulberry Tree, and the like.
- Increased alumni social media engagement in the spring semester over the fall semester as these metrics show: 2% increase in total social media audience (7,291 vs. 7,161)), 60% net audience growth (99 vs. 62), and 39% engagement rate increase with content (13,693 vs. 9,822). Facebook is currently experiencing the most growth of all platforms.

Looking ahead, IA will be engaged this summer in planning for October’s Hawktoberfest and events around the dedication of the new Performing Arts Center and Learning Commons.



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

OPEN SESSION MINUTES

Date of Meeting: February 4, 2022

Status of Minutes: Approved

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

Institutional Advancement Committee Member Absent: Judith Fillius '79

Staff Member: Vice President for Institutional Advancement Carolyn Curry

Others Present: Sandra Abell (via Zoom), Nick Abrams '99, Joshua Ajanaku '22, Carlos Alcazar (via Zoom), Betsy Barreto, John Bell '95, Peter Bruns, Donny Bryan '73, Kelsey Bush, Jeff Byrd, Bonnie M. Green '74, David Hautanen, Melanie Hilley '92 (via Zoom), Sven Holmes, Jerri Howland, Gretchen Phillips (via Zoom), Larry Leak (via Zoom), Paul Pusecker, Paul Schultheis '98, Bill Seale (via Zoom), Jenny Sivak, Danielle Troyan '92, Ray Wernecke, John Wobensmith (via Zoom), Jackie Wright (via Zoom), Anna Yates

Executive Summary

Institutional Advancement Committee (IAC) Chair Gail Harmon called the meeting to order at 2:50 p.m. She announced that St. Mary's College of Maryland is on a positive trajectory with regard to the committee's charge of promoting the reputation and branding of the College, encouraging philanthropy, and strengthening alumni and community engagement.

Chair Harmon thanked the College's Trustees and Foundation Directors, who once again had a 100% participation in Giving Tuesday. She encouraged the Committee to review the full Institutional Advancement report and metrics in the meeting packet provided by Vice President Carolyn Curry to become familiar with the significant progress and achievements since the last IAC meeting in October 2021.

VP Curry briefly highlighted fundraising efforts since July 1, 2021. As of January 25, 2022, \$2.8M has been raised toward the FY22 goal of \$4M. The Giving Tuesday event on November 30 was a contributing factor, with a record 800+ alumni donors and \$277K raised.

VP Curry listed a number of enhanced branding and recruitment marketing efforts that have been underway including a brand resources website, earned media, and a record 19 top-tier national awards bestowed on the unit's work spanning the past two pandemic years thus far.

VP Curry also presented a status update on secured named facility spaces, including those at the Performing Arts Center and the Learning Commons currently under construction. Chair Harmon



encouraged Committee members and other Trustees to consider naming opportunities to perhaps honor loved ones or their family names.

Alumni Association President Alice Bonner '03 provided highlights of Alumni Council activities since the last Committee meeting, which included a very successful Giving Tuesday event. Alumni Council members donated \$20K to incentivize participation and giving through an influencer model.

Foundation President Bonnie M. Green '74 expressed great pleasure in seeing Committee and Board members in person after quite a long while. She encouraged the Committee to review her complete Foundation report included in the meeting materials. She thanked the Committee for their gifts on Giving Tuesday that contributed to 100% participation across both boards and for their ongoing donor connections. The focus of Foundation fundraising continues to be the LEAD initiative, creating internships, and enlisting Directors to help with donor cultivation. The Foundation endowment is currently valued at more than \$42M.

At 2:10 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 LEAD fundraising; strategies to reach goals, and specific donor cultivations.

Action Items

There were no action items.