



**BOARD OF TRUSTEES  
INSTITUTIONAL ADVANCEMENT COMMITTEE**

**REPORT SUMMARY**

**Date of Meeting:** February 5, 2021

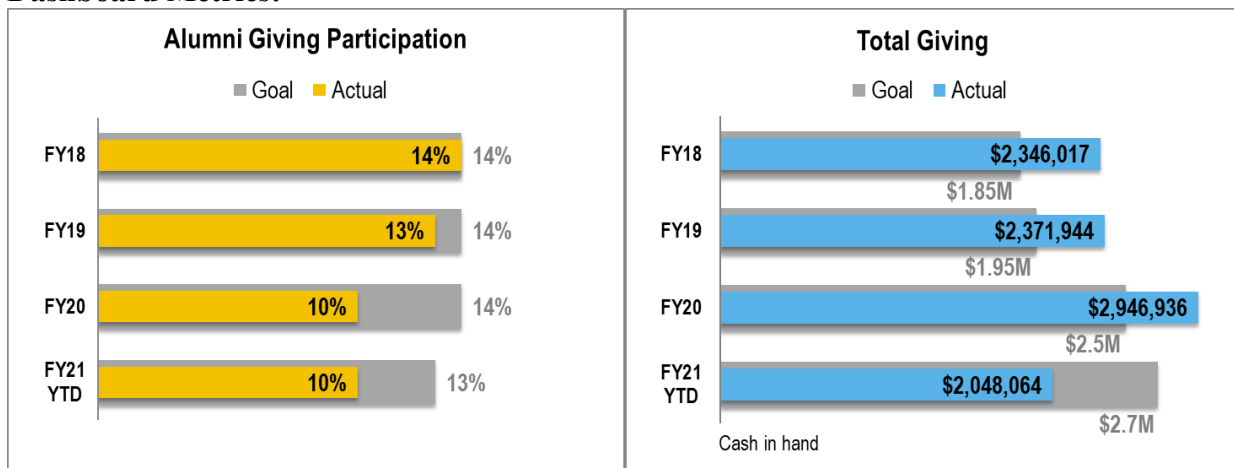
**Date of Next Meeting:** May 7, 2021

**Committee Chair:** Gail Harmon

**Committee Members:** Trustee Chair Lex Birney, Alice Bonner '03, Paula Collins, Peg Duchesne '77, Judy Fillius '79, Elizabeth Graves '95, Bonnie 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 several metrics tracking progress. Total giving since October (\$346,864) has jumped to \$2,048,064 toward the FY21 goal of \$2.7M. Because of Giving Tuesday, our annual online fundraiser in December, the alumni giving participation rate rose from 1% in October to 10% to date toward a 13% FY21 goal.

The IAC's meeting packet includes IA's FY21 progress-to-date metrics and actions. It also has a report from the SMCM Foundation President Bonnie Green and a report for the reporting period from Alice Bonner, Alumni Association president.

This IAC meeting continues the discussion on organizational LEAD campaign planning including donor strategies and priorities.



**INSTITUTIONAL ADVANCEMENT COMMITTEE  
MEETING OF FEBRUARY 5, 2021**

**OPEN SESSION  
AGENDA**

**I. CALL TO ORDER**

**II. DISCUSSION ITEMS**

- A.** Report from SMC Foundation President Bonnie Green
- B.** Report from Alumni Association President Alice Bonner

**III. ACTION ITEMS**

There are no action items.

**IV. INFORMATION ITEMS**

- A.** Report of Institutional Advancement
- B.** Report of St. Mary's College of Maryland Foundation President
- C.** Report of St. Mary's College of Maryland Alumni Association President
- D.** Minutes (October 16, 2020 and December 10, 2020 special meeting)

*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 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 2020—February 2021. The following are selected progress points:

**Philanthropy**

Metrics. For the FY21 giving cycle (July 1, 2020 – June 30, 2021), a total of \$2,049,064 has been raised as of January 18, 2021 toward a goal of \$2.7M. Donations have included a \$500,000 merit scholarship fund.

Giving Tuesday. The College's annual online fundraiser once again broke records. It raised \$287,937 (goal \$150,000) from 2,066 unique donors (1,201 goal). A primary goal was to have more alumni give; 905 did (goal 600), a 37% increase compared to last year. The alumni retention rate for alumni who consistently give is now 56%, which already exceeds the FY21 goal of 55%.

The Recovery Fund. The fund assists current students with needs arising from the impact of the pandemic. To date, 127 student grants (\$110,000) have been awarded from the \$164,000 raised. The Student Government Association donated \$50,000 to the fund in the first semester, followed by a gift of \$25,000 on Giving Tuesday in December.

Details on donors and their gifts, the Recovery Fund and Giving Tuesday can be found on [www.smcm.edu/giving/](http://www.smcm.edu/giving/).

**Branding and Reputation Building**

Pandemic Communications. The integrated marketing team created a Spring 2021 site (13 pages) that mirrored the COVID-19 information and *Reopening: The St. Mary's Way* sites created for the first semester. In addition, it updated elements of the SMCM COVID-19 tracker, including a means to show trend data. The SMCM COVID tracker has had more than 9,000 views to date.



Of note, the team recently won the Silver Award in the Category COVID Response Communications from the Council for the Advancement and Support of Education (CASE) District II. The judges cited the impressive array of quality materials that were well branded, organized and thought out. Covered in the award were COVID and Reopening webpages, St. Mary's Way videos, social media, a virtual visit, video testimonials, and campus signage.

*The Commemorative to the Enslaved Peoples of Southern Maryland Dedication.* Working with the Commemorative Dedication Planning Committee and grant funding, Institutional Advancement produced a virtual dedication ceremony on November 21. In addition to a multi-faceted dedication "event" video, the team produced an accompanying Honoring the Enslaved website. One of its features is the reading of all 12 erasure poems by poet Quenton Baker and a means to "see" where the words rest on the actual Commemorative. More than 3,200 have viewed the dedication video and the website has had more than 3,700 views ([www.smcm.edu/honoring-enslaved/](http://www.smcm.edu/honoring-enslaved/)). Regional and national media stories are housed on the site including those from The Washington Post, PBS News Hour, NPR, the Baltimore Sun, The Guardian, Essence and Diverse: Issues in Higher Education, among others. Efforts are underway to ensure the Commemorative is featured on local, state and regional tourism sites.

*Enrollment Marketing.* To assist Admission in achieving its enrollment goals, integrated marketing staff created a suite of nine targeted messaging pieces in the reporting period, in addition to wrapping a mini-van in the College's brand. To complement other efforts, it ran a 30-second commercial spot on television and in digital avenues in key recruitment zones from October – December. New visitors to the Admission website increased by 26% compared to the same time last year. Also, traffic to key recruitment pages increased when compared to the same period last year. For example, views to the First Year Apply Now site increased 41%, Apply Now +77%, Visit Campus +113% and Scholarships +139%.

Social media platforms also saw upticks when comparing January 2020 to January 2021: Facebook +13%, Twitter +7% and Instagram +25%, among others.

*Messaging.* The integrated marketing team continued to push out accomplishments of The National Public Honors College through its multi-channel internal and external communiques, including *The Mulberry Tree* magazine. The winter edition (late January 2021), with a circulation of 17,500, focuses on careers and the theme of determination culled from a St. Mary's College experience.

### **Alumni and Community Engagement**

*Giving Tuesday.* IA, in partnership with The Alumni Council, developed a unique influencer model to help attract donors and increase alumni giving. (*See the Alumni Council report in the IAC packet for details*). Notably, 100% of the Alumni Council members donated to the Alumni Challenge, raising \$20,000 to incentivize giving by encouraging donors to "influence" others. Of



note, the alumni participation giving rate before Giving Tuesday (December 1) was 1%. After Giving Tuesday, the rate jumped to 10%, on its way to achieving 13%, the goal for FY21.

*Alumni Council Partner Programs.* Alumni Relations and the Alumni Council communicate through multiple platforms to encourage alumni to refer prospective students to Admission. To date, the Launch-a-Leader program has referred 46 students. The inaugural virtual VALUMTINE'S DAY 5K event aims to keep alumni engaged and gives them a means to support the Alumni Legacy Scholarship.

*Community Outreach.* Because in-person campus events are curtailed due to the pandemic, IA is marketing virtual events to a broad array of constituents including the campus community, prospective parents and students, current parents, donors, alumni, community members, regional groups, and others. The Commemorative to the Enslaved Peoples of Southern Maryland, noted earlier, is an example. IA widely marketed the Laughing to the Polls Twain Lecture in the fall whereby 1,100 registered as far away as Australia. The marketing of the January MLK Prayer Service had 285 registrants, up about 50% over last year. Of note, IA has recently strengthened its outreach to the College's Arts Alliance by consistently marketing College virtual events to about 280 citizens.

Coming up will be marketing for A Night to Honor the Legacy of Lucille Clifton (March 1), A Presidential Lecture Series with Jay Williams (March 11), several programs by The Center for the Study of Democracy, and the second semester Twain Lecture with Janelle James (April 10)—all virtual events.



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

**Date of Meeting:** February 5, 2021

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

### **Executive Summary:**

At the November 18, 2020 meeting, Foundation Board President Bonnie Green welcomed the newest member, Scott Raspa '86. Mr. Raspa is a retired technology business executive with 30 years of experience in the highly competitive IT sector.

President Green reminded the Foundation Board to continue to recommend directors for consideration, especially in light of planning a campaign.

Joint Investment and Advisory Committee (JIAC) Chair Mike O'Brien reported that the Foundation's overall portfolio market value as of October 31, 2020 stood at \$33.9M compared to the market value of \$29.4 in March 2020. J.P. Morgan, the Foundation's investment manager, gave the JIAC an overview of how the asset allocations were performing and also some trend data.

The Board had a lengthy discussion on priorities, goals and strategies related to an upcoming LEAD comprehensive campaign now in its planning stages. To that end, it also reviewed and approved two policies: one on gift acceptance and another on campaign counting. President Green said that a fundraising workshop with the Foundation and Board of Trustees members is being planned for the spring semester on strategies and ways to contribute to the success of the campaign.

Foundation Treasurer Chris Holt recommended that the Foundation approve the JIAC's recommendation of an FY22 spend rate of 5.5%. The Foundation approved the rate.

President Green urged the Board to participate in Giving Tuesday on December 1 and also the virtual Commemorative to the Enslaved Peoples of Southern Maryland Dedication on November 21.



**BOARD OF TRUSTEES  
INSTITUTIONAL ADVANCEMENT COMMITTEE**

**OPEN SESSION MINUTES**

**Date of Meeting:** October 16, 2020

**Status of Minutes:** Approved

**Institutional Advancement Committee Members Present:** Committee Chair Gail Harmon, Board Chair Lex Birney, Alice Bonner '03, Paula Collins, Peg Duchesne '77, Judy Fillius '79, Elizabeth Graves '95, Bonnie Green '74, Glen Ives, President Tuajuanda Jordan, Douglass Mayer '04

**Staff Member:** Carolyn Curry

**Others Present:** Nick Abrams '99, Betsy Barreto, John Bell '95, Allison Boyle, Peter Bruns, Donald Bryan '73, Kelsey Bush, Mike Dougherty, Susan Dyer, David Hautanen, Sven Holmes, Shana Meyer, Paul Pusecker, Jenny Sivak, Danielle Troyan '92, Harry Weitzel, Ray Wernecke, Mike Wick, Anna Yates, Derek Young, Sandra Abell

**Executive Summary**

Institutional Advancement Committee (IAC) Chair Gail Harmon called the meeting to order at 9:35 a.m.

Chair Harmon noted the purpose of the meeting was to continue the discussion from last semester to include key takeaways from a campaign feasibility study. She noted the IAC is now joined by Bonnie Green '74, the new SMCM Foundation president, and Alice Bonner '03, the new Alumni Association president and Trustee.

Chair Harmon referenced the Institutional Advancement report and metrics in the Committee packet provided by Vice President Carolyn Curry which revealed the FY20 year-end Total Giving (cash in hand) of \$2.95M (as compared to FY20 goal of \$2.5M). The FY21 year-to-date Total Giving as of 10/15/20 was \$347K toward a goal of \$2.7M.

Chair Harmon encouraged IAC members to read the Foundation report submitted by immediate past Foundation President Jack Saum, the Alumni Association report submitted by Ms. Bonner, and the full Institutional Advancement report submitted by Vice President Curry.

At 9:40 a.m., Chair Harmon called 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: potential donors to the College and strategy behind a future comprehensive fundraising campaign. The motion was seconded.



**Action Items**

There were no action items.





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

**Date of Meeting:** February 5, 2021

**Reporter:** Alice Bonner, Alumni Association President

### **Executive Summary:**

Although 2020 came to a tumultuous end, I could not be prouder of the efforts of the Alumni Office and the Alumni Council to keep our alumni engaged throughout this challenging year. These efforts clearly paid off by the response we saw on Giving Tuesday as we set institutional records of dollars donated by our alumni and number of alumni donors. During the 32-hour campaign, I am pleased to report that 905 alumni made donations, greatly surpassing the Giving Tuesday record of 660 in 2019.

In addition to all the creativity by the Institutional Advancement team through the new website, giving form, live social media segments, and donor challenge videos, the new Alumni Council Challenge Influencer model proved to play a pivotal role in our success.

For the second year in a row, 100% of the Alumni Council members collectively donated nearly \$20,000 to award to SMC academic departments, varsity teams, student clubs and other members of the College community who inspired others to donate. The Influencer prizes, ranging from \$100 to \$5,000, were matched by the Alumni Council to support the College's three institutional fundraising priorities: the St. Mary's Fund, the General Scholarship Fund, and the Recovery Fund. The biggest change to this year's Alumni Council Challenge was that we opened it up to allow any member of the College community to be an Influencer, not just to teams and clubs, and three of our Council members worked their networks throughout the campaign, each finishing as a top 10 Influencer. Congratulations to Coach Alun Oliver '04 who took home the top Influencer prize to support the men's soccer program.

If you have not had the opportunity, I encourage you to visit the Giving Tuesday website where you can see the full Influencer rankings, hilarious challenge videos, and more. Thank you to all the donors and congratulations to Dave Sushinsky, Carolyn Curry and the entire Giving Tuesday Planning Committee.

The Alumni Office and Alumni Council have been working hard over Winter 2020 on the following:

1. Plan the inaugural VALUMTINE'S DAY VIRTUAL 5K coming up on Valentine's weekend to keep alumni engaged during a traditionally quiet time, and to raise support for the Alumni Legacy Scholarship.
2. Push the Launch-a-Leader Admission referral program which currently has 46 students referred by 39 alumni.



3. Draft the handbook, bylaw revisions, and chairperson position description to prepare for the launch of the Affinity Network program this spring.
4. Identify and institute better ways to keep former Alumni Council members involved in our efforts.
5. Prepare for our quarterly council meeting featuring President Jordan as our guest speaker.



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