A UNIVERSITY for the BOLD
Twelfth Annual
Joint Board Meeting

Introductory Remarks
John E. Littell P ’22

University Advancement Update
Matthew T. Lambert ’99

Strategic Plan Overview & Framework
Katherine A. Rowe

Strategic Plan Priorities
Peggy Agouris; Derek Aday; Steve Hanson; Kathleen Powell

Other Business & Adjournment
John E. Littell P ’22

Alumni Association Board of Directors
Annual Giving Board of Directors
Board of Visitors
W&M Foundation Board of Trustees

Happy Charter Day!
UniversityMarketing

*Expanding W&M's Reach*

- Enrollment – Preparing for the 2026 Cliff
- Advancement – Building a Bolder Campaign
- Institutional Reputation – Raising Brand Awareness
Alumni Engagement Strategy

• **Responding to pandemic fatigue:**
  
  o FY21 - 17% Increase in Events, 67% Increase in Registrations, 41% Increase in Racial & Ethnic Diversity
  
  o FY22 - 40% Decrease in Events and 80% Decrease in Registrations

• **Adapting to a digital world** by generating engaging, interactive content

• **Convening strategic visioning** sessions to reimagine the engagement landscape
William & Mary: A Lifelong Career Partner

Redefining the W&M Value Proposition

- Aligned Career Engagement & Professional Development with University Advancement
- Elevating talent pathways through experiential learning, engagement and credentialing
- Increasing access to the W&M network through investment in technology
- Enhancing alumni engagement support in key markets through Regional Industry Networks
- Expanding alumni career and professional programs
Professionals Week
Feb 28-Mar 4
• Rethinking Your Relationship with Work
• Building Workplace Community

Traditions Weekend
April 22-24
• Celebrate three 50th Reunion Classes
• Robert Boyle Legacy Society
• Olde Guarde

Black Alumni Reunion
May 6-8
• Being Black at W&M panel moderated by President Rowe
• Donning of the Kente Ceremony
• Dedication of the Hearth

W&M Women’s Weekend
September 16-18
• Theme: The Next 100
• Keynote: Author Isabel Wilkerson
• Seeking Mary Talk applicants
Participation
Evolution of Annual Giving

- **Pre-2010**
- **Specific focus**

**Fund for W&M**

- Specific impact funds created across campus

**Impact Funds**

- **For the Bold Campaign**

- 40% Participation

**Unrestricted Giving**

- Core focus moving into the next campaign
April 12, 2022

$16.4M Dollars Raised over 9 Years
Philanthropy
New Gifts and Commitments

Period Between Campaigns

For the Bold Campaign

Post-Campaign

FY07  FY08  FY09  FY10  FY11  FY12  FY13  FY14  FY15  FY16  FY17  FY18  FY19  FY20  FY21  FY22

$60.2M  $38.7M  $44.9M  $37.1M  $80.1M  $104.3M  $104.2M  $105.8M  $143.1M  $134.8M  $87.9M  $91.6M  $149.9M  $61.4M  $35.2M

* = YTD
FY22 Fundraising Goals & Progress as of 2/9/22
Re-establishing a culture of engagement & philanthropy

<table>
<thead>
<tr>
<th>FY22 Goals</th>
<th>FY22 Progress YTD</th>
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<tbody>
<tr>
<td>$65M overall</td>
<td>$35.2M</td>
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<tr>
<td>$27.6M Scholarships</td>
<td>$13M</td>
</tr>
<tr>
<td>$5M Fund for William &amp; Mary</td>
<td>$1,931,016</td>
</tr>
<tr>
<td><strong>3,300</strong> Donor Visits (virtual and in person)</td>
<td><strong>1,062</strong> Donor Visits (virtual and in person)</td>
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Transforming the Campus Landscape
Transforming the Campus Landscape
William & Mary Campaigns

<table>
<thead>
<tr>
<th>Campaign</th>
<th>Goal</th>
<th>Amount Raised</th>
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<tbody>
<tr>
<td>Campaign for the College</td>
<td>$19M</td>
<td>$150M</td>
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<tr>
<td>1976-1979</td>
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<td>$153M</td>
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<tr>
<td>Campaign for the 4th Century</td>
<td>$500M</td>
<td>$518M</td>
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<td>1986-1993</td>
<td></td>
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<tr>
<td>Campaign for William &amp; Mary</td>
<td>$1B</td>
<td>$1.04B</td>
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<td>2000-2007</td>
<td></td>
<td></td>
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<tr>
<td>For the Bold</td>
<td>$600M( original goal)</td>
<td>$1.04B</td>
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<td>2012-2020</td>
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Path Forward Toward Next Campaign

**STEP 1**
Evaluate *For the Bold*

**STEP 2**
Strategic Planning Leads to Campaign Priorities

**STEP 3**
Investment in University-wide Advancement Capacity

**STEP 4**
Feasibility Study

**STEP 5**
Silent Phase
Priorities of All W&M Coaches

1. Sports Performance Center
   • Benefits all teams, addresses the primary bottlenecks to player development → winning
   • Aids recruitment

2. Locker Room Renovations
   • Improves the student-athletes’ experience, advances equity
   • Aids recruitment

3. Arena Improvements (video scoreboards, lighting, etc.)
   • Improves the fan experience by creating more impactful moments (starting lineups, etc.)

4. Office Space Improvements

5. Arena Renovations (seating bowl, entrance, etc.)
Campaign timeline: July 1, 2020 – June 30, 2023

All In launch: March 24, 2021
Campaign Goal: $55,000,000
Total Raised: $31,868,625 as of 2/2/22
Remaining to Raise: $23,131,375
HELP REIMAGINE THE HOME FOR
W&M ATHLETICS
Growth in Consolidated W&M Endowment

1978: $14.1M
1985: $39.2M
2005: $437.7M
2011: $624.7M
2021: $1.3B
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