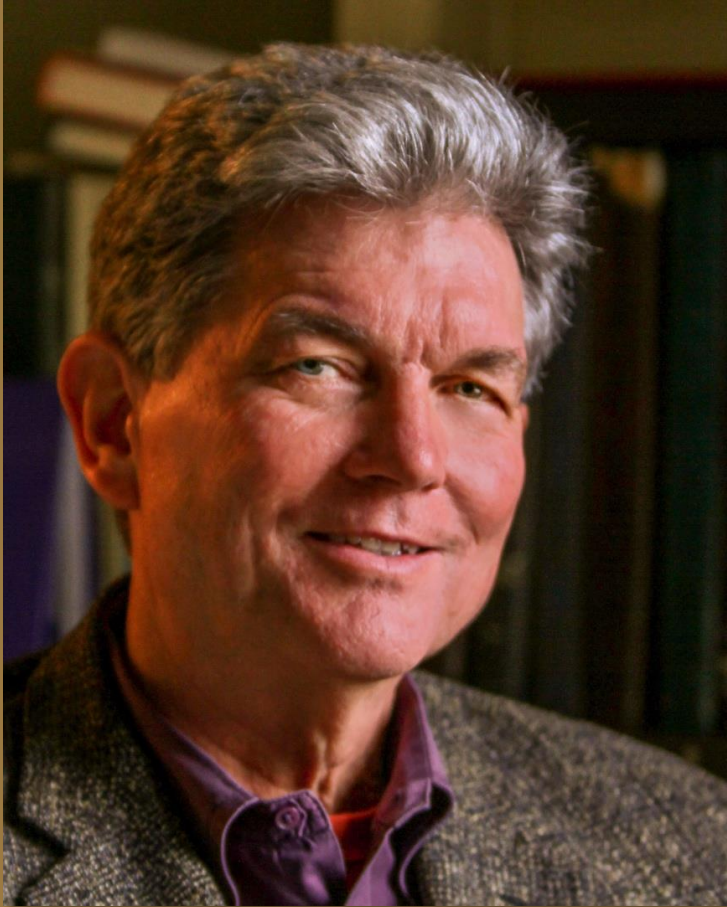




# For the Bold

---

THE CAMPAIGN FOR WILLIAM & MARY



## Remembering Christopher B. Powers '73, P '15

# *Seventh Annual* Joint Board Meeting

---

## Advancement and Campaign Update

*Matthew T. Lambert '99*

## Planned Giving

*Kirsten Kellogg '91 and Howard Busbee '65, J.D. '67, M.L.T. '68, P '90, '04*

## Break

## Plans for the 50<sup>th</sup> and 100<sup>th</sup> Commemorations

*Jacquelyn McLendon and Val Cushman*

## Q&A with the President and Rector

*Taylor Reveley and Todd Stottlemeyer '85, P '16*





# Who's Here?

William & Mary Alumni Association Board of Directors

Annual Giving Board of Directors

College of William & Mary Foundation Board of Trustees

Board of Visitors



# WILLIAM & MARY ALUMNI ASSOCIATION

*The mission of the Alumni Association is to provide services and avenues for alumni and friends of the College of William & Mary to develop loyalty to, understanding of, and lifelong participation in the present and future of the College.*

# ANNUAL GIVING BOARD

*The Annual Giving Board is organized to assist and promote the College of William & Mary through the cultivation, solicitation and stewardship of donors, with special emphasis on annual gifts. The board plays an active role in developing volunteer networks, reaching out to donors and advising in the development of strategy and operational plans to drive success of annual giving.*

# COLLEGE OF WILLIAM & MARY FOUNDATION

*The College of William & Mary Foundation (the “Foundation”), chartered in 1939, has the responsibility of seeking private support and investing and managing these non-public funds to enhance the mission of William & Mary.*

*To realize institutional aims, Foundation trustees seek gifts and endowments for scholarships, fellowships, professorships and other important purposes from the College’s alumni, friends, corporations and foundations; prudently invest such gifts; and allocate the return in accordance with any restriction placed upon a gift by a donor and the College’s most-pressing needs.*

# BOARD OF VISITORS

*The Board of Visitors is the governing authority of the College of William & Mary, including the Virginia Institute of Marine Science and Richard Bland College. In executing its duties, the board is guided by the laws and policies of the Commonwealth of Virginia. It strives to preserve the ideals and traditions of the institutions under its jurisdiction, including the student-administered Honor System.*



# Campaign Goals



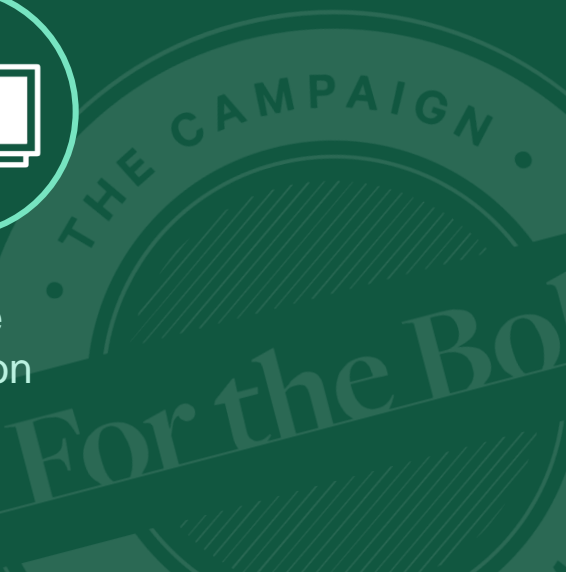
Strengthen alumni  
engagement



Achieve 40 percent  
alumni participation



Raise  
\$1 billion





---

Strengthen alumni  
engagement



# Charter Day Honorees

## ALUMNI MEDALLION RECIPIENTS:

Ted R. Dintersmith '74

Troy D. Keen '96

Frederick B. Malvin '55, M.S.T. '58

Jeffrey B. Trammell '73

## HONORARY DEGREE RECIPIENTS:

Michael L. “Pinball” Clemons '89

Mildred B. “Millie” West HON '91



# Alumni Admission Network\*

**GOAL:** To engage alumni and parents in W&M recruitment efforts through enhanced outreach to prospective students and families.

- 85 top high schools and prep schools have been selected in target geographic areas.
- 99 potential volunteers have been identified through connections to these schools – identification and recruitment efforts are ongoing.
- Alumni represented W&M at 20 college fairs this fall and 48 fairs have been identified for the spring.
- Volunteer training scheduled throughout February and March; PFC training scheduled for April 8.



# WILLIAM & MARY WEEKEND

== MAY 18-21·2017 ==

NEW YORK, NY

Joe Plumeri '66, D.P.S. '11, Honorary Chair

Mark '84 and Janice Linaugh, W&M Weekend Chairs





# W&M Weekend in NYC

## HOST HOTEL

New York Athletic Club

## BOARD MEETINGS

CWMF (May 17-19)

William & Mary Alumni Association (May 18-19)

Annual Giving (May 19)



# Weekend Highlights

## THURSDAY, MAY 18

Kickoff Reception with Joe Plumeri '66, D.P.S. '11, followed by Raft Debate *New York Athletic Club*

## FRIDAY, MAY 19

William & Mary Alumni Association Gala & Auction *The Metropolitan Club of New York*

After Hours Jazz Revue *Feinstein's/54 Below*

## SATURDAY, MAY 20

Innovation Discussion with Beth Comstock '82 and Ellen Stofan '83, D.S.C. '16 *TBD*

William & Mary Comedy Variety Show with Carmen Lynch '94 *Gotham Comedy Club*

## SUNDAY, MAY 21

9/11 Private Tour, Breakfast and Discussion with David Kelley '81 *9/11 Memorial Museum*

Alumni Admissions Luncheon *New York Athletic Club*

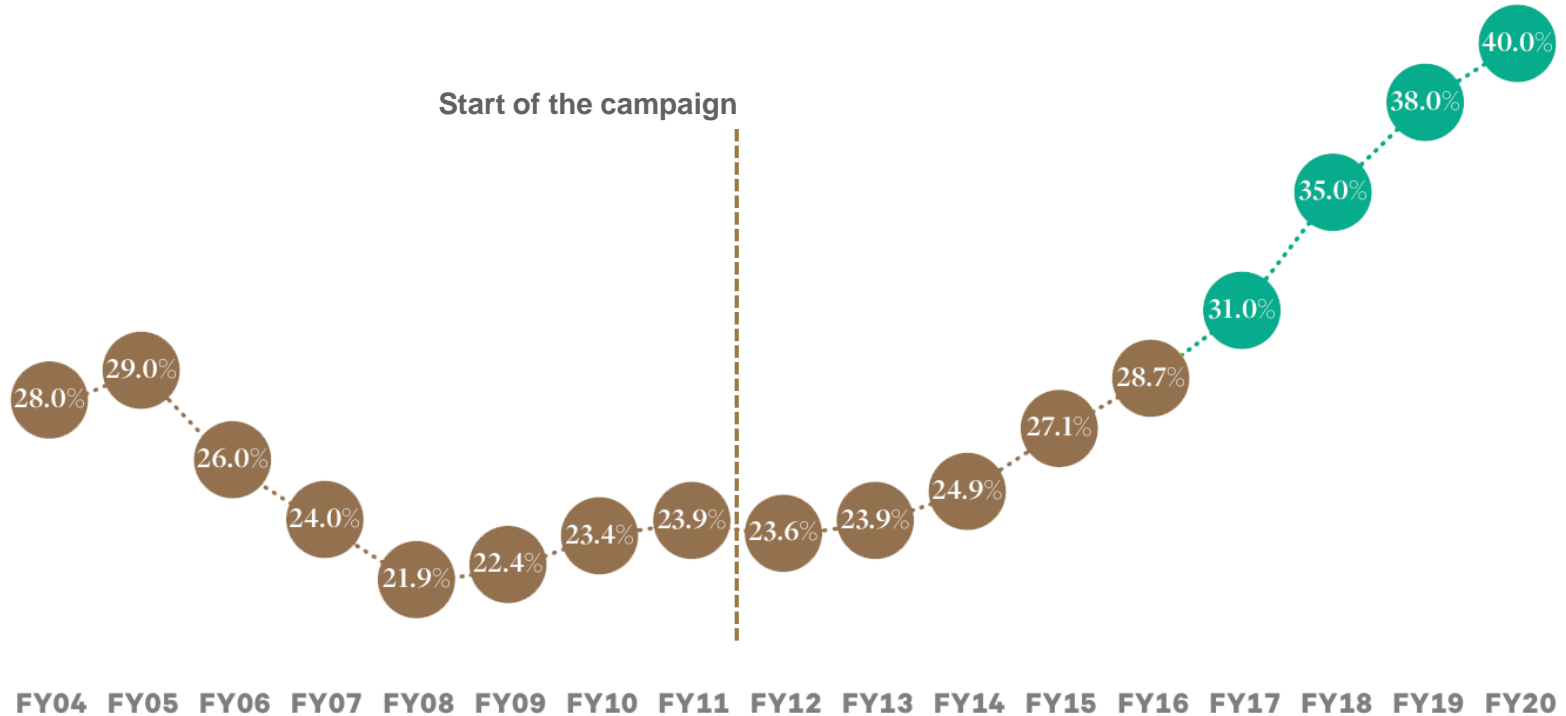
Sunset Boulevard Performance, Starring Glenn Close '74 *Palace Theatre*

40%

Achieve 40%  
alumni participation

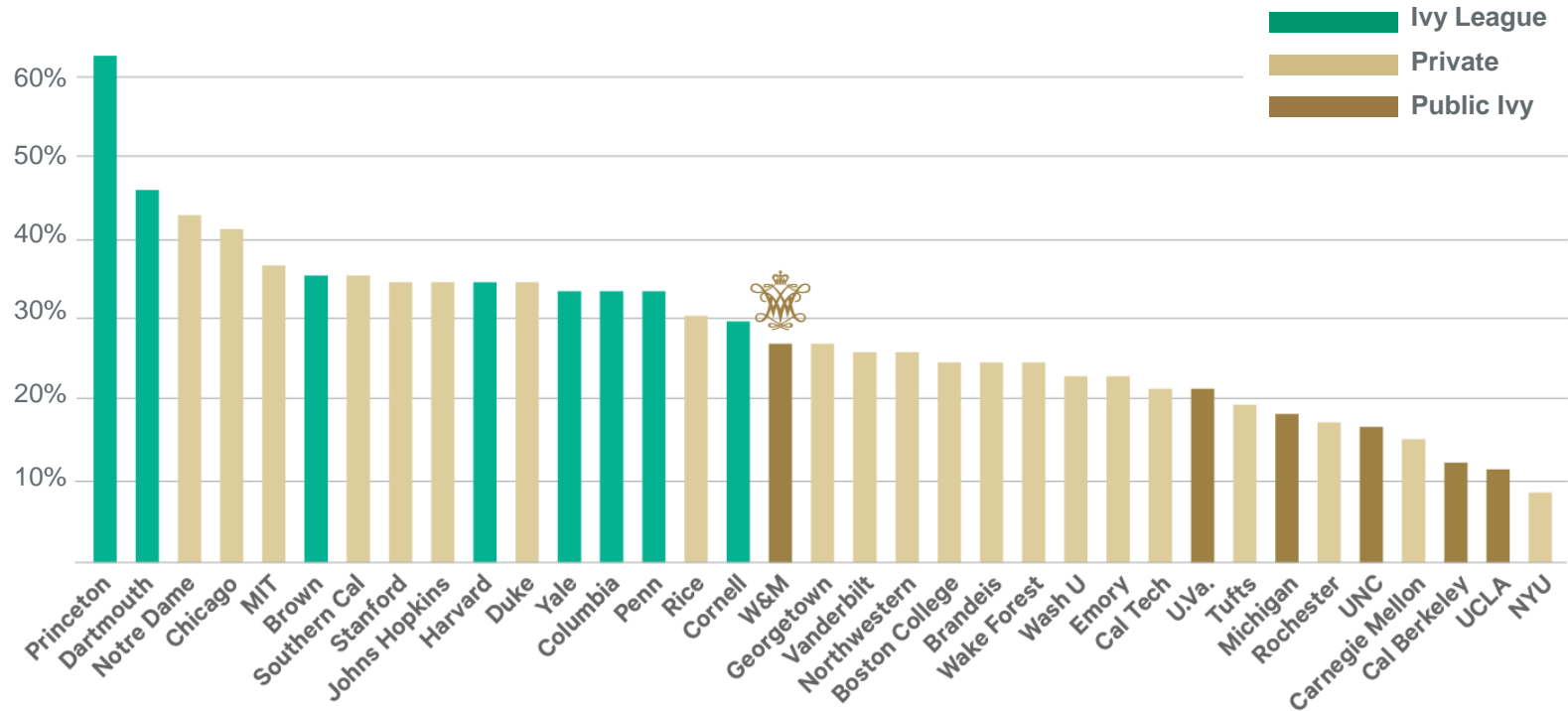


# Alumni Participation



# 2017 U.S. News and World Report

## TOP 35 UNIVERSITIES BY ALUMNI GIVING RATE





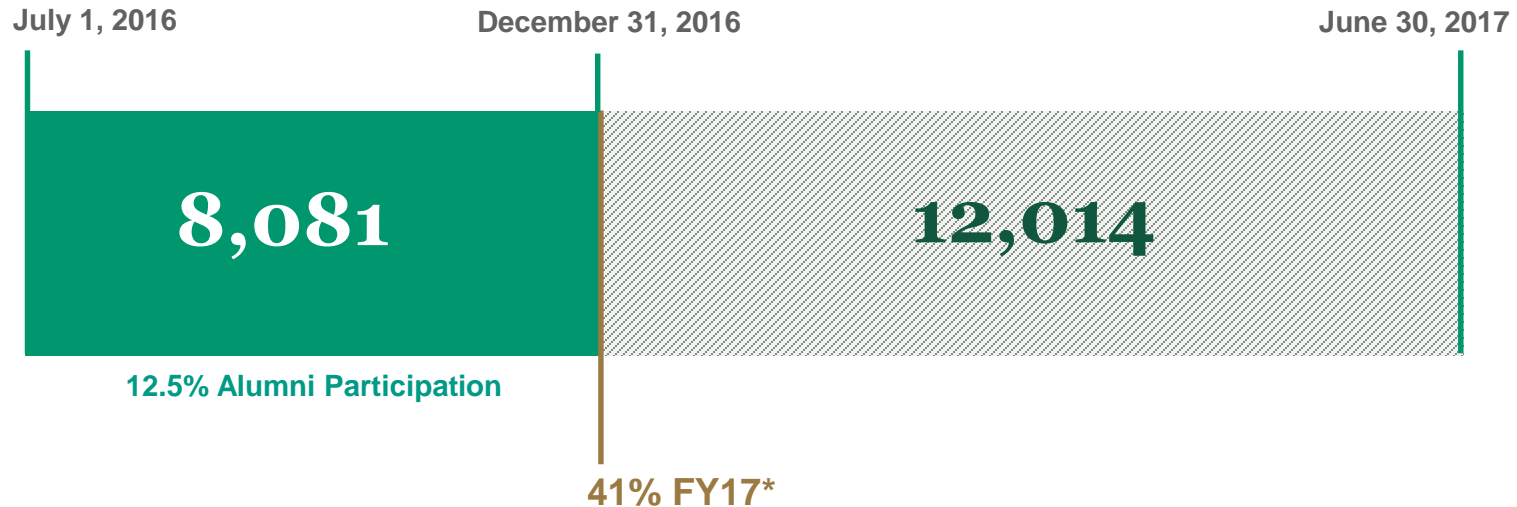
## FY17 Undergraduate Alumni Participation Goal

31%

(20,095 donors)

# Progress towards 31%

AS OF DECEMBER 31, 2016



*\*Last year, 55% of donors gave in Q3 and Q4.*

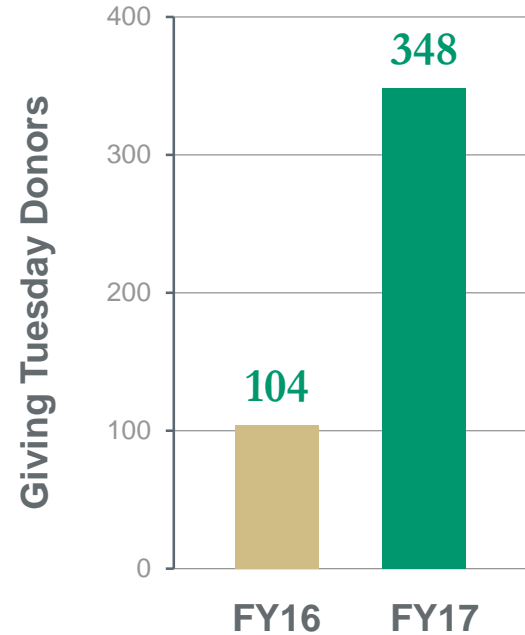
# Calendar Year-End Sprint

## #GivingTuesday

- FY16 104 gifts / \$22,559
- FY17 348 gifts / \$43,647

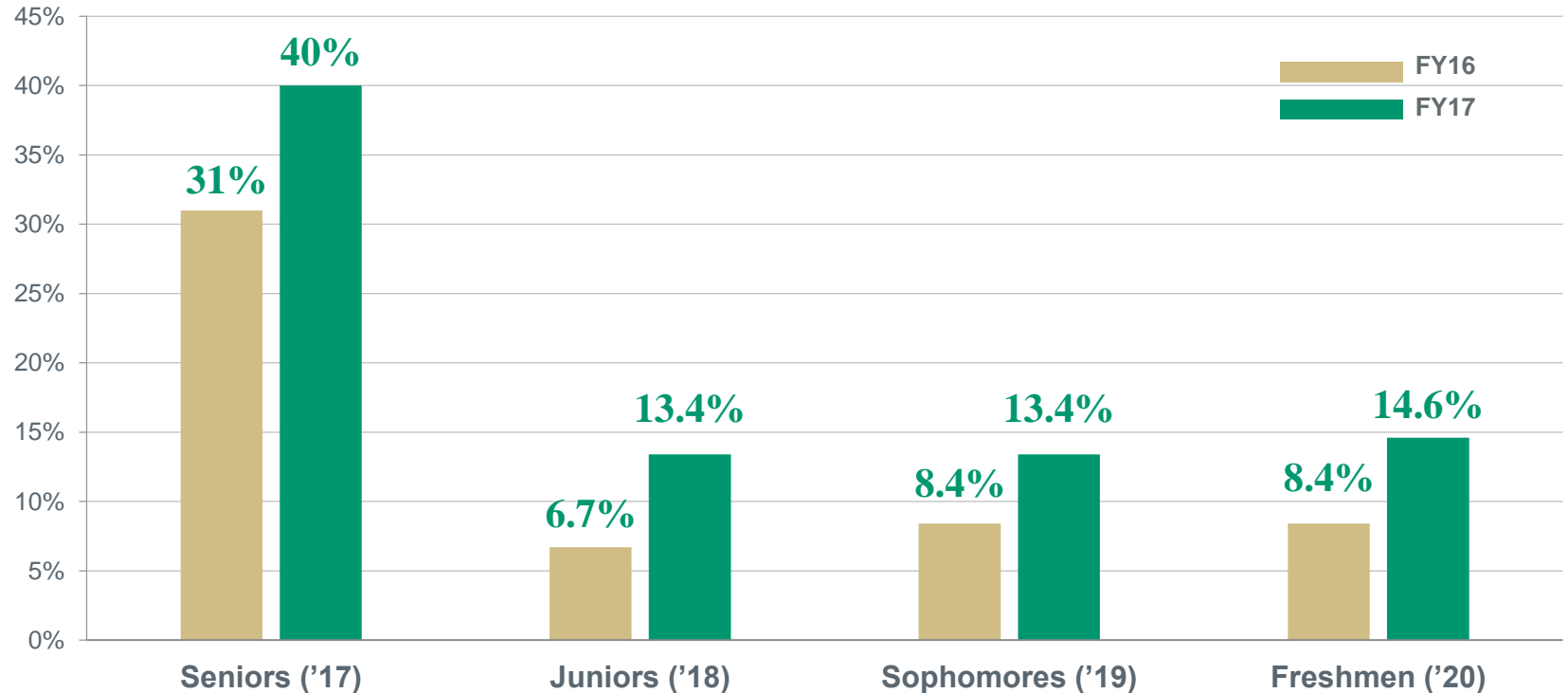
## Class Ambassadors

- 1,035 donors
- 3,000+ individual emails sent by CAs



# Student Philanthropy by Percentage

AS OF DECEMBER 31, 2016



# Reaching 31% Will Require:

## SECURING 12,014 MORE DONORS

### Identify core populations

- Detailed data analysis
- Strategic approach

### Enhance core fundamentals

- OTOD '17
- Class Ambassador Academy '17
- Regional presence and conversation

### Conduct micro philanthropy/campaigns

- Young alumni charter day campaign
- Tribefunding



# Populations of Opportunity & Focus



Reactivating  
lapsed consecutive  
year donors



Retaining  
new & reactivated  
donors



Reactivating  
lapsed  
low-end donors



Retaining  
Senior Class Gift  
donors



Increasing  
consecutive year  
donors



**3.28.2017**

A DAY FOR GIVING BACK  
AND PAYING IT FORWARD.

# Tribefunding

LAUNCHING APRIL 10, 2017

Opened registration in  
November 2016

Applications due in February 2017

Training in March 2017

Projects go live April 10, 2017



WILLIAM & MARY  
CHARTERED 1693

WAYS TO GIVE RECOGNITION ABOUT US [GIVE NOW](#)

W&M | TRIBEFUNDING

An entrepreneurial spirit and commitment to service run deep at William & Mary. *Tribefunding*, our crowdfunding initiative, helps the community dream up big ideas, fund bold projects and make a difference at W&M and far beyond.

**POWER TRIBE PASSIONS**

Every semester, a new group of campaigns will launch on GiveCampus, our crowdfunding platform. Visit the site to browse projects, join the community and support great ideas from the Tribe community.

[BROWSE PROJECTS](#)



---

Raise \$1 billion

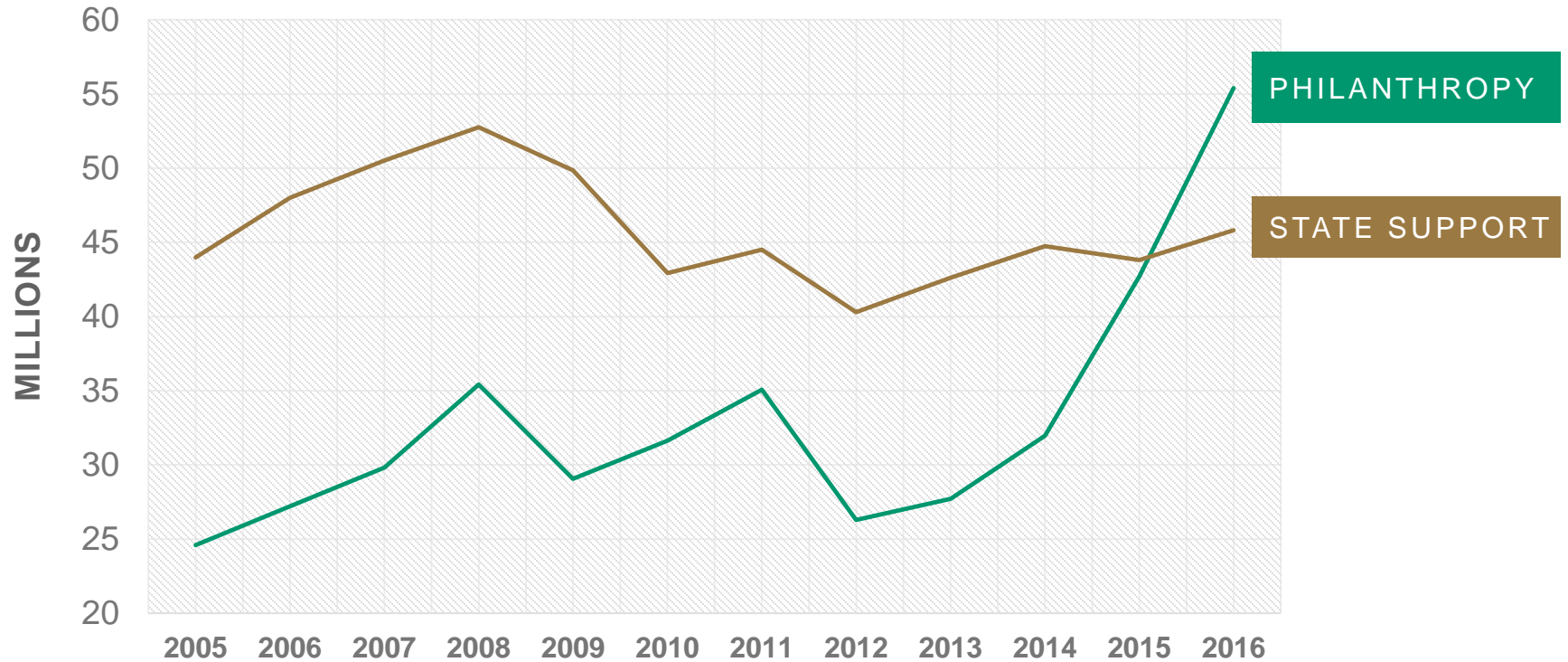


Total raised as of December 31, 2016

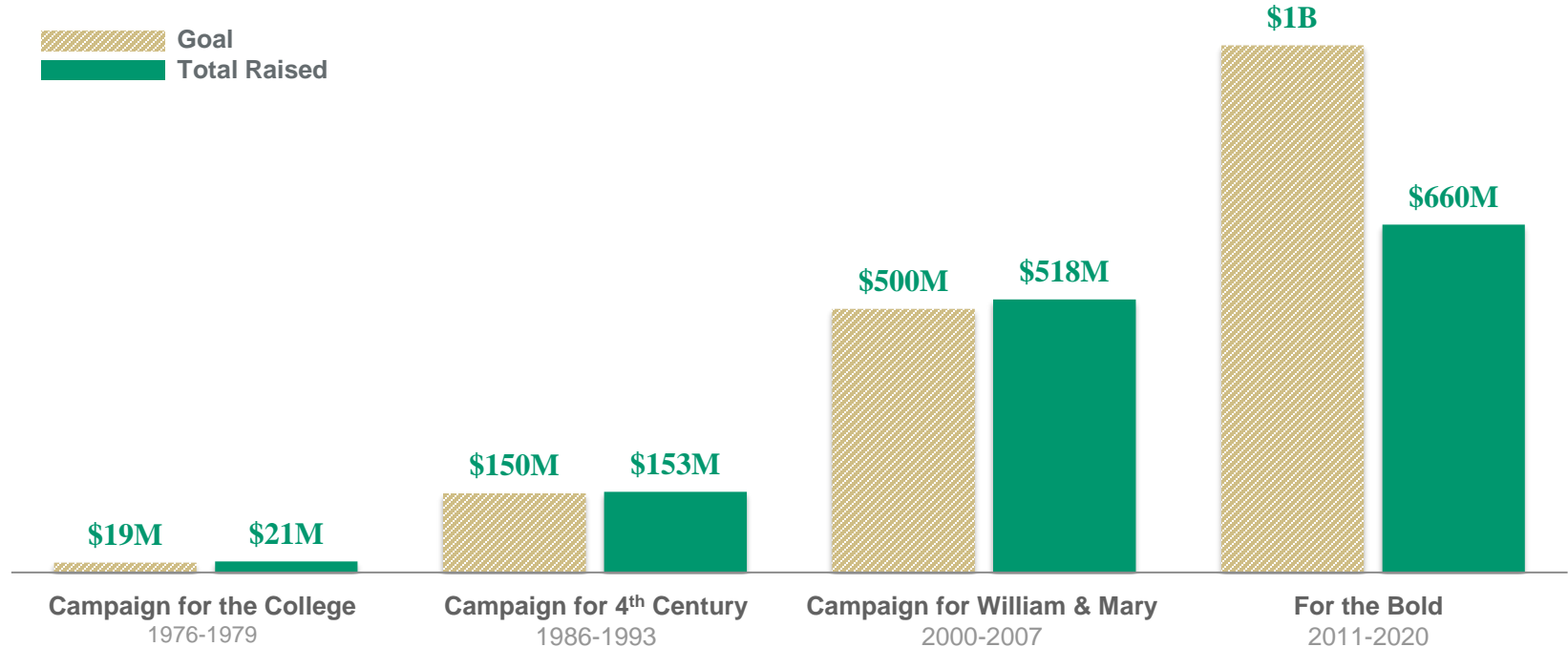
\$660.5  
MILLION



# Rise of Philanthropy



# William & Mary Campaigns



# U.S. News and World Report

## COMPARING OVERALL RANKING WITH FINANCIAL RESOURCE RANKING

*Only seven universities finish in the top 50 overall while finishing 60<sup>th</sup> or worse in financial resources.*

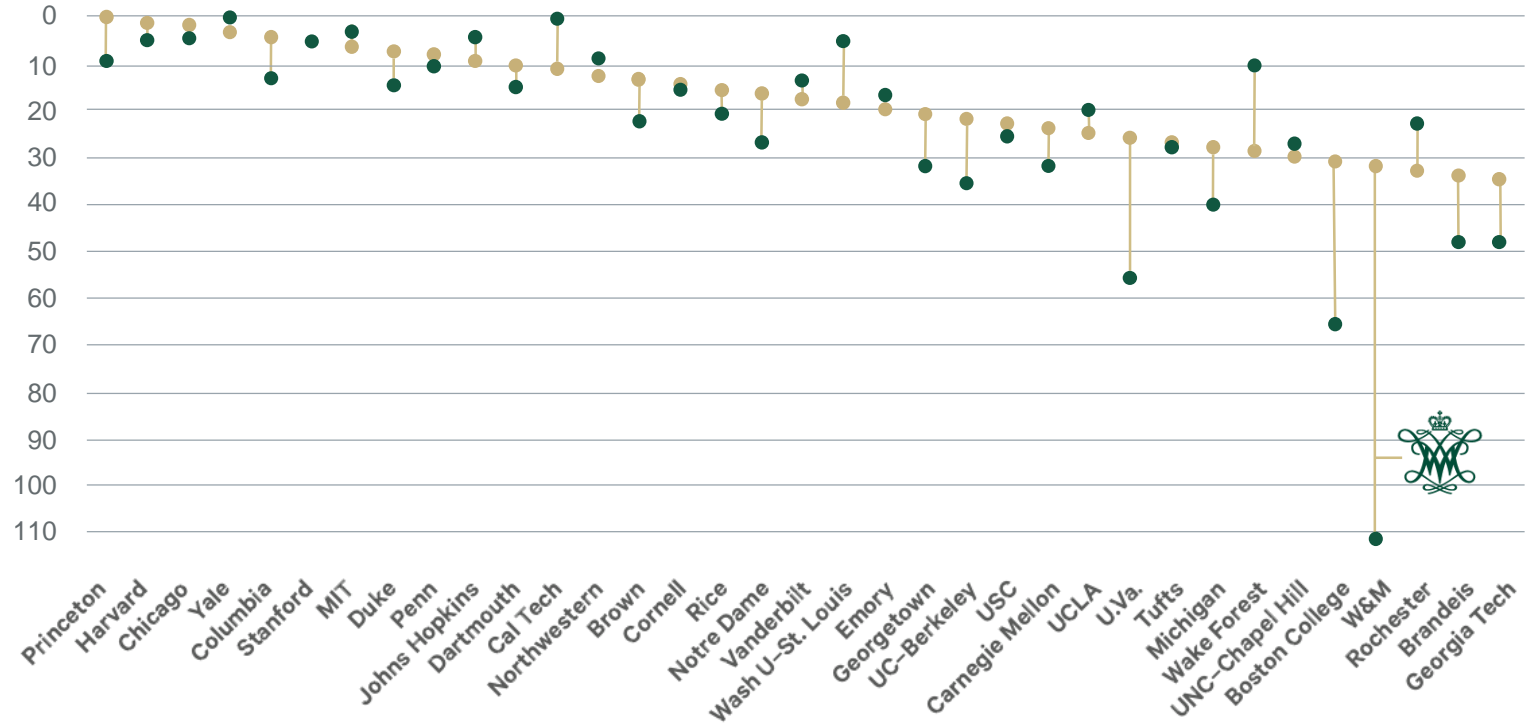
	OVERALL RANK	FINANCIAL RESOURCES	GAP
<b>William &amp; Mary</b>	<b>32</b>	<b>112</b>	<b>80</b>
Villanova	50	103	53
Northeastern	39	81	42
Boston College	31	66	35
UC-Santa Barbara	37	66	29
U. Wisconsin-Madison	44	63	19
Pepperdine	50	66	16

# 2017 U.S. News and World Report

COMPARING OVERALL RANKING WITH FINANCIAL RESOURCE RANKING

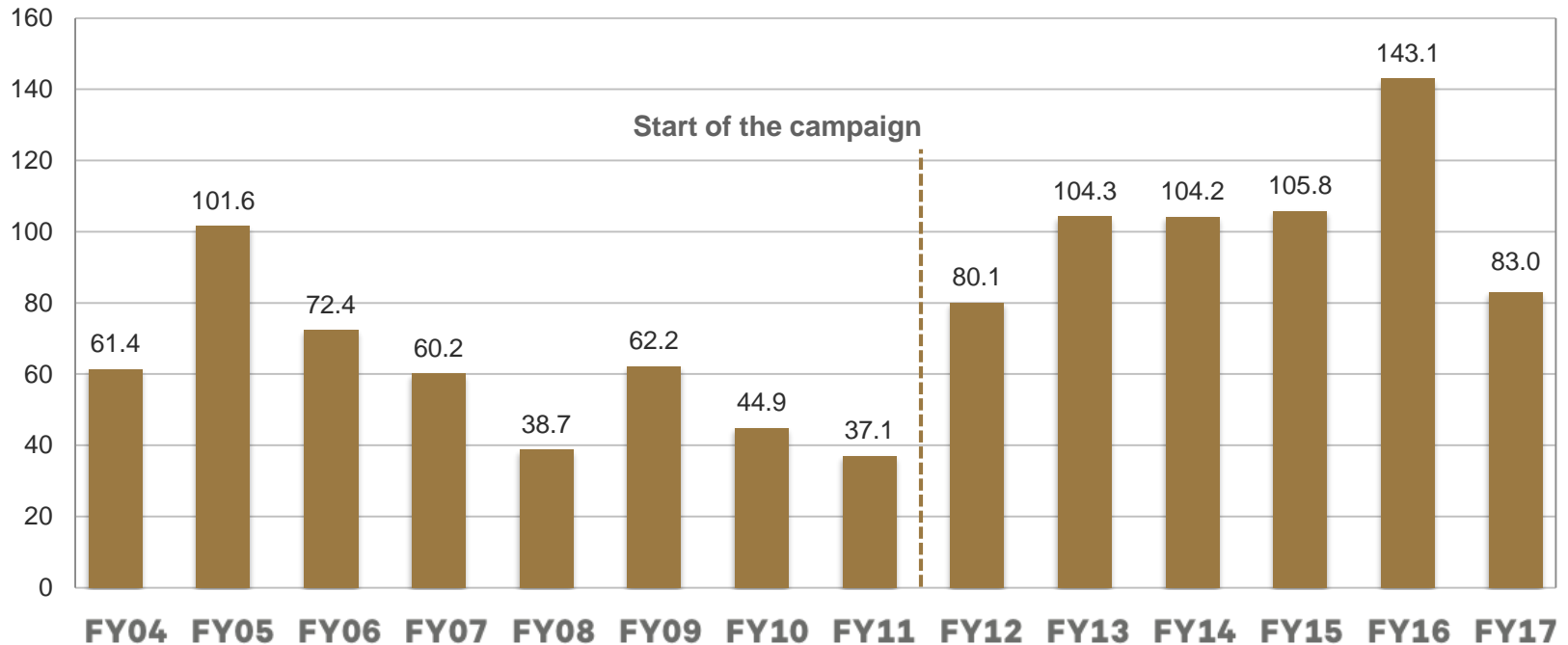
● Overall Rank

● Financial Resources Rank



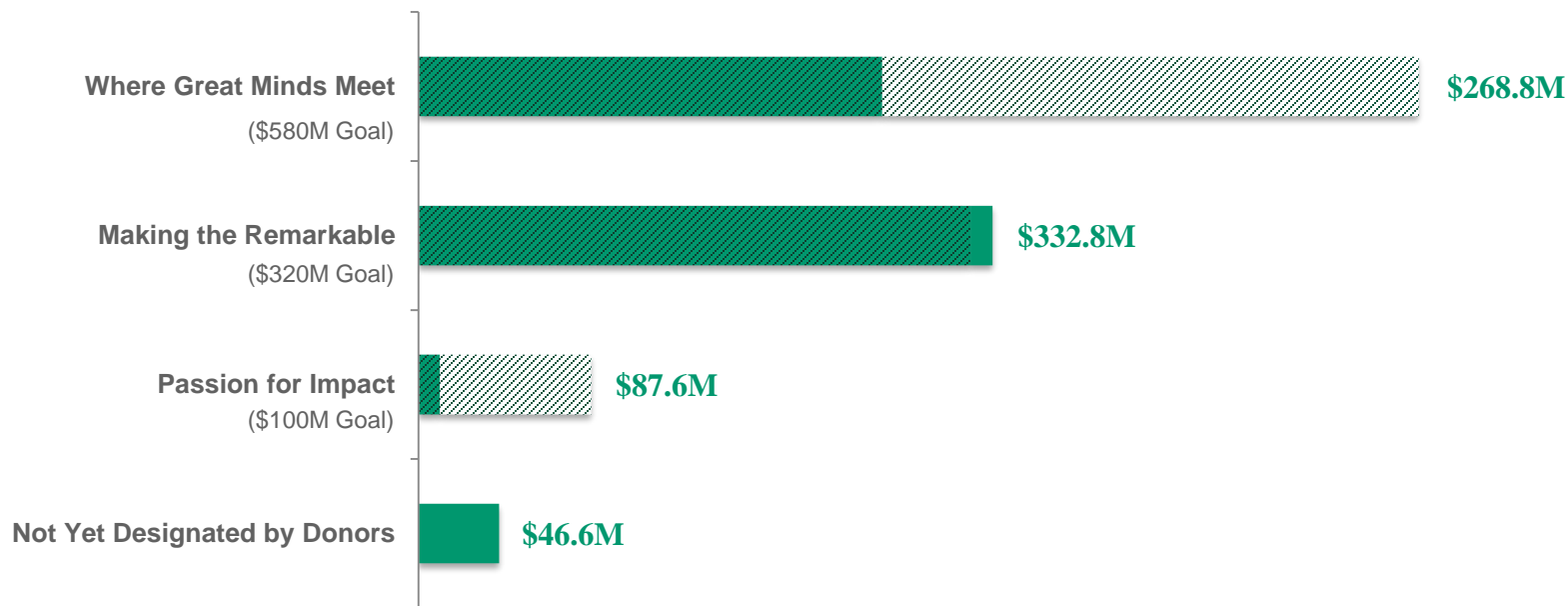
# New Gifts and Commitments

AS OF DECEMBER 31, 2016



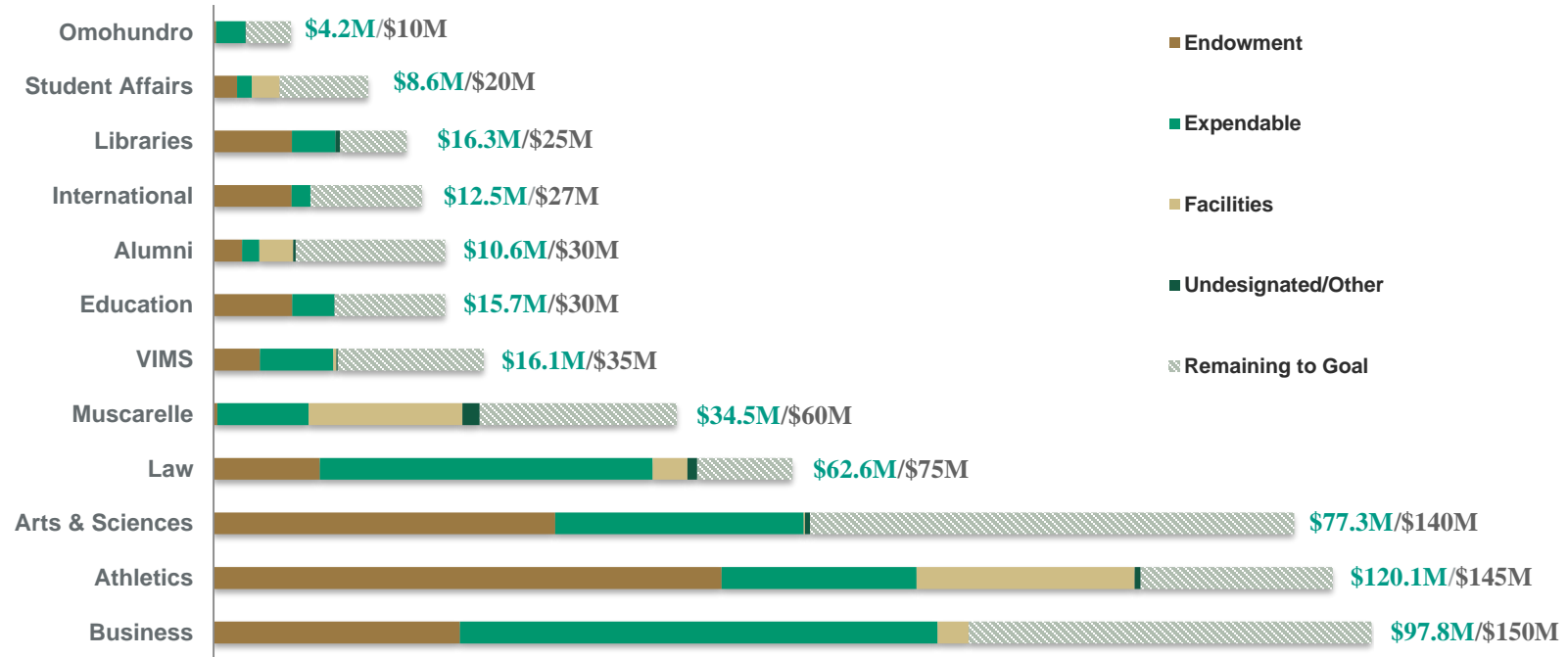
# Goals and Progress by Pillar

AS OF DECEMBER 31, 2016



# Goals and Progress by School and Unit

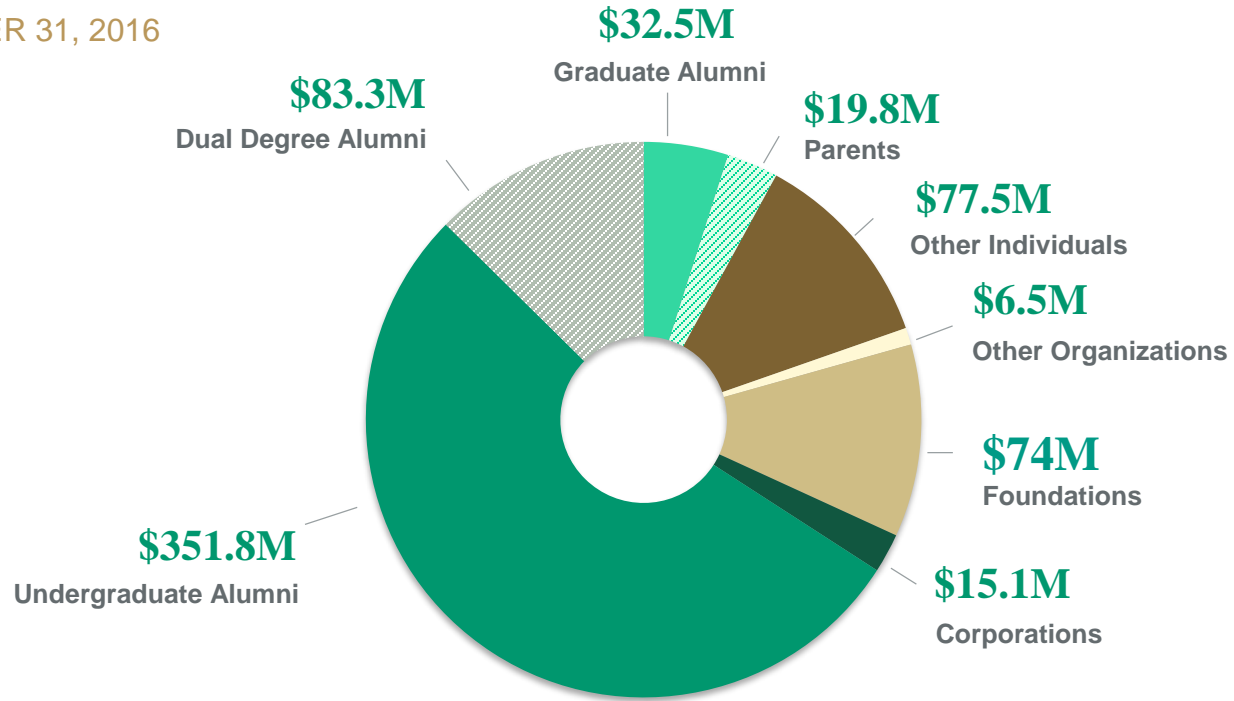
AS OF DECEMBER 31, 2016



*An additional \$184.2M has been raised toward the \$253M University-Wide goal.*

# Giving by Source

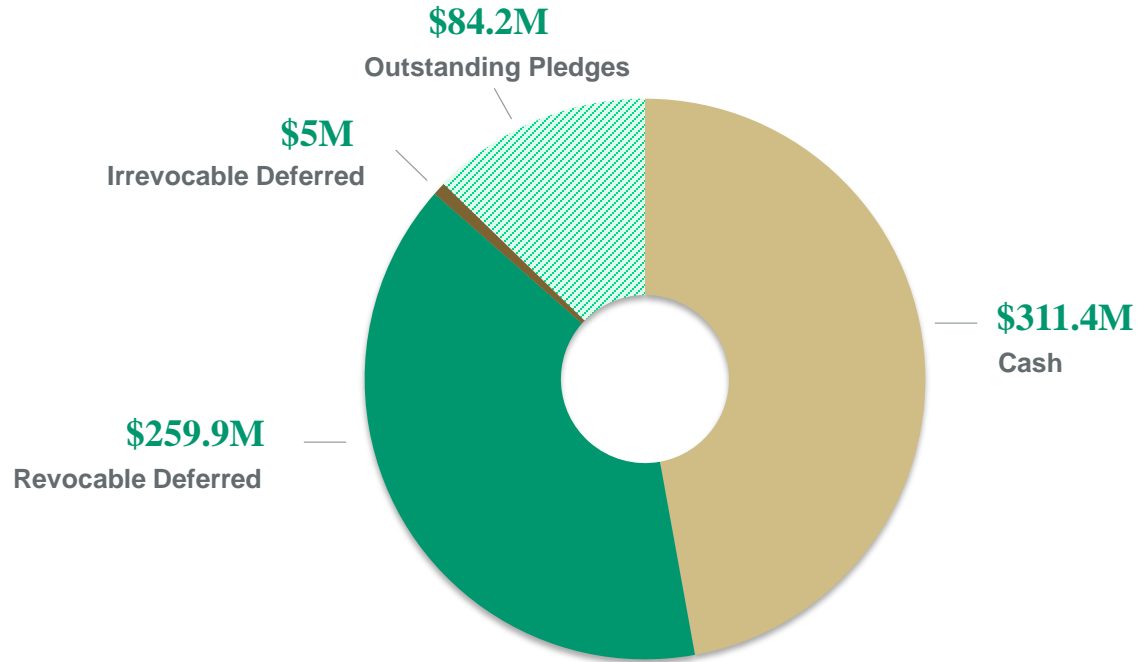
AS OF DECEMBER 31, 2016





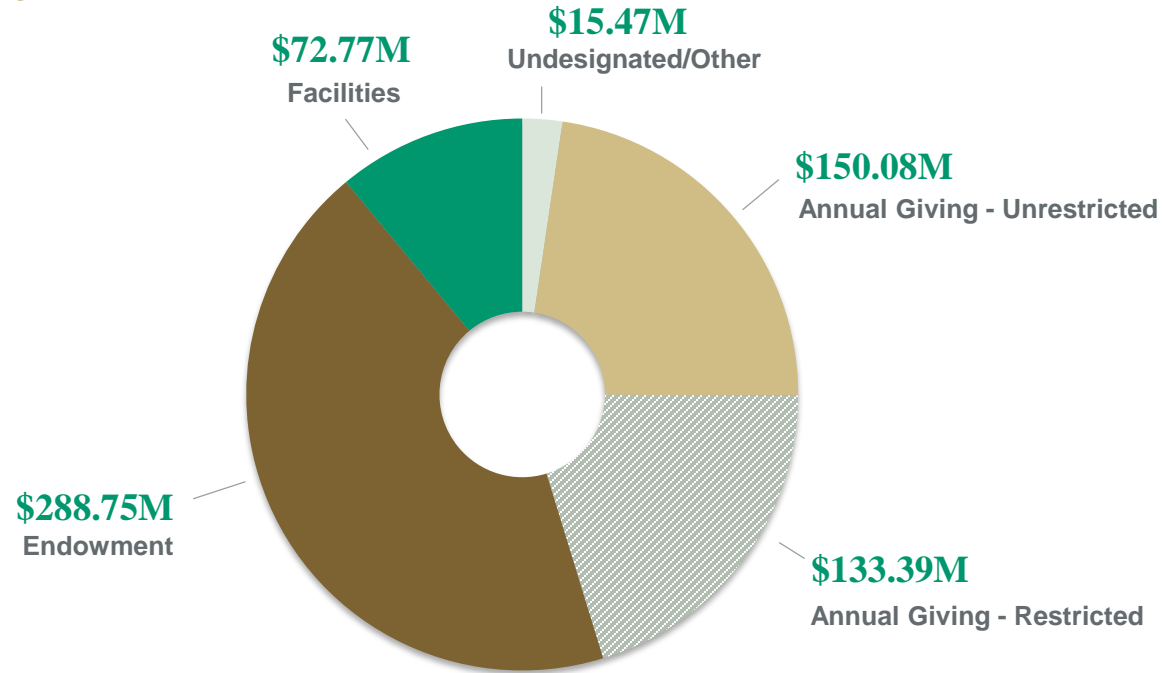
# Gifts and Pledges by Type

AS OF DECEMBER 31, 2016



# Gifts and Pledges by Purpose

AS OF DECEMBER 31, 2016



# W&M AFFORDING OPPORTUNITY



# Affording Opportunity: Campaign Gifts for Scholarships

	Scholarships Impact Fund		All Scholarships	
	Donors	Amount Raised	Donors	Amount Raised
2012	112	\$85,043	2,127	\$7,650,751
2013	104	\$31,997	2,399	\$30,110,479
2014	254	\$67,271	2,971	\$22,626,204
2015	928	\$754,601	3,839	\$48,231,100
2016	1,884	\$1,109,386	5,319	\$67,957,634
2017 (YTD)	629	\$457,293	2,365	\$33,038,972

# California and DC Celebrations

## For the Bold

IN LOS ANGELES

William & Mary invites you to be part of an extraordinary movement; to build on a remarkable legacy of achievement.



— MARCH —  
**17**

**THE HOME OF  
ALBA & THOMAS TULL P '19**  
...  
**WESTLAKE VILLAGE, CA**

**6:30 PM** COCKTAILS & HEAVY HORS D'OEUVRES  
**7:30 PM** PROGRAM • **8 PM** RECEPTION & DESSERT



## For the Bold

IN SAN FRANCISCO

William & Mary invites you to be part of an extraordinary movement; to build on a remarkable legacy of achievement.



— MARCH —  
**18**

**MENLO  
COUNTRY CLUB**  
2300 WOODSIDE ROAD  
WOODSIDE, CA 94062

**6:30 PM** COCKTAILS • **7:30 PM** DINNER & PROGRAM

HOSTED BY PATTY MARTIN HON '13, P '09 AND EFF W. MARTIN HON '13, P '09



## For the Bold

IN WASHINGTON, D.C.

William & Mary, the Smithsonian American Art Museum and the National Portrait Gallery invite you to an extraordinary evening. Join us as we embark on a bold movement and build on our legacy of achievement.



— APRIL —  
**27**

**SMITHSONIAN  
NATIONAL PORTRAIT GALLERY AND  
SMITHSONIAN AMERICAN ART MUSEUM**  
8TH AND F STREETS NORTHWEST

**6:30 PM** COCKTAIL RECEPTION • **7:30 PM** PROGRAM  
• **8:15 PM TO 10:00 PM** STROLLING SUPPER •



# The Power of Philanthropic Legacies

---

Kirsten Kellogg '91

Howard Busbee '65, J.D. '67, M.L.T. '68, P '90, '04



# Planned Gifts and William & Mary

Types of planned gifts

Role of planned gifts at William & Mary

Impact of planned gifts

Future outlook





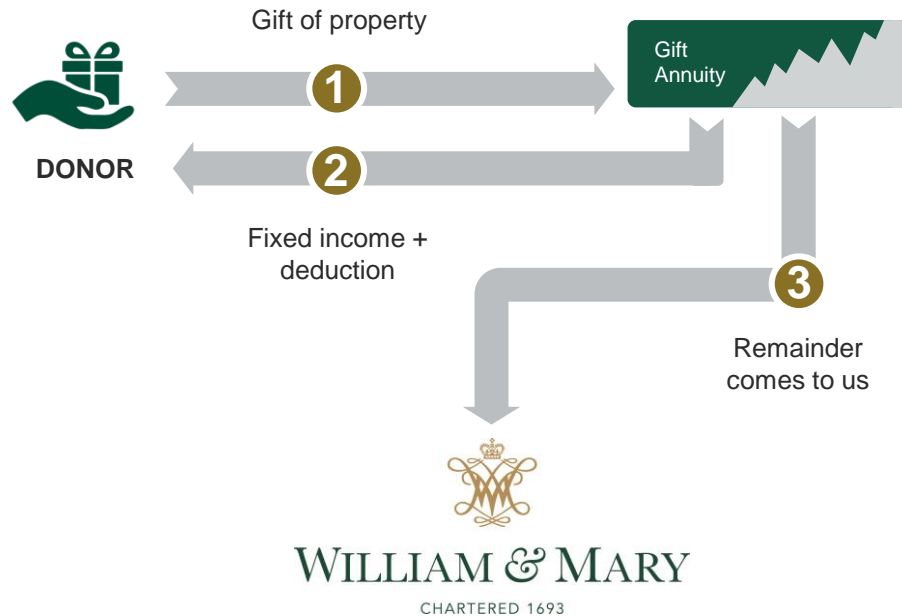


*"I see no new taxes, followed by some new taxes."*



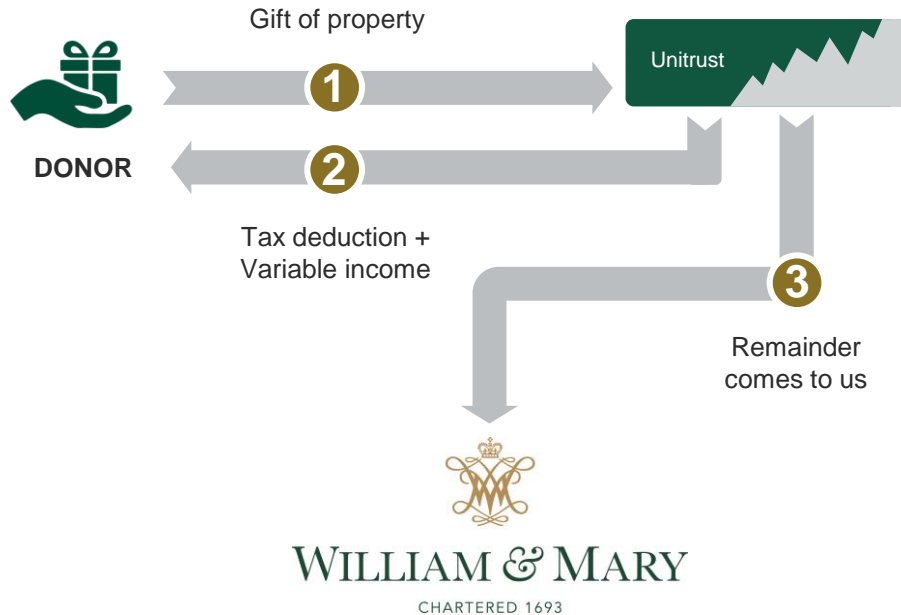
*"Well, we've licked taxes—that just leaves death."*

## Charitable Gift Annuity



# Gifts that Provide Income

## Charitable Remainder Unitrusts



## Gifts that Provide Income

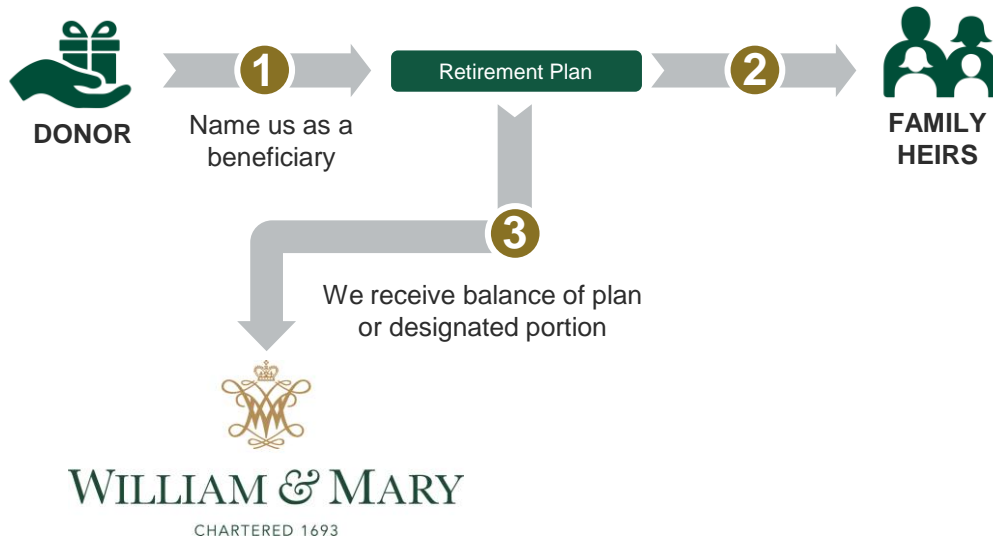
## Gifts From Your Will or Trust



## Gifts That Cost Nothing Today

**ULTIMATE GIFTS  
TO WILLIAM & MARY**

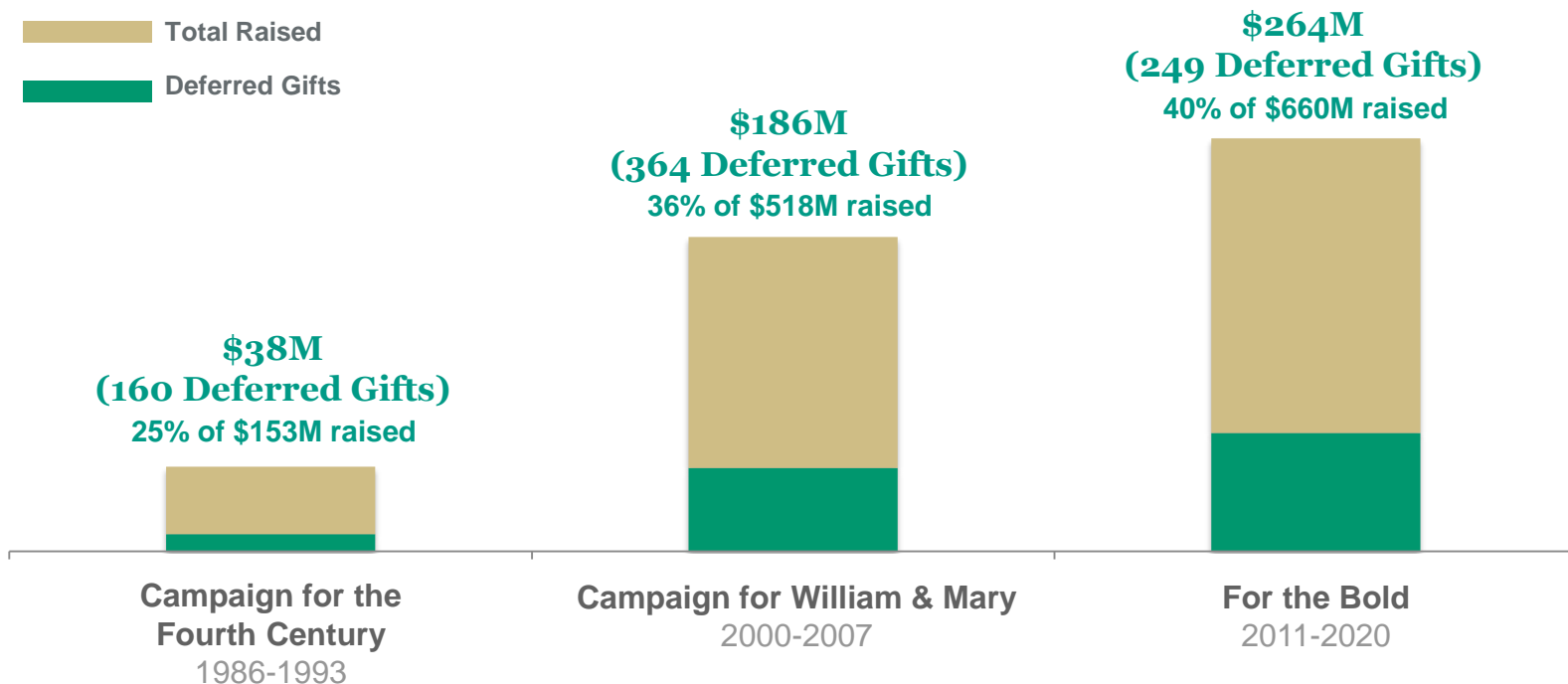
## Gifts From Your Retirement Plan



## Gifts That Cost Nothing Today

**ULTIMATE GIFTS  
TO WILLIAM & MARY**

# Impact of Deferred Gifts\* on Campaigns



\* Deferred gifts include irrevocable gifts and documented estate provisions.

# Estate Distributions

## RECEIVED AND PREVIOUSLY DOCUMENTED DURING *THE CAMPAIGN FOR WILLIAM & MARY*

- Of the 262 donors who documented provisions, 9 percent have passed away.
- Of this 9 percent, the provisions of 96 percent remained in place for William & Mary.
- These alumni and friends had documented a value of \$24.8M for these provisions during *The Campaign for William & Mary*.
- To date, William & Mary has received \$31.5M from these estates (an additional \$6.7M).



# Impact of Estate Gifts Received During *For the Bold*

William & Mary has received \$44M in estate distributions during *For the Bold*.

This includes previously unknown provisions (not documented to a prior campaign or donor did not inform us).

## **SIGNIFICANT IMPACT:**

- More than \$12.3M added to endowments – either previously existing or created via estate gift.
- More than \$9.9M for scholarships (expendable & endowed).
- More than \$11.2M in unrestricted funds for the general support of William & Mary.
- And \$10M for capital projects.



## Impact for All Time Coming

*Clockwise from left: Walter Zable '37, Frances Lightfoot Robb '48, Prof. Louis Catron with Glenn Close '74 & Kay Rouse Lark '76*



## Future Outlook

Baby Boomer Generation

Investment in Alumni Engagement

*A planned  
gift to  
William &  
Mary is  
one that  
lives  
forever.*





# For the Bold

---

THE CAMPAIGN FOR WILLIAM & MARY