

For the Bold

THE CAMPAIGN FOR WILLIAM & MARY

William & Mary University Advancement Update

With less than two years remaining in William & Mary's *For the Bold* campaign, the university has passed the \$800 million mark and is nearing its \$1 billion goal. As the No. 1 nationally ranked public university for participation with 28.7 percent of alumni giving back to alma mater in FY18, William & Mary has positioned itself as a leading university in philanthropic giving and engagement growth.

The university has seen a two-fold increase in donors during the campaign – resulting in 50,277 individuals giving last year – and boasts one of the highest donor retention rates in the U.S., with 74 percent of undergraduate alumni renewing their investment in alma mater year after year. There has also been a 110 percent increase in the number of alumni participating in new and expanded offerings – including new career and networking opportunities – since the start of the campaign in FY12

The following summary provides an update on the past fiscal year and an overview of the year ahead:

STRENGTHEN ALUMNI ENGAGEMENT

During the past year, University Advancement hosted more than 460 events in approximately 45 cities around the world. We continue to develop metrics designed to apply quantitative measurements to a very qualitative relationship-driven function, including engagement scores for alumni. Net Promoter Scores (based on a -100 to 100 scale, 50+ is considered excellent) have been implemented for all alumni events and the average NPS score for FY18 was 66, up from 53 in FY17.

A look back to FY18:

William & Mary Switchboard

As part of our efforts to expand career and networking services for alumni the William & Mary Switchboard is an online platform exclusive for alumni to ask, offer and connect with fellow alumni around professional needs and shared interests. Whether you need advice, know about a job opportunity or are seeking to connect with others in your field or city, Switchboard makes it easy to connect with other members. Since the platform was introduced in July 2017, more than 1,500 alumni and friends have taken advantage of the site (1,770 messages exchanged, 230 offers, 120 asks and 166 comments to posts).

W&M Volunteer Portal

With this new, modern system, our partners across campus will have the ability to advertise their volunteer needs to alumni, parents and friends of the university, and the resource will allow friends of W&M to find more dynamic and meaningful engagement opportunities than ever before. There have already been more than 1,100 volunteer accounts established and nearly 500 volunteer assignments made through the system.

Wren Traditions

Wren Traditions was formally launched this year to show students the importance of engagement and philanthropy. The goal is to highlight those aspects of the student experience that help to strengthen the W&M community and are made possible through University Advancement. Wren Traditions is designed to raise awareness of advancement's mission and to encourage lifetime involvement after graduation. It includes student engagement and philanthropy initiatives such as Legacy Brunch, the Homecoming Parade, Tag Day, Impact Weeks, One Tribe One Day campus carnival, Senior Wine and Cheese, Student Academic Prizes, Legacy Graduate Reception and Alumni Induction Ceremony.

University Milestones

The 50th Anniversary of African Americans in Residence was commemorated during the 2017-18 academic year. As part of that university-wide effort, several advancement initiatives were spearheaded. In February, the Law School marked the 64th anniversary of the graduation of Edward Augustus Travis, B.C.L. '54, the first African-American to graduate from William & Mary, as part their second African-American Alumni Weekend. That same month, the university announced the establishment of a scholarship endowment in honor of the late Carroll F.S. Hardy HON '12. During Legacy Weekend in April, fundraising was launched for the Legacy Tribute Garden - a \$150,000 project that will involve three phases, including the creation of endowment to support the garden in perpetuity.

Law School Reunion, April 13-14, 2018

For the second consecutive year, the 50th Reunion Class took home the Red-Hot Reveley Award for Outstanding Class Participation. Sixty-one percent of the Class of 1968 made a financial commitment in honor of their reunion. The 10 reunion classes raised more than \$6.4 million in gifts and multi-year pledges in support of William & Mary Law School. The weekend included the dedication of a new donor wall recognizing cumulative lifetime giving of \$100,000 or more and the introduction of The Order of Marshall-Wythe, the Law School's newest society of distinguished alumni. From now on, the 50th Reunion class and all members of prior classes will become members of The Order of Marshall-Wythe during Alumni Weekend.

Traditions Weekend, April 20-22, 2018

The second annual Traditions Weekend celebrated the 50th Reunion, Olde Guard and the Honorable Robert Boyle Legacy Society in a reimagined format. The festivities included social gatherings, academic sessions that featured the business school and military/veterans programs and special ceremonies designed to celebrate the legacy of these three distinguished groups. An impressive

56 percent of the Class of 1968 gave back to alma mater in honor of their 50th Reunion, resulting in more than \$17 million raised for their class gift. Nearly 600 attended with record attendance for the 50th Reunion.

Honorary Alumni Ceremony, May 11, 2018

In addition to awarding Student Academic Prizes, welcoming new graduates in the Alumni Induction Ceremony and honoring W&M families at the Legacy Commencement Reception, the Alumni Association hosted the annual Honorary Alumni Ceremony as part of Commencement Weekend. Six new honorary alumni were inducted into the Alumni Association ranks: Joe Gofus, Stephen Johnsen, Helen and Taylor Reveley, Joel Schwartz and the Honorable John Charles Thomas. The honorees were recognized for their exceptional service, support, and commitment to William & Mary. Honorary alumni are non-graduates of William & Mary who have gone above and beyond in their support of the Alma Mater of the Nation.

MBA Alumni Weekend, May 18-19, 2018

The Raymond A. Mason School of Business welcomed more than 300 MBA graduates and guests from across five decades for its first MBA Alumni Weekend. Following the success of the MBA 50th Anniversary event in the summer of 2017, the Business School has redoubled efforts to engage and recognize alumni. The weekend included faculty-led classroom sessions, an alumni-led panel, class reunion dinners and the launch of the Quittmeyer Society. The society is named in honor of Charley Quittmeyer, the founding dean of the business school, and recognizes MBA alumni who graduated 40 or more years ago. During the weekend, four full-time MBA classes held reunions and organized giving campaigns that resulted in the establishment of five new scholarship endowments.

W&M Weekend, June 1-3, 2018

Our third W&M Weekend was held in Chicago, where over 450 Tribe faithful gathered to connect with one another at more than 25 cultural, intellectual, social and professional events. Our ability to offer engagement experiences of this caliber depends heavily on friends willing to open doors and offer sponsorships. We are particularly grateful to Honorary Chair Michael Tang '76, P '13 and Co-Chairs Leanne Dorman Kurland '75, P '05 & Alex Kurland P '05 for leading this year's effort. The next W&M Weekend is slated for San Francisco in September 2020 in conjunction with the Stanford football game.

Alumni Admission Weekend, June 22-23, 2018

This admissions program is designed for rising high school juniors and seniors of William & Mary alumni to learn more about the college admission process and W&M in particular. Students have the opportunity to hear from experts in the field about the college admissions process, and families can experience the decision process through the eyes of an admission professional. Additionally, work is underway to build a more robust program to engage alumni in helping to recruit prospective students.

A look ahead to FY19:

University Milestones

During the 2018-19 academic year, the university will mark the 100th anniversary of coeducation at William & Mary. A highlight of the yearlong commemoration will be W&M Women's Weekend from September 21-23. Nearly 450 women have registered to participate in nearly 50 events throughout campus. The weekend will provide an opportunity for alumnae and friends to discuss big ideas, learn from one another and grow in the eight dimensions of wellness: emotional, environmental, financial, intellectual, professional, physical, social and spiritual. Highlights include an opening performance with Anna Deavere Smith and keynote lunches with Ellen Stofan '83, D.Sc. '16, P '10, P '14, the first female director of the Smithsonian's Air and Space Museum and Kathryn Carter '91, former president of Soccer United Marketing, the commercial subsidiary of Major League Soccer.

Presidential Welcome Events

Our 28th president, Katherine A. Rowe, was sworn in at noon on July 2, in the Great Hall of the Wren Building. Dr. Rowe began to meet with small groups of alumni, donors and students even before her swearing in, including surprise visits to the Society of 1918 event and the Hulon Willis Association. We look forward to introducing President Rowe to the broader W&M community at welcome events around the world:

- Richmond - June 7
- Williamsburg - August 22
- Washington, D.C. - Sept. 4-5
- New York - Sept. 6-7
- Washington, D.C. - October 3-4
- New York City - December 4-5
- Richmond - December 10
- Florida - February 2019
- California - March 2019
- South Hampton Roads - May 23, 2019

William & Mary Night at Nationals Park, August 7, 2018

Nationals Stadium was filled with green and gold as 1,650 alumni, students, family and friends celebrated William & Mary with a night of baseball. The game was part of the Washington Nationals' College Day series, themed games celebrating universities in the greater D.C. area. William & Mary had one of the most attended College Series games this season, selling out all available tickets. Tribe Pride was on full display, with attendees wearing W&M/Nationals co-branded baseball hats, made by the Nationals and New Era specifically for this game.

Fall Awards Banquet, September 20, 2018

Each fall the William & Mary Alumni Association Board of Directors honors individuals by awarding the Douglas N. Morton '62 Alumni Service Awards, the Alumni Fellowship Awards, a Staff Service Award and the Coach of the Year. This year's honorees for the service awards are Joanna Lee

Ashworth '84, Latoya C. Asia J.D. '09, C. Paul Brockwell, Jr. '07, Kathryn H. Floyd '05, Honorable T. Montgomery Mason '89, Emily Gerdelman Ridjaneck '07 and Brian J. Focarino '11, J.D. '15. Alumni Fellowship recipients are Alexander Angelov (religious studies), Marcus C. Holmes (government), David M. Long (business), Anya Lunden (English) and Anke Van Zuylen (mathematics). The Coach of the Year is Chris Norris '95 (men's soccer) and Sandra A. Scott (parking Services) will receive the Staff Service Award.

Tribe Serves, Sept. 21-30, 2018

TribeServes is a Young Guard Council initiative to kick off the year and welcome new alumni. It is a 10-day initiative, kicked off over Women's Weekend, with events held across the country.

Homecoming & Reunion Weekend, October 18-21, 2018

Last year's Homecoming & Reunion Weekend had an NPS score of 65 and was attended by a record of alumni (4,345) with more than 175 events. This coming Homecoming on Oct. 18-21 will feature parade Grand Marshal Ruth W. Tillar '45. Highlights will include a Shark Tank competition (part of ITPIR's 10th anniversary celebration), a concert with Chip Esten '87 and N'est Pas, and numerous opportunities for alumni to connect and engage with affinity groups: Alumni Band Organization, Association of 1775, LGBTQ Alumni, Hulon Willis Association, LatinX, Olde Guard, Order of the White Jacket and Young Guard. The annual Scholarships Luncheon and Jazz in the Garden giving societies event will also be part of the weekend.

Yule Log Celebrations, December 2018

Last December, more than 2,200 alumni and friends participated in over 30 different events hosted around the country, including the campus celebration, which was also streamed online. Attendees are encouraged to support their local student scholarship or to the Alumni Leadership Fund. Planning is underway for this year's Yule Log ceremonies, and President Rowe will participate in the NYC celebration on December 4 and in the Richmond ceremony on December 10.

ACHIEVE 40 PERCENT ALUMNI PARTICIPATION

We ended Fiscal Year 2018 with 28.7 percent of undergraduate alumni giving during the year, the second highest rate in our history. Among all the schools that reported alumni giving data to U.S. News, the average was 11.6 percent in 2017. Alumni giving is a critical component of the overall national rankings and is vital to the future of our university. According to the most recent U.S. News rankings, William & Mary placed 17th overall among national public and private universities in alumni giving, which is up from 18th a year ago and 35th since the start of the campaign in 2011. Of particular note is that William & Mary now ranks above all public universities, and many prominent private universities, including two Ivy-league institutions – Yale and Cornell – for alumni participation.

While other universities are experiencing significant drops in alumni participation, William & Mary continues to buck that trend. Our consistent success adds value to a W&M degree and is a point of

pride for all of us in our personal and professional lives. The fact that we are reaching historic levels in alumni participation is a testament to the deep connections that alumni have made with each other and alma mater. Data suggest that our donor growth over the last five years is the best in the nation.

A look back to FY18:

Honors Fellowships, March to April 2018

2018 marked the 10th year of Honors Fellowships fundraising with 95 percent of projects being funded through 1,230 gifts totaling \$338,000. In 10 years, 418 Honors Fellows have been funded.

One Tribe One Day, April 10, 2018

William & Mary celebrated the fifth annual One Tribe One Day on April 10 and surpassed all previous records made on the university's single biggest day of giving. An impressive 12,770 donors participated in the effort, marking a nearly 570 percent increase in the number of donors who gave compared to its first giving day in 2014 when 1,906 individuals gave back. Since its inception as part of the For the Bold campaign, more than 25,000 donors have participated in One Tribe One Day. The Gerdelman Challenge, which provides awards to schools and/or units that are most involved on One Tribe One Day, resulted in grants to Athletics (total donors), Arts & Sciences (new donors), VIMS (most improved) and Student Affairs (honorable mention).

In all, nearly \$2.5 million was raised, thanks to the generous support of alumni, parents, students, faculty, staff and friends. Festivities were held around the world from the Sunken Garden to Beijing, Los Angeles and beyond. Despite its smaller alumni base, W&M outperforms universities with larger alumni bodies and has become national model for other giving days. This year's OTOD is scheduled for Tuesday, April 16, 2019.

FY18 Student Philanthropy

The freshman, sophomore and junior classes all surpassed their goals of 25 percent participation with 25.7 percent, 28.7 percent and 26.8 percent participation respectively for the first time in William & Mary's history. Senior Class Gift participation fell just below its goal of 70 percent with a final tally of 69.1 percent of seniors contributing.

Fiscal Year End Push

In an effort to bolster participation efforts, Advancement staff were each assigned a participation portfolio of 50 people for FY18. More than 2,250 donors from those portfolios made a gift to W&M during the course of the year. The third annual Class Ambassador Academy was held on campus on June 8-9 to encourage young alumni to make gifts. Additionally, President Reveley hosted Young Guard farewell events in Richmond, Arlington, NYC and DC. More than \$XXX was received in the last X days of the fiscal year to push the campaign past the \$800 million mark. Gifts under \$XXK made in honor of President Reveley and to join the Society of 1918 were a large factor in this success.

A look ahead to FY19:

Stewardship Month, July 2018

This past July we launched our inaugural stewardship month to thank all donors in the previous fiscal year and to highlight the impact of annual giving. An email was sent to all FY18 donors with a thank you video and a link to a story on our year-end results. This was followed by a digital distribution of the Scholarships Impact Fund Report to all scholarships donors who had not already received a print version. Emails were also sent to all FY18 donors who are NOT in giving societies thanking them for their gifts (first gift ever, longevity, renewals, Young Guard, etc.). Giving society letters were then sent out in August.

Tag Day, October 10, 2018

On Tag Day, Students for University Advancement “tag” people, places and things on campus that would not be possible without private giving. Tag Day helps current students become aware and appreciate the impact of private philanthropy across William & Mary and the difference that donors make to their student experience inside and outside the classroom.

Impact Week, October 29 – November 2, 2018

Impact Week helps to educate current students about the power of giving. It is a week-long competition in which three student organizations compete to receive grant funding to execute their proposed community service project that benefits the local William & Mary or Williamsburg community. To receive their funding, organizations must encourage their peers to vote for their project in the form of a \$5.00 gift that can benefit any area of campus. Nearly 400 students gave during Impact Week.

Tribefunding, November 1 - December 15, 2018

Tribefunding, our crowdfunding initiative, helps the community dream up big ideas, fund bold projects and make a difference at W&M and far beyond. Every semester, groups of William & Mary students, faculty and staff submit applications and a new wave of campaigns launches. Through three rounds of Tribefunding, more than \$50,000 has been raised from 976 donors. The average Tribefunding gift is \$75.

RAISE \$1 BILLION

As of June 30, we had secured \$800,183,178.87 toward the priorities of our For the Bold campaign. This is a stunning achievement, accomplished only by the collective generosity of our loyal community. Gifts and commitments for the year totaled \$87.9 million. Our contribution/gift income for FY18 was \$72.9 million. This is the cash that actually came in the door, including pledge payments, realized bequests, and so forth. This is \$10 million more than what we received in FY17. Of special note, William & Mary Law School surpassed their \$75 million campaign goal.

A look back to FY18:

New Campaign Initiatives

Recognizing that new priorities emerge during the course of a fundraising campaign, several new initiatives were added to the For the Bold website: Diversity & Inclusion; Health & Wellness; and Women. Each page highlights opportunities to support new and existing funds that benefit these key areas that are integral to the William & Mary community.

Campaign Celebrations

Southeast Regional Campaign Co-chairs Dave Eklund '82, Fred Henritze '76, Tom Hollowell '65, J.D. '68, M.L.T. '69, Julee Wallace Kaplan '90, M.Ed. '94, Jim Kaplan M.B.A. '92 and Brooke Tribble Weinmann '79 did an exceptional job bringing 115 members of the Tribe together in Atlanta on October 5 at the High Museum of Art. Thanks to Fred Henritze '75 the King & Queen Buildings were lit in Tribe colors as was the SkyView Ferris Wheel, thanks to Tom Hollowell '65, J.D. '68, M.L.T. '69.

More than 400 gathered at the Virginia Museum of Fine Arts (VMFA) in Richmond on March 27, 2018, to celebrate our For the Bold campaign, hosted by Rob '74 and Jean Estes '75. In addition, nearly 70 alumni, parents and friend attended a viewing party at The Overview thanks to the help of Jim Ukrop '60, L.H.D. '99. The Main Street Station shed and clock tower were lit in Tribe colors for the night. The VMFA exterior was also lit in green and gold with the For the Bold logo projected on the exterior.

A few weeks after Commencement, our focus was on Chicago as the Tribe headed west for the Central Region's campaign celebration on May 31. We gathered with the dolphins in the Shedd Aquarium thanks to Mike Foradas '78 & Valerie Foradas and Tom Watkins '74, P '05, P '11 & Wendy Watkins P '05, P '11 who hosted the event and created an unforgettable evening for all.

Society of 1918

The Society of 1918 is dedicated to celebrating the power of women's philanthropy. Members are joining together to fund the Alumnae Initiatives Endowment to support programming that grows engagement, leadership and philanthropy of W&M women. The first Society of 1918 event, All Aboard, was held on March 23, 2018 and was attended by 90 women. The event consisted of a series of keynote presentation and panels about serving on corporate, nonprofit and elected/appointed boards. Then President-elect Katherine A. Rowe, who is now a Charter member herself, made a surprise appearance to begin the day-long event. The Society of 1918 continues to grow at a rapid rate, eclipsing all initial membership and fundraising goals. Results for that effort – along with goals for FY19 – will be formally announced at the inaugural W&M Women's Weekend on September 21-23, 2018.

President Emeritus Reveley Tributes

Over \$4.7 million was raised from more than 550 members of the W&M community in honor of President Emeritus Taylor Reveley. Gifts supported the Taylor Reveley Classroom at the Law School, the establishment of two scholarships – the W. Taylor Reveley, III Scholarship for undergraduate students and the W. Taylor Reveley, III Law Scholarship and the creation of the Reveley Garden, a formal garden between Ewell Hall and Jefferson Hall, with improvements stretching all the way to Crim Dell. The groundbreaking ceremony for the Reveley Garden was held on June 13, 2018, and the majority of the work is scheduled for completion by summer 2019.

Affording Opportunity

Scholarships remain the highest priority of our university in this campaign. In FY18 we raised \$20.1 million for scholarships, bringing our campaign total to \$251 million of our \$350 million goal. In late March we sent a new report to 1,300 alumni, parents and friends who have supported the Scholarships Impact Fund during the campaign. This past year's One Tribe One Day saw a 25 percent increase, a new record, in donors investing in the Scholarships Impact Fund. The average annual need-based scholarship is approximately \$15,000, so effectively four scholarships were funded on that one day!

During the campaign, we've increased our total number of endowed scholarships by 35 percent – from 735 to 995. We've increased our total number of named expendable scholarships by nearly 70 percent, from 190 to 322. Estate provisions are also a significant component of scholarships commitments, accounting for 59 percent of dollars raised to date. This compares to about 37 percent of dollars raised to date for the campaign overall.

Plumeri Awards for Faculty Excellence

This year marked the 10th anniversary of the Plumeri Awards for Faculty Excellence. Since their inception, more than 170 recipients have been designated with the honor. Each year, the awards recognize 20 faculty members for outstanding achievements in teaching, research and service. Joseph J. Plumeri '66, D.P.S. '11, established the award in 2009 to encourage exceptional faculty members to pursue their research interests and further challenge their students. For the last decade, the Plumeri Awards have helped ensure that our faculty have received the proper recognition for all that they do for our students and scholarly community and that William & Mary remains at the forefront of teaching and scholarship.

Capital Projects

- Shenkman Jewish Center - Groundbreaking on February 7
- Mackesy Squash Court - Ribbon cutting and dedication on February 8
- Davis Hall (VIMS) - Dedicated on April 13
- Alumni House Renovation and Expansion - Groundbreaking on April 22
- Reveley Garden - Groundbreaking on June 13

Gift Announcements

- [William & Mary's Business School to Launch Center for Online Learning](#)
- [W&M alumna makes \\$1.5 million gift in honor of President Katherine Rowe](#)
- [Gifts totaling more than \\$4.7 million honor William & Mary's 27th president](#)
- [Economics majors to see boost in scholarship support](#)
- [Couple gives \\$1 million scholarships gift to encourage the great legal minds of tomorrow](#)
- [Affording Opportunity: W&M community honors the late Carroll F.S. Hardy HON '12 with namesake scholarship](#)
- [Challenge Grant from Mary Morton Parsons Foundation to support Reveley Garden project](#)
- [Educating the Leaders of Tomorrow](#)
- [Hixon family gives \\$1.8 million to fund international scholarships](#)
- [Hewlett Foundation gives \\$1.5 million grant to support AidData](#)
- [Mellon Foundation grant to support inclusiveness in undergraduate research](#)
- [Class of 1967 Celebrates 50 Years with Generous Gift](#)
- [William & Mary Law School receives \\$5.2 million gift to support scholarships and other priorities](#)

A look ahead to FY19:

Campaign Celebrations

On May 23, 2019, Bee McLeod '83, M.B.A. '91 and Goody Tyler HON '11 and Peter and Penny Meredith '83 will host our Campaign Celebration in South Hampton Roads at the Chrysler Museum of Art in Norfolk.

Capital Projects

- McLeod Tyler Wellness Center - Dedicated on August 28
- Century Project - Groundbreaking scheduled for October 17
- Shenkman Jewish Center - Dedication scheduled for November 14

Lemon Project Memorial to the Enslaved

Former Rector Jeff Trammell is working with the former Rectors and Cypher Society members to lead the charge on fundraising for the recently announced Lemon Project Memorial to the Enslaved on campus. Thus far he has received very strong response from those former members of the Board of Visitors and is seeking additional gifts from current and former BOV members. A new website has been created on the campaign/giving site with more information about the project. Lemon Project Director Jody Allen is working closely with University Advancement to contemplate broad-based fundraising initiatives, including Tribefunding.

IMPORTANT DATES:

- **W&M Women's Weekend** - September 21-23
- **President Rowe Welcome Events, Washington, D.C.** - October 3-4
- **Tag Day** - October 10
- **Century Project at Busch Field Groundbreaking** - October 17
- **Homecoming & Reunion Weekend** - October 18-21
- **Scholarships Luncheon** - October 19
- **Impact Week** - October 29 - November 2
- **McGlothlin Leadership Forum** - October 30 - November 1
- **Tribefunding** - November 1 - December 15
- **Shenkman Jewish Center Dedication** - November 14
- **Giving Tuesday** - November 27
- **Yule Log Celebrations** - December
- **President Rowe Welcome Events, New York City** - December 3-4
- **President Rowe Welcome Event, Richmond** - December 10
- **Honorary Alumni Nominations Due** - January 15
- **Homecoming Grand Marshal Nominations Due** - January 15
- **Inauguration and Charter Day Weekend** - February 8-10
- **Tribefunding** - March - April 2019
- **One Tribe One Day** - April 16
- **Impact Week** - March 11-15
- **Alumni Medallion Nominations Due** - April 1
- **Douglas N. Morton '62 Alumni Service Awards Nominations Due** - April 1
- **Traditions Weekend** - April 5-7
- **Law School Reunion** - April 12-13
- **Commencement Weekend** - May 10-12
- **MBA Alumni Weekend** - May 17-18
- **South Hampton Roads Campaign Celebration** - May 23
- **Alumni Association Board of Directors Nominations Due** - July 1