

The William & Mary Alumni
Association
Annual Meeting

FY21 Year in Review



WMAA Board of Directors

Anna Hatfield '96
Janet Osborn '85
David Scott '93
John Cole Scott '00
Marie Bentley '93
D. Bruce Christian '73
George Crusier '84
Gail Croall '77
Jean Estes '75
Willis Gee Jr., '99
Brian Focarino '11, J.D. '15
Alice Givens '94
Glenne Harding, '65
Michael Hoak MA '02

Scott Kelsey '06, MAcc '07
Tina Kenny '92
Barbara Marchbank '84
Carla Moreland '81, J.D. '84
Natasha Moulton-Levy '95
Todd Norris '86
Fred Palmore III '67
Hodan Seager, '18
Umesh Trikha '03
Bruce Oliver '68 Olde Guard
Kayla Sharpe, '17 Young Guard
Jordan Strong '22 SUA

About Us

- Founded July 4, 1842
 - Incorporated 1923
 - 8th Oldest Alumni Organization
 - All Alumni are Members of the Non-Dues Paying Association
 - Independent Nonprofit - 501(c)3
 - 24 Member Governing Board
 - June 2014 MOU between WMAA & University
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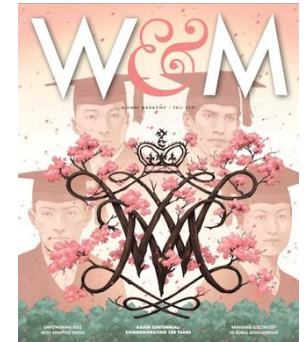
Alumni Association Mission Statement

The Alumni Association will cultivate a vibrant and inclusive alumni community committed to deepening connections with each other and William & Mary for all time coming.



Key Characteristics of a High Performing Alumni Association

- Signature Events
- Differentiated Outreach Programs
- Alumni Career Management & Professional Networking
- Online Virtual Engagement Programming
- Exceptional Alumni Communications



WMAA Strategic Priorities

1. Create opportunities to engage alumni with each other and alma mater
2. Promote an inclusive culture of alumni engagement and philanthropy
3. Sustain and grow a diversified and stable financial model
4. Implement best practices for board recruiting and leadership



Strategic Priority 1

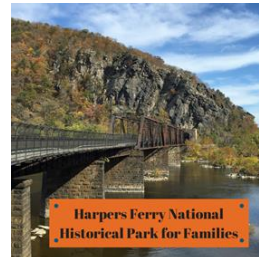
Create Opportunities to Engage Alumni With Each Other & Alma Mater

- In-Person & Virtual Programs
- Chapter & Regional Network Activities
- Diversity & Inclusion Initiatives
- Volunteer Leadership

Create Opportunities to Engage Alumni & Alma Mater



- Homecoming & Reunion Weekend
- Yule Log Celebrations
- Traditions Weekend
- Alumni Induction Ceremony
- Alumni Admissions



Create Opportunities to Engage Alumni & Alma Mater

ONE TRIBE.
ONE NETWORK.



- Online Networking Hours
- W&M Professionals Week
- Breakfast & Business Cards
- Webinars
- Workplace events – Tribe at Work



**W&M
Professionals
Week**

FEBRUARY 22-26, 2021

#onetribeonetwork



Create Opportunities to Engage Alumni & Alma Mater

Service Awards



Alumni Service Awards

Ben Boone '07, M.Ed. '09, Ph.D. '19
James '69 & Ronnee Taylor '69
Molly Lehner Wolff '98

Staff Service Award

Ann Marie Stock

Coach of the Year

Dane Fischer

Create Opportunities to Engage Alumni & Alma Mater



Robert "Bob" Trice Jr. '68



Susan "Sue" R. Warner '64

Alumni Medallion



[//wmalumni.com](http://wmalumni.com)



Sharon K. Philpott '85



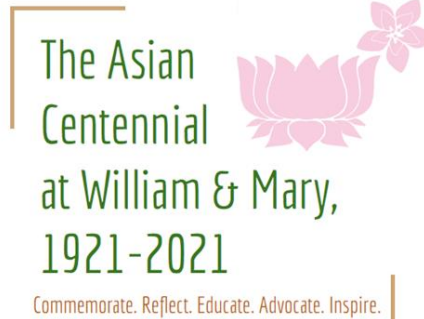
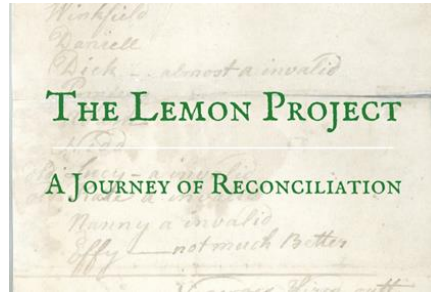
H. Elizabeth "Bee" McLeod '83

Strategic Priority 2

Promote Inclusive Culture of Engagement & Philanthropy

- Affinity Groups
 - Young Guarde
 - Olde Guarde
 - Association of 1775
 - Student Programming
- Diversity & Inclusion Initiatives
 - Alumnae Initiatives
 - HWA
 - Crim Dell Association
 - Latin X
 - APIM

Promote Inclusive Culture of Engagement & Philanthropy



Create Opportunities to Engage Alumni & Alma Mater

- 350+ Virtual/In-person Engagements
- 27,000 Alumni & Friends Engaged
- 17% Increase in Events
- 41% Increase in Ethnic Diversity
- 67% Increase in Registrations

Strategic Priority 3

Create a Strong Diversified Financial Model



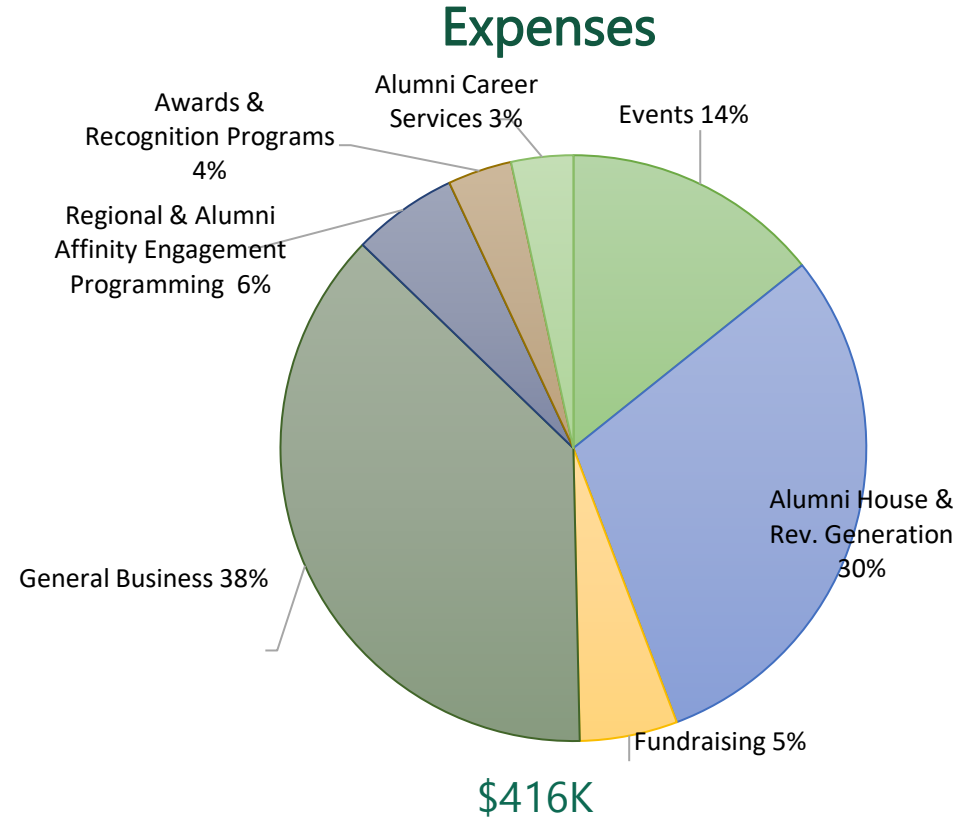
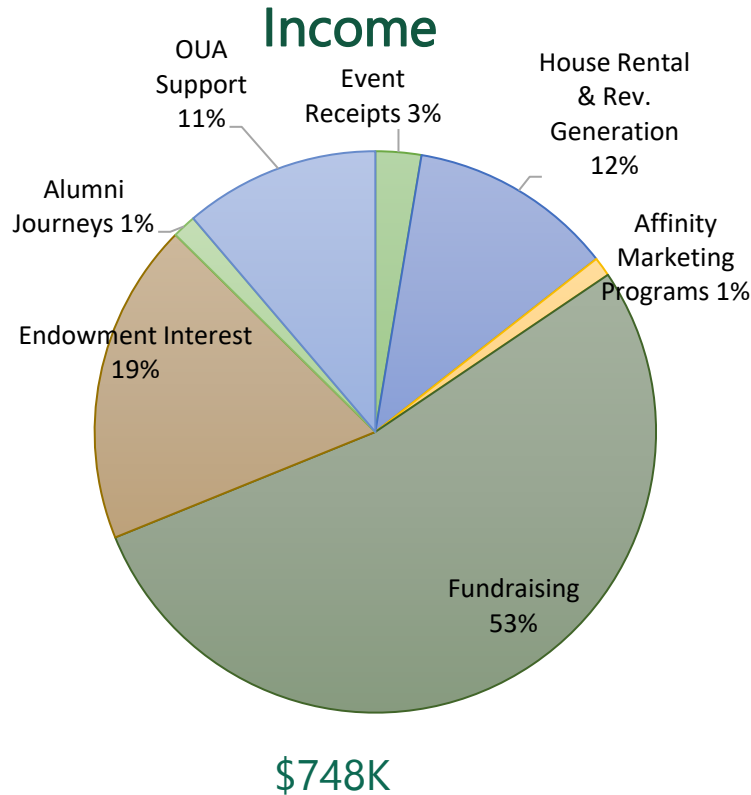
Statements of Position

June 30, 2021 and 2020

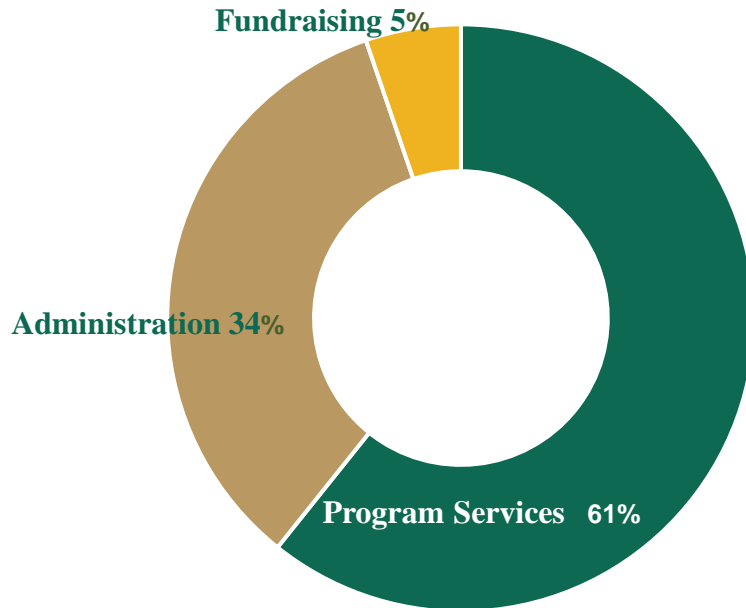
	2021	2020
ASSETS		
Cash and Cash Equivalents	\$ 820,965	\$ 483,939
Accounts Receivable	28,008	28,010
Pledges Receivable	93,582	243,634
Inventory	24,322	12,009
Prepaid Expenses and Deposits	11,610	25,036
Investments	12,462,235	9,373,331
Funds Held in Trust by Others	6,384,475	4,901,669
	19,825,197	15,067,635
Property and Equipment		
Furnishings	384,736	337,767
Leasehold improvements	378,914	378,914
	763,650	716,681
Less accumulated depreciation	(655,275)	(653,040)
	108,375	63,641
Total assets	\$ 19,933,572	15,131,276
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	\$ 73,031	65,473
Other liabilities	17,101	14,990
Due to University	-	179
Deferred income	35,539	29,423
Total liabilities	125,671	110,065
Net Assets		
Without donor restrictions	14,392,295	10,524,142
With donor restrictions	5,415,606	4,497,069
Total net assets	19,807,901	15,021,211
Total liabilities and net assets	\$ 19,933,572	15,131,276

Sources of Income & Expense

(FY21 Operations)



Functional Expense Ratio FY21 (501c3 Only)



Total Functional Expenses \$438,484

- Program Expense Ratio Guidelines

65-70% Meets Standard

70-90% Ideal

➤ 90% Excellent

- Administrative Expense Ratio Guidelines

15-30% Meets Standard

< 15% Excellent

- Fundraising Expense Ratio Guidelines

10-25% Meets Standard

< 10% Excellent

*Sources: Charities Review Council; Charity Navigator

Strategic Priority 4

Implement Best Practices for Board Recruiting and Leadership

- Board Pipeline
 - Demographic & Needs Analysis
 - Identify
 - Inform
 - Interest
 - Nominate
 - Balloting in January via Email and Magazine
- Board Development
 - Board Self-assessment and Evaluation
 - Governance Practices

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