

# University Budget Advisory Committee

## Minutes – 11/12/2020 meeting

Voting members present: Nabil Al-Tikriti (Chair, At-large)  
Stephen Davies (Secretary, At-large)  
Laura Bylenok (At-large)  
Liane Houghtalin (CAS)  
Kyle Schultz (COE)  
Suzanne Sumner (At-large)

Voting members absent: Chris Garcia (COB)

Non-voting members present: Patrick Catullo (Athletic Director)  
Michelle Pickham (Staff Advisory Council President)

Guests: Lisa Bowling (VP for Advancement, Alumni & Univ Relations)  
Mark Thaden (Exec Dir of Alumni Relations)  
Malcolm Holmes (Dir of University Marketing)  
Catherine Seller (Asst VP for Donor Relations and Operations)

1. The meeting was devoted to a series of presentations from Lisa Bowling (VP for Advancement, Alumni, & University Relations) and her reports Malcolm Holmes and Mark Thaden. Ms. Bowling's division had lots of information to share with the committee in terms of broader strategy.
2. Ms. Bowling began with some historical perspective. When she first arrived at UMW in late 2017, she was surprised at how "leanly resourced" this division was compared to other schools – she described it as having a "skeletal staff" today following more recent funding cuts since her arrival.
3. In 2018 Ms. Bowling and her colleagues created a 15-year plan. The Covid pandemic has obviously changed timelines, and in some cases, tactics. Nevertheless, the most important goals of the division remain these three:
  - Reputation management (primarily University Relations)
  - Relationship building (primarily Alumni Relations)
  - Revenue generation (primarily Advancement)
4. **University Relations.**
  - (a) Due to various institutional crises, UMW lost significant ground to competitors on the marketing front in the 2006-2020 period. The result is that an entire generation of students doesn't really know who we are! We desperately need to aggressively brand and market. Alarmingly, as Mr. Holmes reported, awareness of UMW drops precipitately outside of a 50-mile radius these days. The institution also didn't put any marketing dollars behind the 2004 name change (MWC → UMW), which also muddled our identity in the minds of the surrounding community.
  - (b) Much of the University Relations' energy and time revolves around issues management and "crisis communications," a mostly behind-the-scenes endeavor that nevertheless consumes many resources. This involves not only getting out in front of crises and controlling messaging to preserve UMW's reputation, but trying to anticipate such crises in the first place, in a variety of areas.
  - (c) Mr. Holmes has been at UMW since 2012, and heads up University Marketing. Remarkably,

only in 2017 did UMW finally get an actual dedicated marketing budget. Funding previous to this time was always ad hoc (via one-time disbursements from the President), which made it impossible to do long-range planning.

- (d) The Covid pandemic put our current long-term marketing brand work on hold. It should be rolled out next year instead.
- (e) UMW has a marketing budget that is considerably less than that of (at least some) institutions with which it competes for students. As an example, a few state schools have known figures here: UVA spends at least \$1.5 million annually on marketing, while Norfolk State and Radford spend over \$1 million. Ms. Bowling knows some private Virginia schools with only 1000-2000 students that have triple our marketing budget. (Oddly, there is much more known about how the marketing budgets of private institutions than public.)
- (f) Our current most important marketing priorities are to increase awareness and improve perception of UMW, and to increase our prospect pool in NOVA, Richmond, and Hampton Roads. Reaching potential out-of-state students is a high priority, but marketing dollars are too limited to do extensive multi-state targeting, so digital ads focus on select markets like Maryland.
- (g) Members of the committee asked about several specific marketing avenues, and whether they would be worthwhile in terms of cost/benefit:
  - Dr. Al-Tikriti observed that shopping malls seem to be “dying” in recent years, and Mr. Holmes confirmed that we are indeed abandoning all shopping mall ads in the immediate future.
  - The full-length posters advertising VCU, U Richmond, *etc.* at Richmond and Washington airports are unfortunately simply out of our price range.
  - Dr. Al-Tikriti inquired about advertising on NPR. Mr. Holmes explained that NPR requires “sponsorships,” not ad buys, which puts them at a different price point.
  - Dr. Sumner asked about billboard advertising. Mr. Holmes replied that it is difficult to measure the impact of this type of advertising, and that these days you get more “bang for your buck” with digital ads, which we are increasingly emphasizing.

## 5. Alumni Relations.

- (a) Mark Thaden explained that the Alumni Association is an independent 501(c)(3) with their own organizational structure. Only about 4% of the Alumni Association’s budget comes from the University; the rest is from private gifts, corporate partnerships, *etc.*
- (b) There are four full-time staff in the Alumni Association. They implement a variety of programs designed to promote continuing interest and activity among alumni. One particularly effective program (among several) has been the “Mary Talks” lecture series.
- (c) A new initiative is the promotion of “Affinity Groups.” These are based on alumni with some particular common interest or experience, rather than just being class-based. (“Class of 2010,” *e.g.*) Examples of affinity groups include those focused on particular professions, on specific extracurricular activities & interests, and on certain demographic groups (Black; Christian).
- (d) Mr. Thaden pointed out one silver lining of the Covid pandemic: we have learned that virtual gatherings (Zoom, *e.g.*) are an unexpectedly effective (and inexpensive) way of

implementing meaningful experiences for our alumni.

- (e) Mr. Thaden also presented several interesting demographic factoids about UMW alumni as a group, including:
- We have alumni in all fifty states, though they are concentrated on the eastern seaboard. 60% still live in Virginia.
  - Almost half of our alumni graduated in year 2000 or after, a fact which might change perceptions if more widely known.
  - About 75% of our alumni are female, but this is getting more balanced over time.

## 6. **Advancement.**

- (a) The Advancement division involves “the fund-raising itself.” Currently we have a very small fund-raising team.
- (b) The UMW endowment grew past \$50 million for the first time in 2018, which is of course good news, although it’s still pretty small for an institution our size. We have also seen a large recent increase in the number of donors, which is welcome and encouraging. Total giving as a whole has been increasing nicely over last three years, but the Covid pandemic unsurprisingly disrupted these gains. (When Ms. Bowling returns to address the committee in January 2021, she’ll focus her presentation on “Advancement in the light of Covid-19.”)
- (c) Fund-raising for the Athletics side of the house has moved around. It used to be housed in the Athletics Department, then it was moved to Ms. Bowling’s team, but since the position has recently gone unfilled, Mr. Catullo and Athletics has taken over those responsibilities once again (and are doing a great job).

Upcoming meetings:

- Nov 19th and 26th: off
- Dec 3rd: Jeff Roundtree (Mary Washington Foundation)