Volunteer Town Hall

Merritt Crowley | Vice President, Advancement
Courtney Shurtleff | Director, Alumni Relations

February 24, 2021
*For Volunteers only
Fundraising Progress

FY21 Fundraising Progress Against Goal as of February 23, 2021

<table>
<thead>
<tr>
<th>Projects</th>
<th>Dollars Raised</th>
<th>FY Goals</th>
<th>Deferred Pledges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endowment</td>
<td>$6,668,677</td>
<td>$3,000,000</td>
<td>$135,000.00</td>
</tr>
<tr>
<td>Wheaton Fund</td>
<td>$3,289,574</td>
<td>$5,000,000</td>
<td>$0.00</td>
</tr>
<tr>
<td>Facilities</td>
<td>$6,535,000</td>
<td>$8,000,000</td>
<td>$0.00</td>
</tr>
<tr>
<td>Faculty and Curriculum Support</td>
<td>$99,920</td>
<td>$1,500,000</td>
<td>$0.00</td>
</tr>
<tr>
<td>Student Leadership Support</td>
<td>$154,768</td>
<td>$500,000</td>
<td>$0.00</td>
</tr>
<tr>
<td>Other</td>
<td>$429,500</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$17,477,439</strong></td>
<td><strong>$18,000,000</strong></td>
<td><strong>$135,000</strong></td>
</tr>
</tbody>
</table>
Campaign launched on National Philanthropy Day, Sunday, November 15

- $500,000 in matching funds from six members of our community.

- 44 first time donors during the 45 day challenge compared to 72 in the 4.5 months before

- 1,086 Donors participated in the Abundantly Wheaton Challenge and NOT the Trustee Challenge

- 593 Upgrade / 317 Remained the Same / 136 Downgrade
Path to $5 Million by June 30th

- Honoring President Hanno
- Volunteer Outreach- Thank you!
- Phonathon Program achieved a new record this fall, raising $79,557 in cash and new commitments (FY18 was previous record: $56,837)
- Pay-it-Forward Campaign
- Virtual Reunion Programming
Stewardship

- Virtual Event—Investment and Impact: Your Philanthropy at Work (20 attendees, 11/11/20)
- 2021 Calendar mailed to 1000+ members of the Mary Lyon Leadership Society (12/12/20)
- Mid-Year Impact Report emailed to MLLS members (01/29/21)
- 56 Named Internship Fund Reports (10/05/20)
- 188 Endowed Fund Financial Reports (11/20/20)
- 125+ Named Scholarships Reports prepared for mail (300+ students will be featured when reporting concludes, generally by the end of March)
- 500+ personalized acknowledgement letters (242 between Dec. 1 and Jan. 31)
New Academic Center

Construction on the new campus innovation hub will resume in late spring of 2021, with occupancy slated for January 2022.

The 70,000-square-foot former Science Center will be fully renovated to house:

- Wheaton’s growing programs in social entrepreneurship
- Lab 213 (the campus’s principal makerspace)
- Filene Center for Academic Advising & Career Services
- The college’s two largest majors—Business & Management and Psychology.
- And a simulation lab will be incorporated for the Nursing B.S. program.

Fundraising for this capital project stands at $19 million toward a goal of $25 million by 06.31.21.
Strategic Growth Initiatives

- Generate revenue
- Build on strengths
- Expand services to current audiences
- Reach new student populations and growing markets
- Reflect opportunities to build synergies within & across new and existing initiatives
Athletics Catalyst Fund

- **$6,000,000** investment in athletic facilities and coaching staff
  Supports twenty-one varsity sports
  Strengthens recruitment efforts
  Helps maintain our excellent retention rate of student athletes.

- **$3,000,000** Challenge Gift
  Inspire alumni athletes to support an area of personal impact
  Opportunities to name endowed athletic funds and facilities

- **Design work has begun**
  Plans for Haas Athletic Center, Clark Recreation Center and research in the feasibility of an outdoor track could be ready mid-April.

- **Data Analytics**
  Analysis of prospects, their affinity, philanthropic history and capacity has helped us identify 245 prospective donors
Questions?
Presidential Search Committee

Chairs

Janet Lindholm Lebovitz ‘72
Chair, Presidential Search Committee
Chair, Wheaton Board of Trustees

Andrew D. Lounder ‘05
Vice Chair, Presidential Search Committee
Senior Director, Programming and Council Engagement Association of Governing Boards of Universities and Colleges

Committee:

Monique Lee Bahadur ’80
Gene Begin
Nancy Beth Carlson ’77
Richard Chait
Ryan A. Letada ’08
Professor Dipankar Maitra
Diane C. Nordin ’80
Chris B. Paquet ’03
Shaya Gregory Poku

Courtney Shurtleff
Sarah Simkevich ’22
Victor Trepanier ’22
Professor Winter Jade Werner
Elena Wong ’07
Professor Brenda Wyss
Presidential Search Listening Sessions

Listening Sessions:

Volunteer only session  
Monday, March 1st at 5:00 pm EST

All Alumni session  
Monday, March 1 at 11:00 am EST

Tuesday, March 2 at 6:00 pm EST

- Please direct your comments and suggestions, in confidence, to the Presidential Search Committee at presidentialsearch@wheatoncollege.edu.

- We would also appreciate nomination of potential candidates, which should be sent to our search firm at wheaton@russellreynolds.com.
Commencement Reunion Programming

State of Massachusetts restrictions:

Current meeting limits: On Feb. 8, the state increased capacity limits for restaurants, gyms and other businesses to 40 percent, up from 25 percent. Gathering restrictions remain the same, with events limited to 10 people indoors and 25 people outdoors. Anyone over the age of 5 must wear a mask in public.