



VMI ALUMNI AGENCIES  
ALUMNI ASSOCIATION • FOUNDATION • KEYDET CLUB

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CEO Update  
VMI Board of Visitors

May 2024

# VMI Foundation and Keydet Club Update

- **Overall Commitments:** \$18M
- **Donor Participation YTD:**
  - Overall donors are up 7%
  - Alumni donors are up 13%
  - Donor retention is up 4.9%
  - Alumni retention is up 8.4%
- **GOLD Society:** Launched in January 2024, with 101 young alumni members.
- **Day of Giving Success:** Achieved the goal of 500 donors by 11 am, closing the day with 1148 donors and over \$272K in donations (85.5% of which are alumni). Highlighted the classes of 1991 and 1993, whose years will appear on Moe's jersey.
- **Call to Duty Scholarships** – Understanding the importance of this initiative, we have raised \$1.4M.

- **Institute Society – 50<sup>th</sup> Year Celebration.**
  - Celebrated in a two-day event Nov. 8-9, 2024.
  - There will be a VIP cocktail hour to meet the nationally recognized speaker, a member's cocktail time under a banquet tent, a band, and an after party.
  - All are encouraged to donate so you can join us at this memorable event.
- **Jackson Hope and Peay Cabinet** – the Foundation continues to support this ongoing and important work to support VMI and the cadets.
- **Reunions 10/25/50** - are first class events with **a focus on camaraderie and philanthropy**. The work begins two or more years in advance of the date. Careful planning pays off in that ¼ of our giving comes from reunion gifts annually.
- **Compete to Win** – Ramping up for this event for giving days May 7-9, 2024. This is a vital part of our fundraising, focusing on team operational needs. We are looking forward to Board support with this fundraising effort.

# Alumni Association

- **Affinity Reunions** – Alumni gatherings based on interest and experience vs. class year. On top of everything else they do, the Keydet Club has established a rhythm with their Affinity Reunions. This year, we hosted a Band Reunion of more than 280 registered attendees, one of the largest affinity reunion in VMI history.
- VMIAA hosted a successful launch of its **first remote voting process** at its annual meeting of its members. The full slate was elected by a large margin.
- VMIAA continues to work through the **alumni survey**, bringing clarity to some of the feedback we received through a series of Alumni Review and Turnouts articles.

## Performance Summary (NOF)

Account/Group	Ending Market Value USD	Ending Weight	Policy Weight	% Rate of Return							
				One Month	Year to Date	Fiscal YTD	Three Years	Five Years	Ten Years	Inception to Date	Inception Date
<b>Total US Equity</b>	235,676,794	30.92	27.00	3.24	10.00	19.43	9.85	14.35	12.29	14.39	06/30/2009
<i>Russell 3000</i>				3.23	10.02	19.29	9.78	14.34	12.33	14.51	06/30/2009
<b>Non-US Equity</b>	68,136,480	8.94	10.00	3.34	5.86	11.77	4.93	7.67	4.72	7.26	06/30/2009
<i>MSCI EAFE ND</i>				3.29	5.78	12.01	4.78	7.33	4.80	6.90	06/30/2009
<b>Non-US Equity Emerging Markets</b>	51,345,170	6.74	10.00	2.32	2.18	6.56	-7.22	-0.62	0.67	2.97	06/30/2009
<i>MSCI Emerging Markets ND</i>				2.48	2.37	7.19	-5.05	2.22	2.95	4.64	06/30/2009
<b>Fixed Income</b>	84,327,323	11.06	10.00	1.48	0.69	8.80	1.04	3.80	3.81	5.21	06/30/2009
<i>BBG US Aggregate</i>				0.92	-0.78	2.56	-2.46	0.36	1.54	2.54	06/30/2009
<b>Cash</b>	7,908,989	1.04	1.00	0.49	1.35	4.03	2.85	2.07	1.63	1.49	06/30/2009
<b>Public REIT</b>	23,100,655	3.03	3.00	1.94	-1.16	6.83	1.77	3.84	6.28	9.75	10/31/2009
<i>MSCI US IMI Real Estate 25-50</i>				1.75	-1.41	5.96	0.79	2.74	-	-	10/31/2009
<b>Absolute Return</b>	35,665,544	4.68	5.00	1.08	2.83	7.77	9.06	8.43	5.56	5.84	06/30/2009
<i>HFRI Fund of Funds Composites</i>				1.34	3.93	7.77	2.80	4.95	3.56	3.75	06/30/2009
<b>Private Investments</b>	256,105,809	33.60	34.00	1.20	2.36	4.97	12.10	13.98	13.27	12.04	10/31/2009
<b>VMI Foundation Total</b>	762,266,764	100.00	100.00	2.11	4.54	10.22	6.73	9.46	7.31	8.58	06/30/2009
<i>VMI Custom Benchmark</i>				1.66	3.60	8.01	6.04	9.55	7.67	8.66	06/30/2009

# Communications and Marketing

Promoting the good news stories and defining the value of a VMI education.

- **Marketing** – They are wrapping up an aggressive **18-month multi-channel marketing campaign**, focusing on getting good news stories to the alumni base (primary audience) and supporting admissions recruiting by reaching households with young people going through the college search process.
- No stone left unturned:
  - Home page of the Richmond Times Dispatch
  - Full-page Sunday Paper ads
  - YouTube and social media
  - Airport ads
  - 10 billboards round Richmond, noticed by the secretary of education
  - End of year Social Media Advertisements

# Advancement Services, Financial Services, Human Resources

- **Advancement Services Team** – This spring the team hosted the Volunteer Leadership Conference, Spring Reunions which welcomed back nine classes, and the VMI Foundation scholarship banquet – all a big success.
- **Human Resources** – Provides critical support for employees and agencies. Since the re-organization we worked to create consistent policies and procedures across the Agencies, and supports our benefits program and hiring practices
- **Financial Services** – This team assures our financial adherence to policies and procedures, budgeting and data base support, financial reporting for all boards, and the annual audit by a national accounting firm.

# VMI Partnerships

While we are separate entities, each with our own mission, we work collaboratively with the Institute to strengthen our respective purposes.

- **VMI Strategic Plan divisional committees** – we have representatives for each of the five working groups.
- **Staff or Alumni Representatives on Initiatives**
  - **Commandant search**
  - **Director of Communications and Marketing Search**
  - **Athletic Director search**
  - **NCAA Athletics Task Force**
- **New Alumni Center planning and process.**



**Thank you!**

**Questions?**