

# Services Guide and Annual Report 2005



Office of External Affairs



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**UNIVERSITY OF MARYLAND**  
Office of External Affairs

September 2005

Dear University of Maryland Community:

It is with great pleasure that we present the Office of External Affairs (OEA) *Services Guide and Annual Report*, describing its services and key accomplishments for Fiscal Year 2005. Each year, OEA works enthusiastically to further the University's mission and promote our research, scholarship, and services to key audiences.

As we work to make the most of shrinking resources, it is important that you are aware of the services available to you through OEA. The pages that follow describe activities that support the goals of the University through: communications, development, resource management, the University of Maryland Baltimore Foundation, Inc., and government and community affairs.

In FY05, we made important strides. Thanks to alumni and friends, facilitated by campus leadership and talented development and resource management staff, the University celebrated its most successful fundraising year ever with contributions totaling nearly \$53 million. The government and community affairs office led the campus to successful legislative outcomes and assisted with facilitating positive relations with our surrounding communities as we prepare to open the new UMB BioPark. The communications team placed campus experts on national and local print, radio, television, and Web programs a total of 2,249 times; at the same time, they produced 133 creative publications and projects. The University of Maryland Baltimore Foundation, Inc. provided more than 16,000 accounting, fundraising, and informational reports to our schools.

It has been a productive year and we very much look forward to building on our successes and meeting new challenges in FY06. We welcome your feedback and suggestions.

Sincerely,

A handwritten signature in black ink, appearing to read "David J. Ramsay".

David J. Ramsay, DM, DPhil  
*President*

A handwritten signature in black ink, appearing to read "T. Sue Gladhill".

T. Sue Gladhill, MSW  
*Vice President for External Affairs*

# OEACOMMUNICATIONS

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(410) 706-7820 [www.oea.umaryland.edu/communications/pubs](http://www.oea.umaryland.edu/communications/pubs)

## OVERVIEW

The Office of Communications provides editorial, design, media relations, and Web development services to the campus community; supports crisis communications efforts; and is responsible for the University's home page on the Web.

## SERVICES

### Publication Services

- Writes, edits, designs, and manages print publications (from concept to completion), including student recruitment pieces, viewbooks, alumni magazines, brochures, catalogs, advertisements, and a range of collateral materials to support schools and UMB programs and events, including Commencement, Founders Week, and Martin Luther King, Jr. Day and Black History Month
- Writes, edits, and manages production of *Maryland* magazine, the University's research and scholarship publication
- Writes, edits, and manages production of the monthly campus newspaper, the *VOICE*
- Ensures appropriate use of University brand identity and logo and use of OEA style guide
- Provides the University seal and colors in a variety of formats (e.g., print and online)
- Maintains and updates the University map in a variety of formats (e.g., print and online)
- Maintains pool of freelance photographers, writers, and designers
- Maintains archives of publications, slides, and photos
- Publishes phone directory jointly with the University of Maryland Medical Center

### Media Relations Services

- Manages and supports media relations efforts for the University
- Coordinates media relations during campus crisis situations
- Provides strategic planning for media events
- Writes and posts Web stories about all schools and programs
- Assists in writing and placing opinion editorials
- Provides media training to faculty, staff, and students
- Distributes daily electronic record of news appearances—*In The News*
- Maintains videos of appearances on news broadcasts
- Creates videos that highlight press coverage, events, etc.
- Supports faculty projects and research that require media coordination or training

### Web Development Services

- Manages design, content, and navigation for the University's home page
- Provides design, content, and functional strategy insight to school and unit sites to improve user experience
- Maintains and improves the giving site for fundraising purposes

## ACCOMPLISHMENTS

### Publications Highlights:

Produced 133 projects for 50 clients in FY04

- General
  - Produced *Maryland* magazine
    - Best Magazine Award
    - Public Relations Society of America (Maryland chapter) Best in Maryland Awards
    - Best Public Service Article
    - Honorable Mention
    - Magnum Opus Awards
    - “YANA Takes Social Work to the Streets”
    - Best Use of Illustration
    - Honorable Mention
    - Magnum Opus Awards
    - “Healthy Smiles from a Precious Metal”
- Dental School
  - Produced *Mdental* magazine
    - Division 1 Silver Scroll Award
    - International College of Dentists
    - Best Use of Illustration
    - Honorable Mention
    - Magnum Opus Awards
    - “Healthy Smiles from a Precious Metal”
- School of Medicine
  - Produced *Get Fit Maryland* publications and trail map for walking tour
  - Designed and edited *Proficio* magazine (fall) and PTRS newsletter (spring) for Department of Physical Therapy & Rehabilitation Science
- School of Nursing
  - Edited *Pulse* magazine
  - Edited research magazine
  - Created informatics conference program
- UMB
  - Produced Commencement program
  - Created Founders Week Web site and sponsorship component
- Development
  - Provided design and editorial support for variety of fundraising collateral materials
  - Created letterhead system for Annual Fund appeal
- Office of Research and Development
  - Developed UMB BioPark marketing materials

### Media Relations

SUMMARY ANALYSIS	FY05
<b>TOTAL PLACEMENTS</b>	<b>2249</b>
PRINT PLACEMENTS	1788
RADIO PLACEMENTS	94
TELEVISION PLACEMENTS	1882
WEB NEWS PLACEMENTS	134
Dental School	54
School of Law	864
School of Medicine	918*
School of Nursing	66
School of Pharmacy	126
School of Social Work	192
Other Campus Stories	111

\* SOM has its own media relations team.

### Web Development

- Partnered with CITS to redesign and update the University home page, which will launch in the second quarter of FY06
- Developed Web pages in the new content management system, which simplified and streamlined information updates, access, and formatting
- Worked with Resource Management to establish a new giving procedure that allows online credit card validation. Donors and registrants receive instant payment approval and a receipt via e-mail.
- Developed database for Community Affairs programs that shows programs by school and region. Program administrators were given the ability to update information directly.
- Built a news release database application that tracks local media coverage of University faculty, staff, and students
- Created regional maps that give a more detailed view of the campus and make it possible to sort the index of campus locations alphabetically or numerically

# OEADEVELOPMENT AND ALUMNI RELATIONS

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(410) 706-8495 [www.oea.umaryland.edu/giving](http://www.oea.umaryland.edu/giving)

## OVERVIEW

The division of Development and Alumni Relations creates and implements a comprehensive and integrated model for development and alumni relations at UMB. With expertise and focus on the campuswide enterprise, OEA Development and Alumni Relations builds capacity and efficiency through strategic planning and core services. In consultation with unit development staff and within the context of the annual campus fundraising goal, this division sets expectations for performance and productivity outcomes.

## SERVICES

### Strategic Development Planning

- **Strategic Planning:** Provides expert counsel and resources to the President's Office, deans, and unit development officers for long-range strategic planning, project-specific goal setting, and implementation plans and timelines. Evaluates fundraising industry trends and identifies best practices to provide effective counsel to institutional leadership regarding development strategies
- **Principal Gift Development:** Seeks and identifies principal gift prospects (\$1M gifts and above) and designs creative strategies using a donor-centered approach

### Planned Giving

- **Planned Giving Expertise and Counsel:** Offers counsel, guidance, and training to major gift officers in all aspects of planned giving. Assists major gift officers with the establishment of prospect strategies, preparation of technical documents, planned giving proposals, and illustrations for complex gift arrangements. Accompanies major gift officers to appointments with prospects and their financial and legal advisors to facilitate the appropriate planned gift for each individual prospect
- **Stewardship and Marketing Strategies:** Collaborates with unit development program officers to create strategies to effectively utilize Legacy Councils to steward planned giving donors and to market planned giving opportunities to alumni and friends
- **Administration:** Establishes policies and procedures for the solicitation and acceptance of planned gifts in collaboration with the offices of Gift Administration and Resource Management. Oversees the administration of estate gifts managed by the University of Maryland Baltimore Foundation, Inc. (UMBF, Inc.) and Mercantile Bank & Trust, collaborates with the University System of Maryland Foundation, Inc. (USMF, Inc.), the Common Trust, the Trustees of the Endowment, the Medical Alumni Association, the Dental Alumni Association, and other affiliated or unaffiliated foundations and entities that accept bequests on behalf of the schools and programs of UMB to ensure funds are deposited in accordance with the planned giving instruments and with the donors' wishes

### Regional Development

- Identifies, cultivates, and solicits alumni major gift prospects who reside outside the Baltimore/Washington area for each of the University's professional schools

### Annual Giving and Alumni Programs

- Leads in the design, strategy, and implementation of solicitations, mailings, phone programs, and events that develop advocates for philanthropy within the organization to ensure the institution's long-term success
- Develops programs to enhance alumni cultivation, solicitation, recognition, and stewardship

### Corporate and Foundation Relations

- Represents the teaching, research, and service missions of the University through strategic cultivation, solicitation, and stewardship of corporations and foundations at the local, regional, national, and international level, with the objective of maximizing investment in the University of Maryland, Baltimore
- Responds to the needs and interests of industry and facilitates mutually beneficial collaborations, partnerships, and sponsorships in areas such as faculty research, technology development and transfer, economic development, and continuing education
- Advises and supports the president, deans, and chief development officers in creating and maintaining strategic relationships with corporate leaders and in identifying and facilitating fundraising strategies
- Works with schools and units to: identify possible funding sources through research, RFPs, and grant opportunities; meets with principal investigators and staff to discuss proposal strategies and timelines; briefs and accompanies faculty on visits with prospects; reviews drafts to ensure that proposals accurately reflect the similarity between the needs and interests of the University and corporation or foundation

### Prospect Research

- **Prospect Profiling and Screening:** Researches and provides written individual, corporate, and foundation prospect profiles for major gift officers, as well as conducts proactive searches for potential funding sources; manages electronic screening of prospects
- **Data Integrity and Management Services:** Manages myriad prospect information maintenance services in BSR/Advance (the development database) to ensure data integrity
- **Prospect Management and Tracking:** Monitors prospect activity and database usage to advise schools and unit development program officers as appropriate

### Special Events

- **Development Events:** Coordinates and implements events providing opportunities for the schools and departments to cultivate major gift prospects and steward donors
- **Campuswide Event Management:** Plans, coordinates, and manages all major campuswide events and commemoration activities for the President's Office, including Commencement, Black History Month, Women's History Month, and Founders Week
- **Special Event Expertise and Guidelines:** Provides special event management and guidance, upon request, to the President's Office, Office of External Affairs, and to individual schools and units for stewardship functions, groundbreakings, and building dedications

- **Meeting Space Management:** Coordinates and manages use of the Gladhill Board Room for schools and departments. Provides advice in the use of other meeting space on campus
- **UMBF and Government Affairs:** Assists in planning and implementing UMBF, Inc. Board of Trustee and government affairs related events

## ACCOMPLISHMENTS

### General

- Provided interim managerial support for the school-based development programs in transition: Dental School and School of Pharmacy
- Recruited executive director of development and alumni relations for School of Pharmacy; inaugurated and filled position of director of regional development; re-established and hired director of corporate relations; and assumed provisional leadership for Dental School
- Implemented framework for capital campaign planning

### Planned Giving

- Worked on cultivation strategies and solicitation of more than 100 planned giving prospects for all schools and programs of the University of Maryland, Baltimore
- Secured more than \$300,000 in charitable gift annuities
- Conducted joint visits to planned giving prospects with major gift officers
- Documented more than \$1.75 million in new pledge bequests
- Received more than \$5 million in realized bequests
- Developed a comprehensive and interactive planned giving Web site that

- integrates with the sites for each school
- Created method for tracking planned giving activity in the existing BSR/Advance database
- Worked with law, dental, and pharmacy schools to identify Legacy Council spokesperson who has personally established a planned gift, and to develop comprehensive stewardship, marketing, and advertising plans for each school
- Prepared over 40 technical illustrations and proposals for planned giving prospects

### Regional Development Accomplishments

- Integrated regional prospect activity into an overall major gifts strategy using the P!N Echelon ratings and geographic analysis of prospect base
- Gained firsthand knowledge of the giving potential and readiness of prospective donors and developed appropriate strategies
- Collaborated with major gift officers to ensure seamless handling of each prospect
- Made 51 personal visits in 6 months resulting in identification of 55 alumni as major gift prospects (some alumni were identified based on other communications). One contact resulted in a gift of \$100,000. Fifteen alumni visited said that UMB was either in their estate plan, or

that they would consider including UMB in their estate plans.

- Created 287 new contact reports in BSR since January 2005 to document regional development activity

### Annual Giving

- Raised more than \$1 million in annual fund gifts
- Established definition of “annual fund” and gift designations within each fund for five schools, allowing for consistent and meaningful reporting of results
- Designed and implemented a comprehensive direct mail campaign for five schools
- Increased pledge fulfillment rate
- Acquired new donors for all schools participating in program
- Defined benchmark participation rates and goals
- Crafted messages that articulate and celebrate the mission, programs, and priorities of the professional schools
- Designed and implemented a series of alumni and student profiles
- Developed and implemented segmentation and testing of mailings
- Created 20 desktop reports on BSR to track and analyze annual fund results
- Directed annual giving staffs at five schools to utilize consistent annual fund reports and educated staff as to the use and distribution of such reports
- Incorporated strategy and goals for major gifts into annual fund solicitations
- Worked with OEA staff and development officers to create “best practice” model of development

### Corporate and Foundation Relations

- Created strategic framework for first, comprehensive, universitywide corporate relations plan
- Held series of meetings with key stakeholders to gain insights regarding

fundraising priorities, expectations, and concerns

- Researched and met with representatives from peer institutions to understand their programs’ strengths, weaknesses, organizational processes, and procedures
- Drafted mission, management guidelines, and processes to maximize Corporate Relations Office
- Researched and developed a “brand position” white paper outlining a communication plan and establishing a brand identity
- Met with the schools’ chief development officers and development staff to discuss their strategic plan, goals, administrative organization, and priority initiatives suitable for funding
- Established a portfolio of 75 to 100 viable corporate prospects for each school
- Devised a database tracking system that identifies, qualifies, and monitors prospect relationships and results
- Produced a Founders Week corporate sponsorship package that included direct marketing, e-mail, collateral materials, and an interactive Web site which was sent to more than 120 corporate prospects

### Prospect Research

- **Implementation of P!N Database**  
In conjunction with Computer Support Services, supervised the rollout of the Prospect Information Network (P!N) database and software to schools and units; coordinated the training of frontline fundraisers on the P!N software; developed and provided school and unit reports and prospect lists from the screening
- **BSR Tracking Module-Maintenance**  
With the implementation of the BSR Prospect Tracking module, created and managed prospects for the schools and units; created 900 new primary prospect entities and assignments on the tracking module for all schools and units

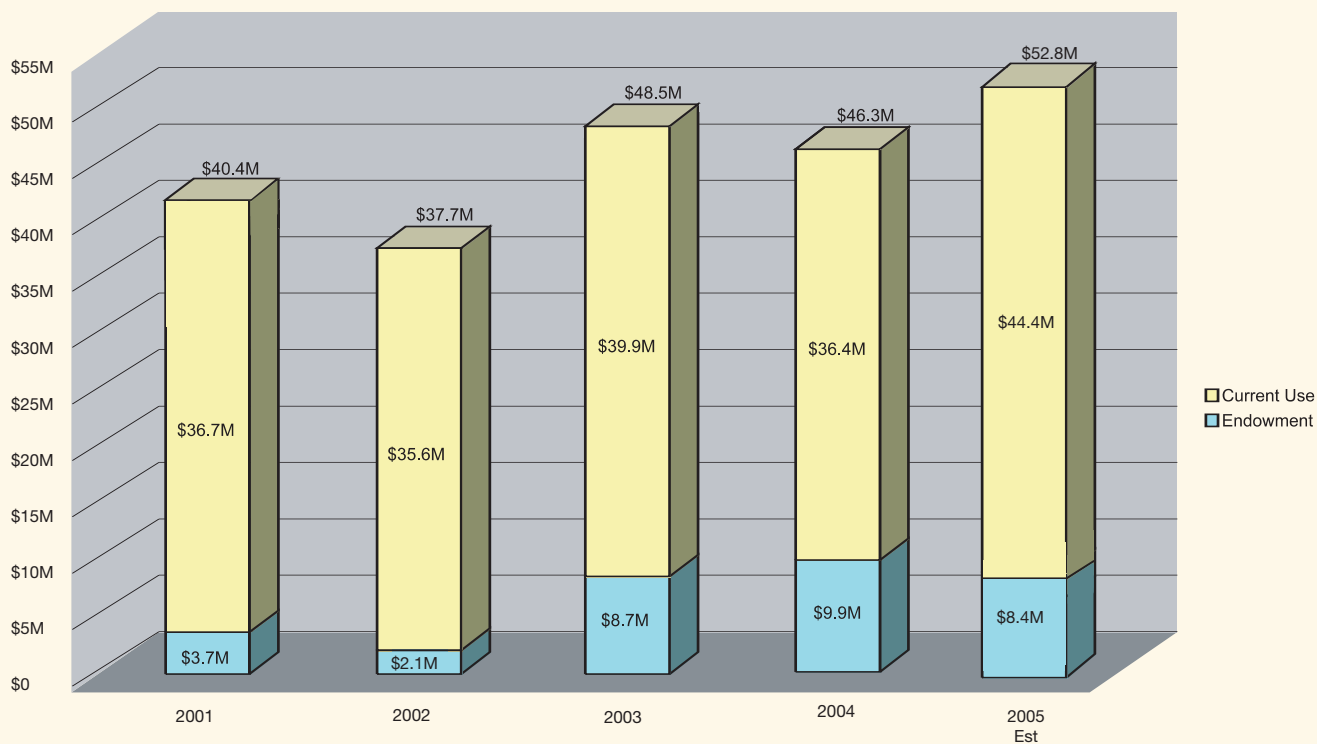
- **BSR Maintenance**

Effectively maintained BSR database; updated and researched returned mail from *Maryland* magazine mailings, and assisted the following schools with their returned mail: dental, pharmacy, law, and medicine; added 4,872 “lost” alumni to BSR, representing 8 percent of the total alumni database

- **Basic Research Services**

Completed 330 profile reports and six funding searches for the schools of medicine and social work; processed 16 reports from the PIN database; and performed 42 requests for basic research for the schools and units during FY2005; created more than 400 new entities for the BSR database.

## Total Fundraising Endowment vs. Current Use



## OEARESOURCE MANAGEMENT

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(410) 706-2949 [www.oea.umaryland.edu/resource](http://www.oea.umaryland.edu/resource)

### OVERVIEW

The Office of Resource Management provides collection, disbursement, and audit of private funds through the University of Maryland Baltimore Foundation, Inc., (UMBF, Inc.), and maintains a database of donors, alumni, and friends. The office also acts as the administrative entity managing human resources, payroll, and the operating budget for OEA.

### SERVICES

#### Gift Administration

- Gift Processing and Reporting
  - Provides document review and approval for all gifts
  - Processes gifts and pledges to UMBF, Inc., the University System of Maryland Foundation, Inc. (USMF, Inc.), Common Trust Fund, University Accounts, and Trustees of the Endowment
  - Generates gift receipts for donors' tax records
  - Provides monthly reports of fundraising results
  - Creates new account agreements
  - Processes in-kind gifts, including securities
  
- Endowment Gift Management
  - In collaboration with development officers and donors, prepares memoranda of understanding to establish new endowments
  - Maintains endowment database
  - Reviews and tracks grant applications to 501(c) 3 organizations (following approval by the Office of Research and Development)

#### Computer Support

- BSR Donor Database Support
  - Provides individual training to users in different areas, including biographical and gift maintenance, prospect management, and general overview
  - Installs BSR software on individual PCs
  - Loads graduate information from the Registrar's Office and other information from electronic sources, such as address updates and demographic information
  - Maintains BSR systems, including monitoring system performance, backing up system, maintaining security, upgrading hardware as necessary, and installing updates to the BSR software
  - Provides prompt reporting of BSR information in print and electronic forms to users as requested, including fundraising and/or donor reports
  - Maintains Intranet Web site, [oeaservice.umaryland.edu](http://oeaservice.umaryland.edu), which provides users with forms, contact information, address change Web page, and research link

- Completes annual *Council for Aid to Education Voluntary Support for Education* report
- Enhances accuracy of donor addresses through the use of the Alumnifinder system
- Maintains Intranet Web site
  - Provides information about Office of Resource Management
  - Provides access to forms necessary for foundation account operations
  - Provides up-to-date information on the status of development data projects (e.g., graduate uploads)
- Blackbaud Financial Edge Fund Accounting System
  - Installs software and hardware updates
  - Maintains security settings
  - Provides disaster recovery planning and testing

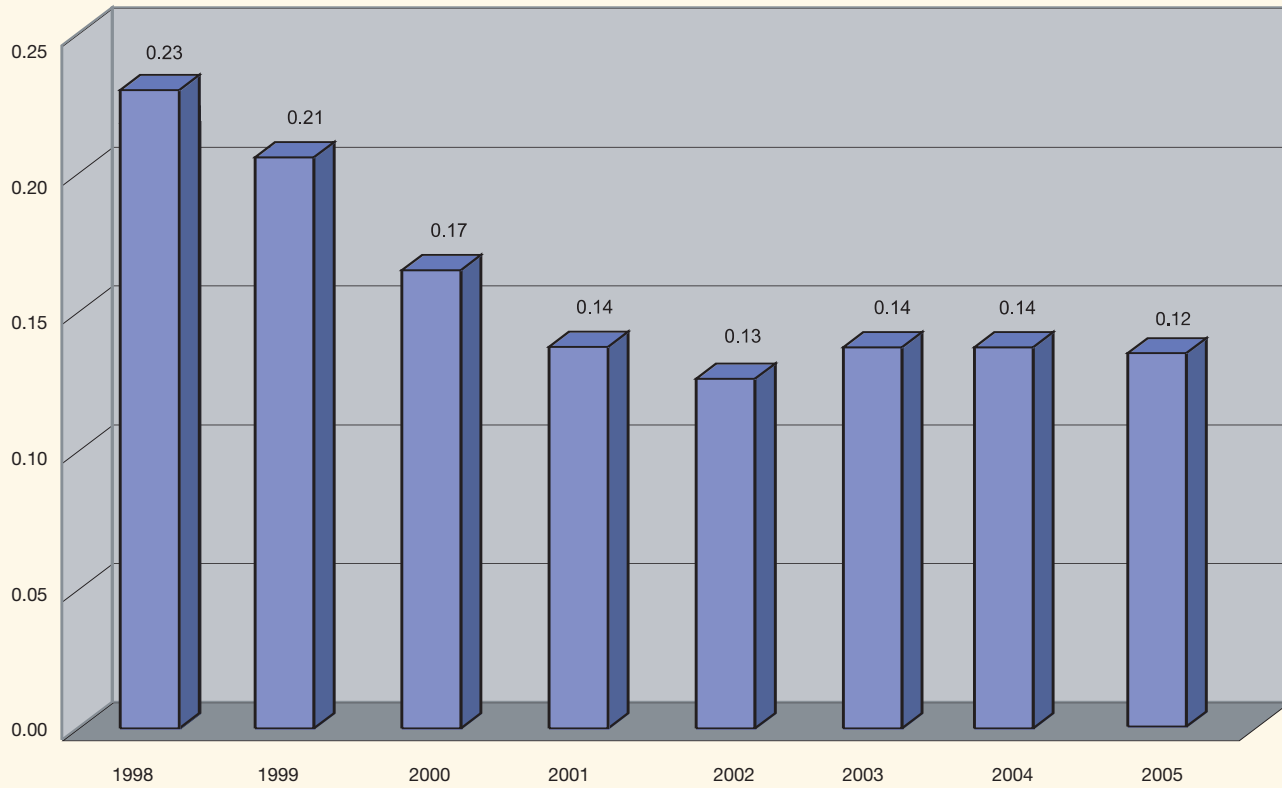
### **Financial Administration for the University of Maryland Baltimore Foundation, Inc.**

- Current Use (Operating) and Endowment Funds
  - Processes disbursement requests on a weekly basis
  - Computes and records annual spendable income distribution
  - Provides financial officers and development officers with reports of market value and spendable income for endowments
  - Manages planned gift investments (trusts and annuities)
  - Processes contracts with vendors supporting foundation and school activities
  - Manages grant revenue and expenditures and reporting in accordance with prescribed schedules established in the grant agreement
  - Coordinates investment management of Current use and Endowed funds with USMF, Inc.
  - Produces annual cost-of-fundraising analysis showing Development and Alumni Relations costs incurred to generate each dollar raised
  - Produces and distributes monthly financial reports to the schools for each foundation account and additional reports as requested
  - Provides regularly updated information to account holders and administrators through memos, formal and informal meetings, and training sessions
- Compliance Requirements
  - IRS tax filings and tax status requirements
  - USM BOR-Affiliated Foundation compliance
  - PricewaterhouseCoopers audited financial statements
  - American Express Tax and Business Services internal control audits
  - State of Maryland registration and compliance

## ACCOMPLISHMENTS

- Completed 14,016 gift transactions to support the \$52.8 million raised by the campus schools and programs in FY05. The average gift transaction was \$3,767. In FY04, the value per average transaction was \$2,596—evidence that UMB's development programs are moving in a positive direction.
- Defined new purpose codes and added these to each account description. This enhancement will allow us to generate campaign and fundraising reports that are based on the purpose of the gift, i.e., determine funds raised for unrestricted use versus scholarships or professorships.
- Negotiated new funds transfer agreement with USMF, Inc. Under the terms of the new funds transfer agreement, the criteria for transferring endowments have been eased, providing increased flexibility to move endowed funds to UMBF, Inc. administration.
- Worked with the unit development offices to establish the memoranda of understanding and accounting mechanisms necessary to create 20 new endowments
- Calculated spendable income and provided endowment spendable income reports to schools during the year to encourage spending of funds
- Conducted more than 50 orientation sessions for campus staff on gift administration, foundation procedures, and BSR database training
- Audited multi-year pledges and reviewed them with the schools' development offices
- Prepared the annual cost-of-fundraising report for each school and unit, and compiled the figures in a campus report for the University System of Maryland Board of Regents
- Provided more than 16,000 accounting, fundraising, and informational reports to the schools and units
- Completed more than 827 computer support projects, which included reports, training, database cleanup, and direct technical support
- Completely tested and revised disaster recovery planning to adapt to changing technologies and user expectations. Disaster plans for all critical systems were fully tested and restoration priorities established. The disaster plan was reviewed with the independent auditor to ensure best practices for development systems.
- Upgraded the BSR Advance development information system to take advantage of software enhancements; significantly increased the number and types of reports users can run from their desktop computers
- Installed and provided access to the PIN (Prospect Information Network)

## Cost of Fundraising



*This productivity measure identifies the cost (in cents) for the campus to raise \$1 in private support.*

# **OEA**UNIVERSITY OF MARYLAND BALTIMORE FOUNDATION, INC.

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(410) 706-2949 [www.oea.umaryland.edu/umbf](http://www.oea.umaryland.edu/umbf)

## OVERVIEW

The University of Maryland Baltimore Foundation, Inc. (UMBF, Inc.) advises the president of the University of Maryland, Baltimore on matters affecting UMB's campus, programs, students, faculty, employees, and the community it serves. UMBF, Inc. promotes UMB through advocacy and by enlisting financial support, and manages and invests gifts and property for the benefit of UMB.

## BOARD OF TRUSTEES

2005

**Richard J. Himelfarb, Chairman**  
Senior Executive Vice President  
Legg Mason, Inc.

**Charles L. Abbott**  
President, Trigen Energy Baltimore

**Edward J. Brody**  
CEO, Brody Transportation Co., Inc.

**Don-N. Brotman, DDS**  
Retired General Dentist

**Francis B. Burch, Jr.**  
Joint CEO DLA  
Piper Rudnick Gray Cary US LLP

**Daryl A. Chamblee**  
Partner, Steptoe & Johnson LLP

**Harold E. Chappellear**  
President  
UPM Pharmaceuticals, Inc.

**Anna M. Dopkin**  
Portfolio Manager  
T. Rowe Price Associates, Inc.

**James D'Orta, MD**  
Founder, LifeLinkMD, Inc.

**James A. Earl, PhD**  
President, Helena Foundation

**Morton P. Fisher, Jr.**  
Partner, Baltimore Office  
Ballard Spahr

**Sylvan Frieman, MD**  
Associate Clinical Professor  
School of Medicine

**Joseph R. Hardiman**  
Retired—President/CEO, National  
Association of Securities Dealers  
and the NASDAQ Stock Market, Inc.

**David Hillman**  
CEO, Southern Management Corp.

**Wallace J. Hoff**  
Retired—Vice President/General  
Manager, Northrop Grumman  
Aerospace Systems Division

**Donald M. Kirson**  
Retired—President/CEO Kirson  
Medical Equipment Co.

**Sally Michel**  
Baltimore City activist and founder  
of SuperKids Camp

**Milton H. Miller, Sr.**  
Retired—Founder, Miller Corporate  
Real Estate

**John A. Moag**  
Founder, Moag and Company

**Joseph A. Oddis**  
Vice President Emeritus,  
American Society of Health  
System Pharmacists

**Thomas P. O'Neill**  
Managing Director, American  
Express Tax & Business Services

**David S. Oros**  
Chairman/CEO, Aether Systems, Inc.

**Theo C. Rodgers**  
President, A & R Development

**Donald E. Roland**  
President and CEO, Vertis

**Pauline Schneider, JD**  
Partner, Hunton and Williams

**Alan Silverstone**  
Consultant, MedTactics

**Frederick G. Smith, DDS**  
Vice President  
Sinclair Broadcast Group

**C. William Struever**  
President, Struever Bros., Eccles  
and Rouse

**John C. Weiss, III**  
Chairman/CEO, Claragen, Inc.  
Executive Director, Entrepreneurship  
Program, University of Baltimore

**Garland O. Williamson**  
CEO/President, Information Control  
Systems Corp.

*EX-OFFICIO MEMBERS*  
**David J. Ramsay, DM, DPhil** (non-voting)  
President, University of Maryland

**T. Sue Gladhill, MSW, LCSW**  
President/CEO, UMB Foundation, Inc.

**Judith S. Blackburn, PhD, MBA**  
Treasurer/CFO, UMB Foundation, Inc.

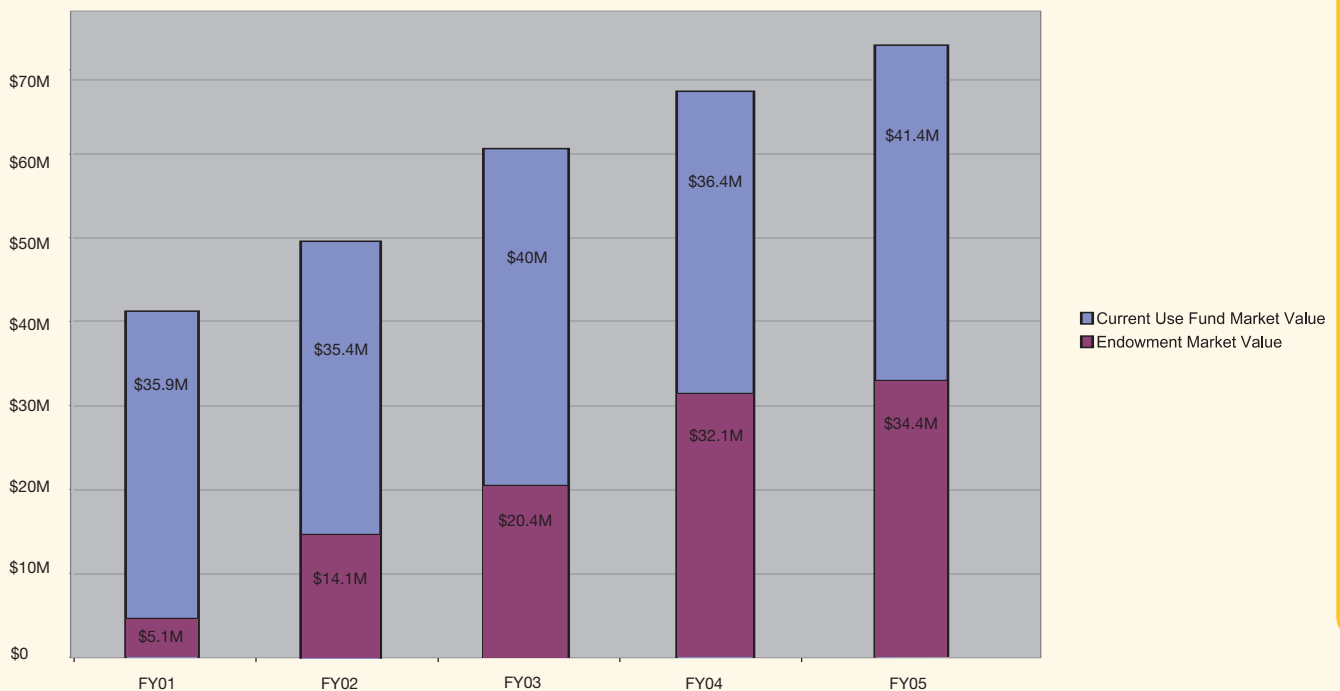
### STAFF

**Mary A. Nichols**  
Assistant to the President  
UMB Foundation, Inc.

## ACCOMPLISHMENTS

- The UMBF, Inc. board of trustees, 30 influential and committed leaders who are dedicated to advancing the goals of UMB, met three times during the year. The trustees, who are invaluable advisors to President David J. Ramsay, also serve on one or more of the following committees: Executive, Strategic Planning, Nominating, Audit, Finance, and Campus and Community Enterprise.
- Increased current use and endowment assets of UMBF, Inc., under management since the foundation's inception in FY00, to \$75.8 million in FY05 (Chart A). Total UMBF, Inc. assets as of June 30, 2005, were \$93 million, which includes pledge commitments. This growth in foundation assets includes components of fundraising and investment returns (Chart B).
- Expenditures of UMBF, Inc. funds in support of campus programs have also increased from \$14 million in FY01 to \$19.4 million in FY05 (Chart C). The UMBF, Inc. expenditures represent 3 percent of total campus activity (Chart D). In FY05, processed 4,652 disbursement requests in support of the \$19.4 million in expenditures
- In FY05, members of the UMBF, Inc. initiated funding for UMB in the multi-year transportation reauthorization legislation—Transportation Equity Act (TEA). This \$2 million will enhance pedestrian and traffic safety, lighting, signage, streetscaping, and access to the UMB campus and BioPark.

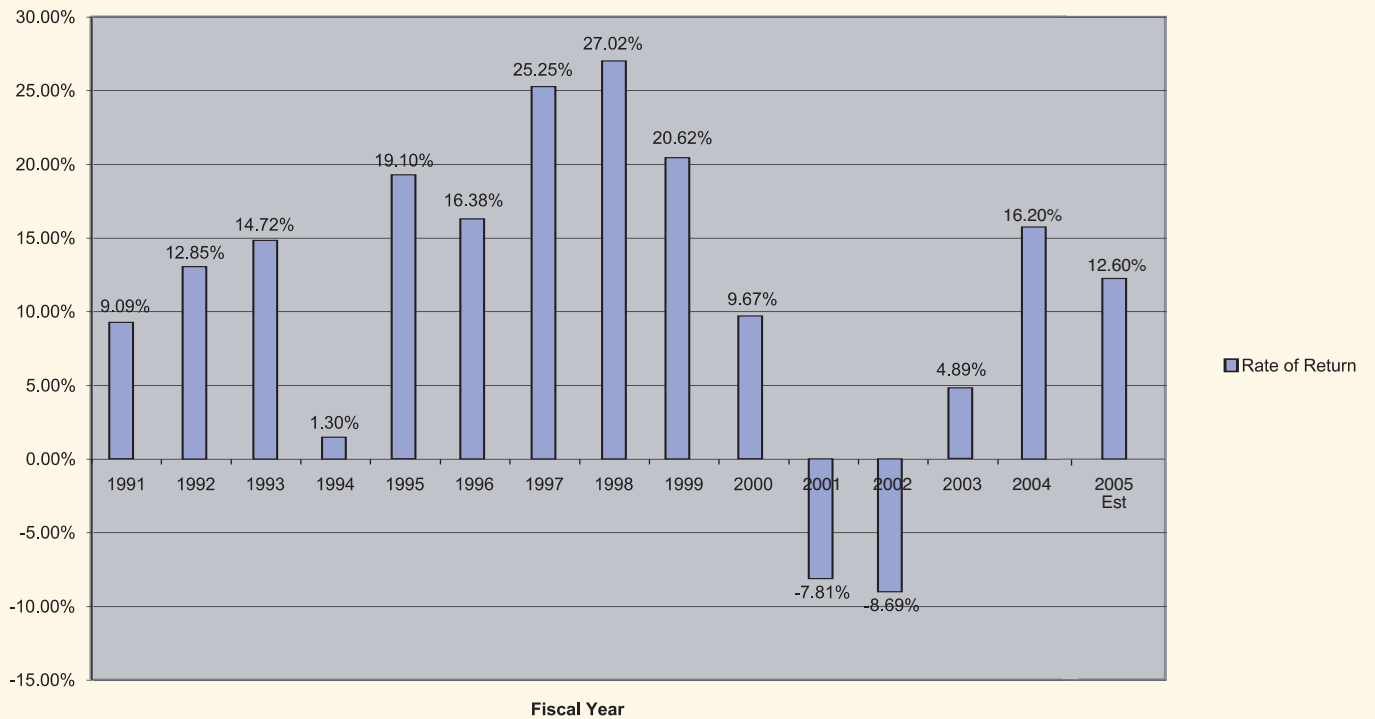
**Chart A UMBF, Inc., Current Use & Endowment Assets as of June 30**



*Identifies growth in the market value of campus assets, especially growth in UMB's total endowment as a result of both fundraising and improved market returns*

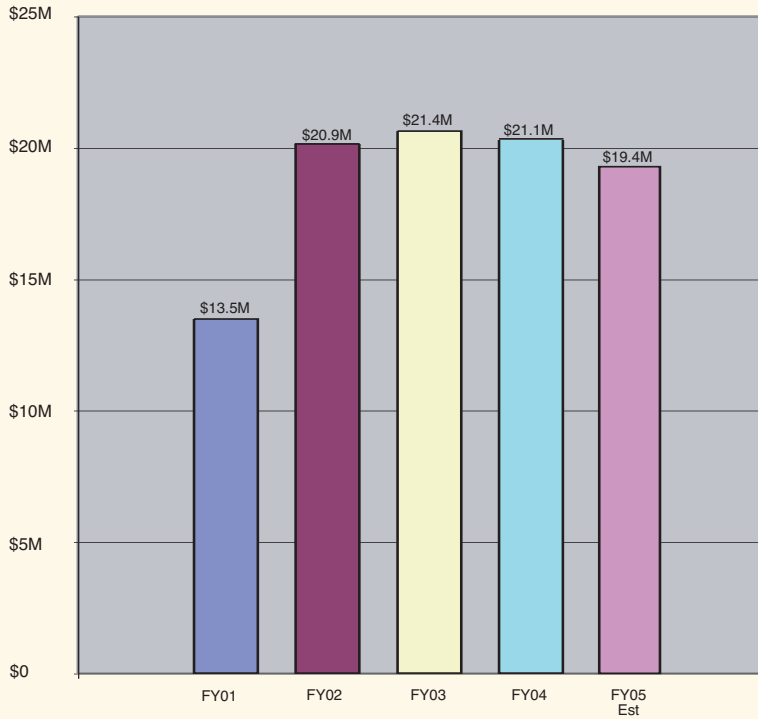
- UMBF, Inc. trustees served as members of the USMF, Inc. Investment committee and Budget and Finance committee. USMF, Inc. returns on the endowment investment pool were 12.6 percent and returns on the operating investment pool were 5.7 percent.
- Maintain UMBF, Inc. policies and procedures online at [www.oeaservice.edu](http://www.oeaservice.edu) for easy access

**Chart B** Endowment Investment Rate of Return for UMB Funds Invested by USMF, Inc.



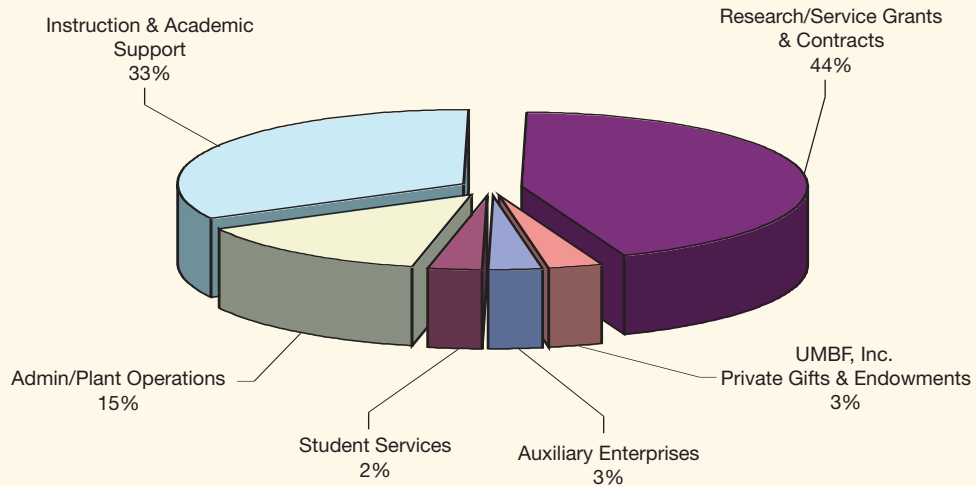
*Shows the 14-year history of annual investment rate of return on endowed funds invested for UMB by USMF, Inc.*

**Chart C UMBF, Inc., Disbursement Dollars**



*Indicates the annual dollar level of foundation expenditures in support of UMB programs*

**Chart D Uses of Funds FY05 Total Dollars: \$692 Million**



## **OEAGOVERNMENT AND COMMUNITY AFFAIRS**

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(410) 269-5087 [www.oea.umaryland.edu/gov](http://www.oea.umaryland.edu/gov)

### **OVERVIEW**

The Office of Government and Community Affairs represents the University of Maryland, Baltimore on issues of interest to representatives of local, state, and federal government, and serves as the central campus liaison to the local community.

### **SERVICES**

#### **Community Outreach**

Serves as liaison to involve the community in campus activities and services and develops partnerships to enhance and promote the impact of the University's programs and services. Coordinates community outreach programs and events

#### **Information/Advocacy**

Provides campus and community leaders with timely notification of upcoming hearings, meetings, and events. Coordinates meetings with public officials and University leaders to enhance awareness of campus initiatives, services, and programs. Plans and coordinates advocacy activities for the campus community and various constituencies

#### **State and Local Legislation**

Distributes copies of state and local legislation to campus experts to seek guidance and input. Develops coordinated positions on relevant legislation and coordinates with the governor's office and the University System of Maryland. Guides development of verbal and written testimony, amendments, and legislation

#### **Federal Activity**

Works with federal representatives and their staffs to address specific campus initiatives and advocates on legislation affecting higher education and health care

#### **Public Officials Database**

Maintains official campus database of public official contact information

#### **Reports**

Provides presentations and reports on significant legislative issues and outcomes relating to legislative deliberations. Distributes reports issued by government agencies to appropriate campus representatives for review and discussion

### Constituent Inquiries

Serves as the contact point for information requests by the legislative and executive branches of government. The office responds to numerous requests for information relating to areas such as admissions, financial aid, and residency status of students, community services, patient referrals, and personnel actions.

# FY05

## ACCOMPLISHMENTS

### State Funding

- Supported campus efforts to successfully increase state operating funding; secure capital funding for the new Dental School facility; continue Cigarette Restitution Funds to support cancer- and tobacco-related activities; and increase funding for the graduate and professional scholarship programs and the student loan assistance repayment programs, benefitting UMB students and graduates

### Community Outreach

- Updated and expanded the online interactive database of more than 130 UMB community outreach programs operating throughout Maryland, which allows users to locate available services, volunteer opportunities, partnerships with local schools, and speakers on special topics
- Hosted more than 15 meetings with faith-based organizations, human service providers, and neighborhood associations to share information regarding UMB's community outreach, and coordinated more than 20 outreach programs and community events

- Served as campus representative for UMB BioPark initiative to Poppleton Village Center Board and Empower Baltimore Management Corporation Advisory Council

### Information/Advocacy

- Conducted more than 40 meetings with UMB advisory boards and student and faculty groups to facilitate information and advocacy efforts
- Organized a campus showcase in Annapolis highlighting the School of Social Work's Healthy Grandparents Program, the Maryland Poison Center in the School of Pharmacy, the School of Nursing's WellMobile Program, telemedicine linkages of the Statewide Health Network in the School of Medicine, oral health programs offered by the Dental School, the School of Law's Intellectual Property Legal Resource Centers, and the UMB BioPark
- Coordinated more than 15 advocacy events in Annapolis during the legislative session

- Hosted more than 50 site visits to UMB by federal, state, and local officials
- Arranged more than 300 meetings between campus leaders and state and local officials, including a site visit by the House Ways & Means Committee, to seek support for increased graduate and professional student financial aid
- In collaboration with the School of Pharmacy, helped to develop a video clip to demonstrate the changing role of pharmacists and the critical need to increase the pharmacy workforce
- Staff served on a number of work groups and committees, including University System of Maryland (USM) State Relations Council; USM Financial Aid Taskforce; Maryland Higher Education Commission (MHEC) State Plan Work Groups; MHEC Higher Education Segmental Liaisons; Maryland Rural Health Association; Maryland Chamber of Commerce Health Care Subcommittee; Future of UMB; Martin Luther King, Jr. Celebration; Black History Month; and Women's History Month

#### **State and Local Legislation**

- Tracked more than 800 bills considered by federal, state, and local government to ensure appropriate input from campus community and guided pertinent testimony
- Refined the Web-based response form, which enables campus experts to offer comments on bills in real-time; reviewed more than 2,000 bill comments from campus experts to determine appropriate action; and supported testimony on nearly 50 bills

#### **Federal Activity**

- Secured \$744,000 in earmarked appropriations for: School of Pharmacy renovations (\$496,000) and operating support for the newly created Institute for Educators in Nursing and Health Professions (\$248,000)
- Arranged more than 100 meetings between campus leaders and federal representatives

#### **Public Officials Database**

- Maintained database of more than 400 federal, state, and local officials
- Provided more than 100 sets of mailing labels for campus events on request

#### **Reports**

- Produced and distributed *Highlights of the 2005 Session Report* and *End of 2005 Session Report* to more than 200 campus, USM, and advisory board representatives. Briefed campus groups or representatives on legislative matters
- Refined database to track reporting requirements, task force appointments, special committees, and regulations relating to outcomes from the state legislative session

#### **Constituent Inquiries**

- Provided assistance in response to more than 75 constituent inquiries

