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SUBJECT: Advancement Committee Meeting Report for **September 25, 2024**

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In accordance with MGLA Chapter 30A and amended by On March 29, 2023, Governor Healey signed Chapter 2 of the Acts of 2023, which amongst other things, extends the remote meeting provision to March 31, 2025. other things, further extends temporary provisions pertaining to the Open Meeting Law to March 31, 2025. Specifically, this extension allows public bodies to continue holding meetings remotely without a quorum of the public body physically present at a meeting location, and to provide "adequate, alternative" access to remote meetings.

In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Present for the advancement committee were Trustees James Lampassi Jr. (chair), Yalile Maldonado (vice-chair), Dino Di Palma, Alyce Davis, Thatcher Kezer, President Keenan (ex-officio), Interim Vice President Mandy Ray, and Executive Assistant Hai Huynh.

Trustee Lampassi Jr. (chair) called the meeting to order at 3:46 p.m.

**Meet the Moment Campaign Update** (*presentation attached*)

Former VP Webster Crouse submitted a written report on Advancement including a report on fundraising as of August 31, 2024 for the committee's review prior to the meeting.

Interim Vice President Ray provided an update on the *Meet the Moment*<sup>™</sup> campaign. She introduced herself and shared her excitement to assume the role of interim vice president of advancement and executive director of the Alumni Association and Foundation, Inc. She expressed gratitude to former VP Webster for her 14 years of service to the university and the Alumni Association and Foundation (AAF). She shared that she is working on thoughtfully crafting a transition plan for both the advancement team and the AAF to ensure the momentum of the campaign continues. On Monday, September 16, the AAF held a productive and informative retreat, facilitated by George Watt of the Association of Governing Boards (AGB). The AAF along with university leadership and deans participated and discussed the importance of trusteeship, vital roles of volunteers, and informed advocacy. The advancement team raised over \$14 million in FY24, another record-breaking fundraising year. The team also reached the campaign's original goal of \$50 million. As of September 23, 2024, \$55,394,949 has been raised with \$27.4 million for financial aid, \$2.4 million for SSU Bold, \$11.6 million for student success, and \$13.9 million for unrestricted. Ray reviewed the campaign fiscal year totals, the different types of gifts, and the market value of the endowment increase from \$32.5 million in FY20 to \$66.3 million currently.

The university recently received a \$10 million gift from an anonymous donor to establish Clipper Scholarships for students who have exhausted state and federal support programs. She reviewed the purpose, benefits, and the donor's motivation for donating. She reported that \$324,000 will be awarded in FY25 impacting 40-80 students annually.

Advancement FY25 goals include raising \$10 million towards the Meet the Moment campaign and implementing a robust engagement strategy.

Advancement key events include the following:

- Donor and Scholar Celebration on November 13, 2024
- Boards Holiday Party: December 11, 2024
- Florida 2025: March 12-16, 2025
- Various Regional Events: TBD
- Athletic Hall of Fame: April 2025
- Viking Warrior Day: May 1, 2025
- Alumni Weekend/Part on McKeown Plaza (POMP): June 6-7, 2025

## Questions

Trustee Lampassi Jr. congratulated Ray on her position. Trustee Di Palma asked how the Board of Trustees and the advancement committee can best assist the advancement team and their work. Ray shared that Trustees are welcome to host events, open doors of opportunities to connect with friends and prospective donors, connect work of other organizations with our team, become an ambassador, partner with reunion class, and assist with appeals. Trustee Di Palma shared that the Trustees being involved and showing support of the campaign is important.

Trustee Davis thanked Ray and the advancement team for their work and engaging with alumni.

Chair Morales shared her thanks to Ray for her presentation and is particularly excited about the robust engagement initiatives. She also offered her help to support the effort. She noted that Ray mentioned that the financial aid priority resonated well with donors and asked for more information regarding that. Ray shared that many of the donors who have set up scholarships understand and appreciate how important it is to help students and that it is standard for individuals to lean towards supporting financial aid in higher education.

There being no new business to come before the committee,

**A motion was made by** Davis, seconded by Di Palma, and unanimously voted to adjourn the meeting. Lampassi Jr. asked for a roll call vote:

Voting in the Affirmative: Lampassi Jr. (chair), Maldonado (vice-chair), Di Palma, Davis

Voting in the Negative: None

Absent: Kezer

The meeting was adjourned at 4:08 p.m.

# MEET THE MOMENT™

*The Campaign for* **SALEM STATE UNIVERSITY**

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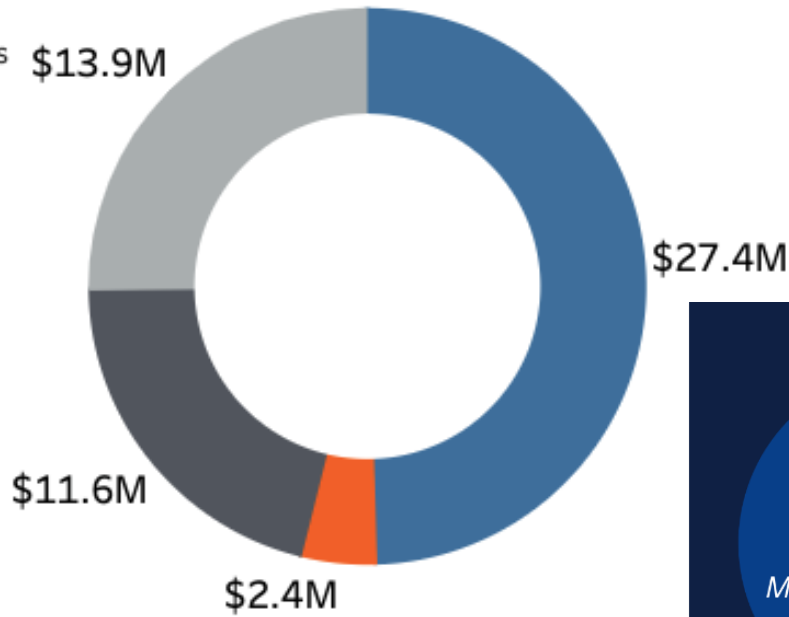
**Advancement Committee  
Board of Trustees  
September 25, 2024**

Mandy Ray, Interim Vice President, Advancement and  
Executive Director SSU Alumni Association and Foundation Inc.

# \$55,394,949 raised as of 9-23-24

## Campaign Priorities

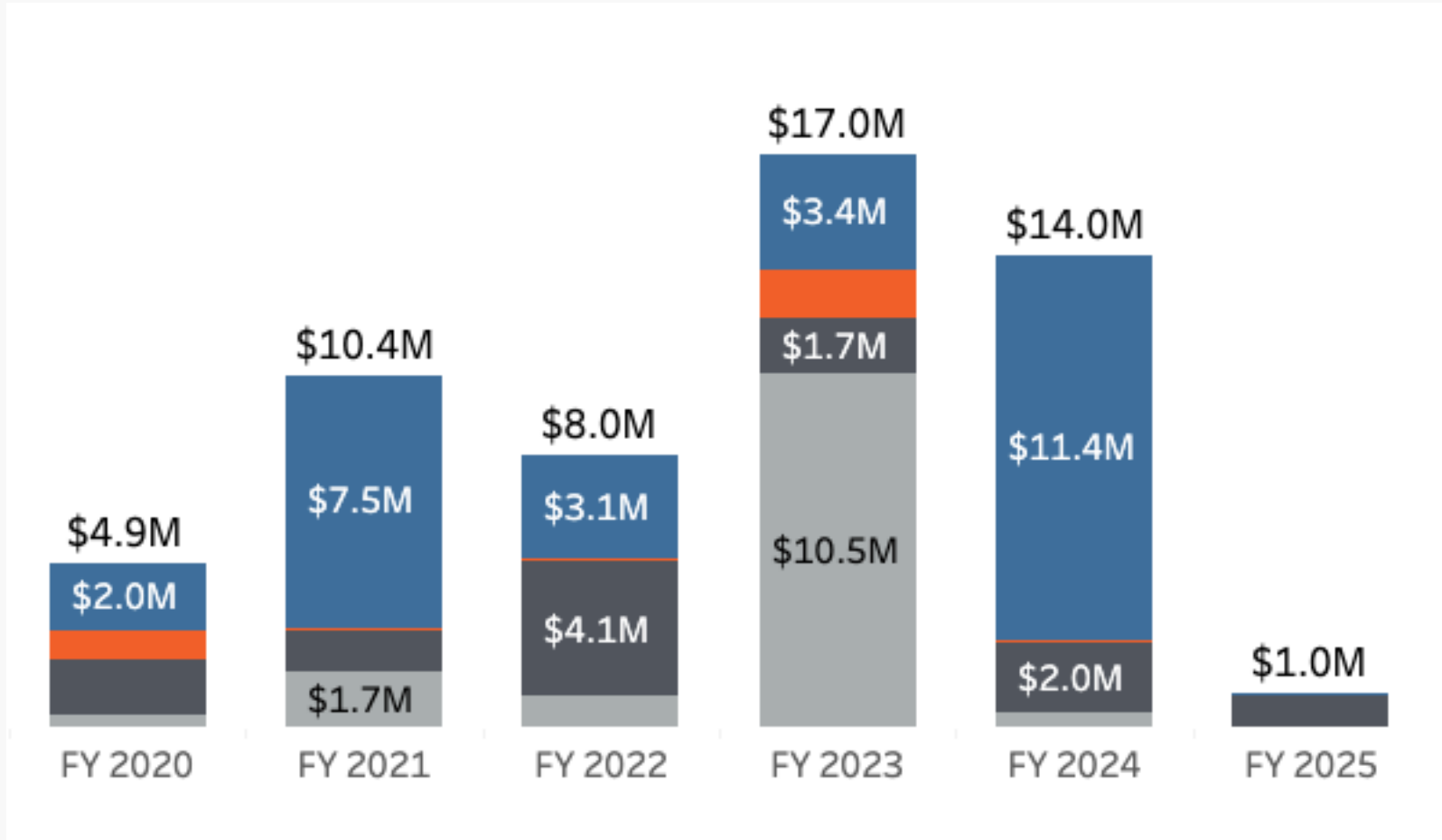
- Financial Aid
- SSU Bold
- Student Success
- Unrestricted



**\$75M**  
MEET THE MOMENT™ GOAL

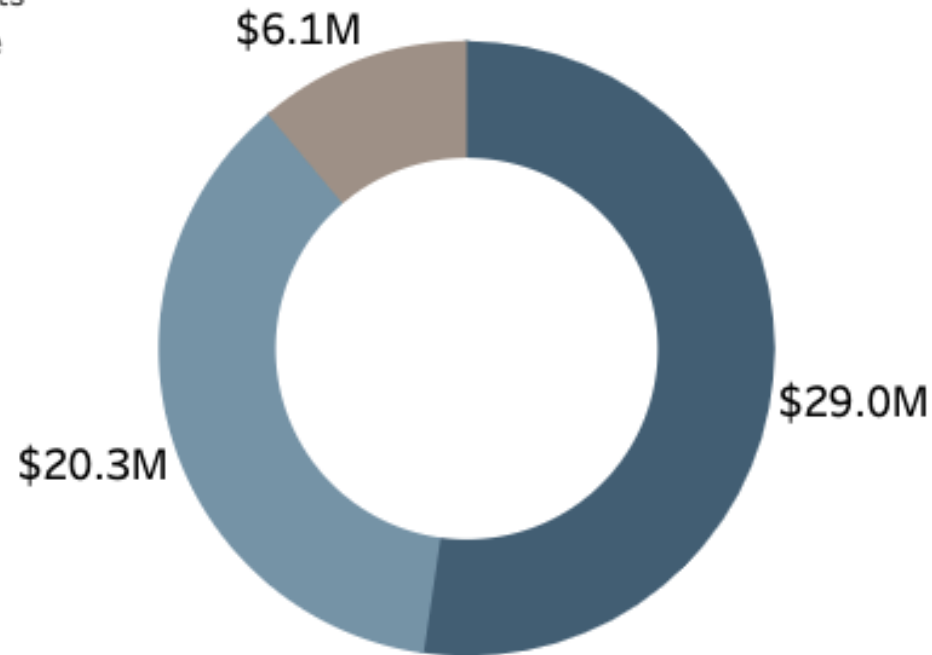
\$25M	STUDENT SUCCESS
\$20M	FINANCIAL ASSISTANCE
\$20M	UNRESTRICTED SUPPORT
\$10M	SSU BOLD

# Campaign Fiscal Year Totals

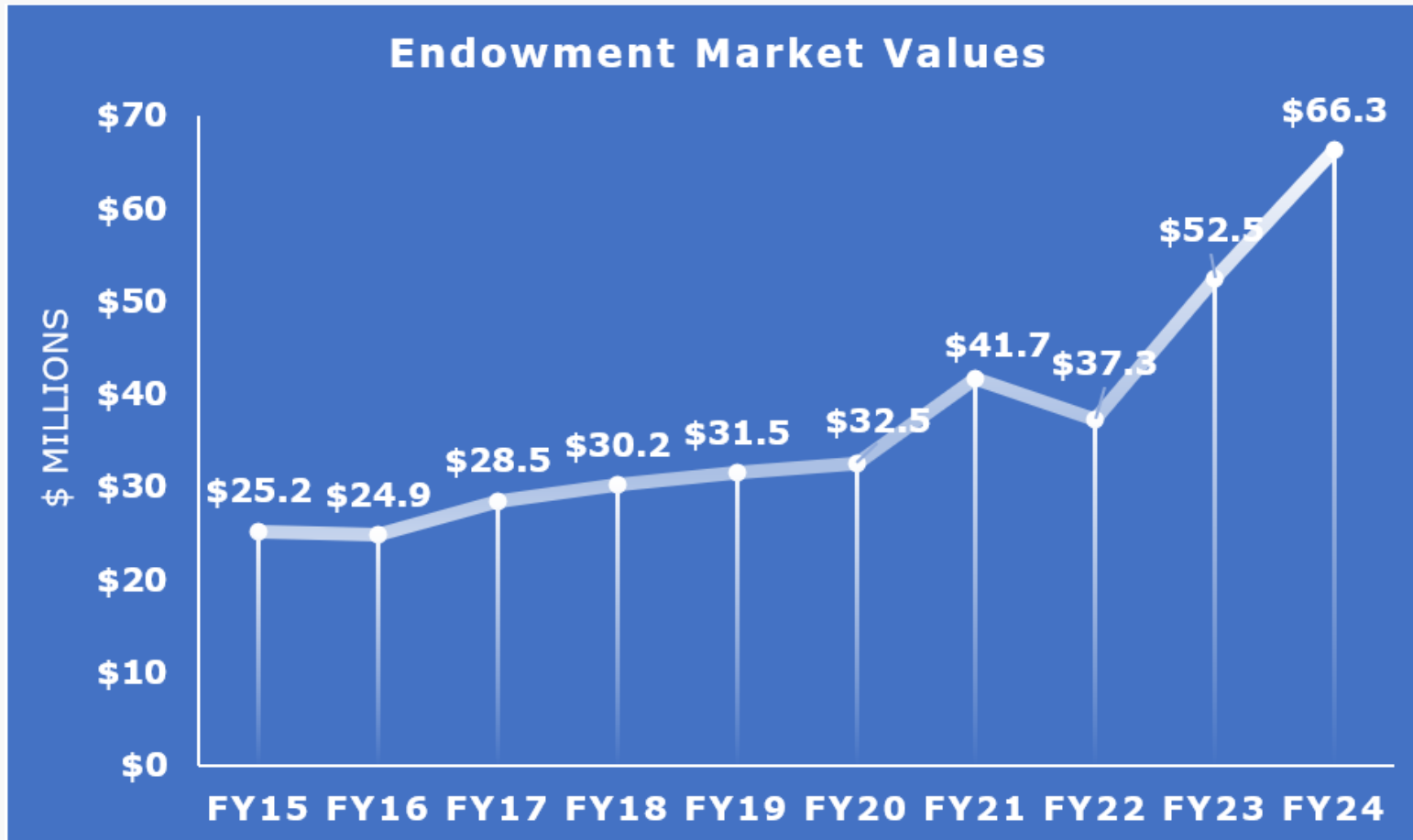


## Endowed, Expendable, and Planned

- Endowments
- Expendable
- Planned



# Market Value



# Clipper Scholarship Impact

Roughly \$324,000 to be awarded in FY25  
40-80 students receive a scholarship annually

Home > Philanthropy news > Salem State University receives anonymous \$10 million gift

## Salem State University receives anonymous \$10 million gift

September 8, 2024

Salem State University has announced an anonymous \$10 million gift in support of scholarships for students in the Maguire Meservey College of Health and Human Services and the McKeown School of Education.

The gift establishes the Clipper Scholarship and provides last-dollar support to students who are just over the cusp of Pell-eligibility and often left out of federal and state aid programs. The funds will cover the cost of attendance, including tuition, room and board, books, and meal plans.



Schools

## \$10 Million Salem State University Gift To Create New Scholarship Fund

The record, anonymous donation will create the "Clipper Scholarship" for students who have exhausted state and federal support programs.

Scott Souza, Pa



News Weather Closings Sports ... Live

68°

Posted Tue, Sep 3, 2024

## Anonymous donor gifts \$10 million to Salem State University

BY DAKOTA ANTELMAN  
SEPTEMBER 3, 2024

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# Clipper Scholarships

- **Purpose:** Established by an anonymous donor to support students at the McKeown School of Education and Maguire Meservey College of Health and Human Services. Can be awarded to a student for up to four years within five years.
- **Who:** Students just above Pell Grant eligibility, often missing out on federal and state aid.
- **Benefits:** Covers tuition, fees, room and board, books, meal plans, and other related costs to minimize educational debt.
- **Donor's Motivation:** Inspired by their parents' experience at Salem State in the 1950s, aiming to alleviate financial barriers for students and support their educational journey.

# Advancement FY25 Goals



## Raise \$10 million towards Meet the Moment campaign

- Gift officers continue to grow relationships with donors through individual outreach efforts and the DEP process
- Corporations and Foundation's partnerships
- Annual fund campaigns that include direct mail, digital efforts and texting
- 8<sup>th</sup> Annual Viking Warrior Day – May 1, 2025

# Advancement FY25 Goals



## Robust Engagement Strategy

- Connecting with high-rated donor prospects who are currently unengaged to make meaningful connections
- Recruiting alumni and donors to connect with students-career talks or speaking in class
- Celebrate our distinguished graduates through programs like 40 under 40, the It Takes a Viking podcast, the athletic hall of fame and our awards programs
- Publishing the next issue of the Salem Statement magazine

# Advancement Key Events

- Scholar and Donor Event: November 13, 2024
- Boards Holiday Party: December 11, 2024
- Florida 2025: March 12-16, 2025
- Various Regional Events: TBD
- Athletic Hall of Fame: April 2025
- Viking Warrior Day: May 1, 2025
- Alumni Weekend/POMP: June 6-7, 2025

# Questions?



### **Advancement Brief**

The primary focus of our September 25, 2024, Advancement committee meeting will be to update the Board of Trustees on the Meet the Moment campaign.

Please find a report on the work that occurred from July 1, 2023 through June 30, 2024. The work of the AAF and Advancement has been mapped to the Meeting the Moment SSU Strategic Plan so you can see the continued impact the campaign has made on the current strategic plan including student success.

### **Advancement FY24 Report:**

Five years into the *Meet the Moment*<sup>™</sup> (MTM) campaign, our progress remains remarkable, with \$54,361,478 raised, representing 72 percent of our ambitious \$75 million goal. The steadfast support of 6,797 donors, who have generously made over 14,819 donations to date, underscores the enduring commitment to our mission. This year, AAF and Advancement raised \$14,007,656 toward our fiscal 2024 goal of \$17 million which included a tie-breaking record gift of \$10 million gift in support of financial assistance for students in the Maguire Meservey College of Health and Human Services and McKeown School of Education. Moreover, we have initiated discussions and meticulously crafted funding proposals for three prospective transformational gifts, poised for realization in FY25.

Our focus on donor engagement and retention has yielded 39 percent of our donors from the previous year retained. Impressively, 77 percent of our three-plus year consecutive donors chose to continue their support, demonstrating their unwavering dedication. Additionally, we welcomed 698 new donors into our philanthropic community, further expanding our network of support. Renewal of the State Endowment Incentive match program by the Board of Higher Education provided an invaluable opportunity for Salem State to leverage the \$555,555 match, resulting in the growth of 27 funds, thereby amplifying the impact of our collective contributions and growing our endowment significantly.

**Academic Excellence and Active Learning:** Since July of 2019, 1,047 students from 33 majors received donor-supported internship scholarships. This year, \$2,722,264 was raised for new and existing scholarships. With a keen focus on internship scholarships, we were successful in raising \$771,564.91 for this experiential learning opportunity through outreach efforts and our inaugural internship celebration event, which raised \$220,000 for internship stipends. We are pleased to share 105 students benefitted from internship scholarships this year.

Philanthropy continues to be a driving force behind student success programs, including the Emerging Scholars Program, progression grants/RISE program and the La Vida Scholars initiative. This year, solicitation campaigns were strategically deployed to garner support for various schools and colleges, utilizing channels such as direct mail, digital communications, and personalized outreach from the respective deans themselves. Notably, Dean Raminder Luther of the Bertolon School of Business, Dean Joseph Cambone of the McKeown School of Education, Dean Sami Ansari of the Maguire Meservey School of Health and Human Services, Dean Elizabeth McKeigue of the Berry Library, and Dean Brian Vander Heuvel of the College of Arts and Sciences engaged in these efforts. Cases for support were developed for the School of Social Work and School of Nursing, which will be introduced in FY25 along with solicitation efforts for their funds.

A recent generous donation has been allocated to support the Center for International Education and faculty-led travel initiatives. This contribution has enabled stipends for faculty instructors and Pell-eligible students assistance with incidental expenses during trips. Additionally, this support will facilitate 6-15 students' travel to Nanjing Normal University in China, strengthening the partnership between our institutions. Furthermore, a donor has committed to backing student stipends in geological sciences for the Montana field camp trip, facilitating faculty-led research opportunities and providing funding for unpaid internships. The Davis Educational Foundation has pledged support for the STEM redesign team project, while the Klarman Family Foundation has generously donated to bolster the School of Social Work. This planning grant not only assists the school in identifying needs and areas for improvement but also directly aids students in their educational pursuits.

**Civic Engagement and Public Good:** Since the start of the campaign, the Center for Civic Engagement has received \$15,000 in unrestricted funds, crucial funding that ensures the annual First Year Day of Service program continues. This year, advancement worked with a donor to create the first ever endowment for the Berry Institute of Politics. This endowment will provide annual unrestricted support for the IOP in perpetuity.

**Justice, Diversity, Equity, and Inclusion:** The foundation's JEDI ad-hoc committee reviewed policies, bylaws and the strategic plan and implemented inclusive language. The advancement team participated in a three-month long inclusive leadership certificate training program with WillHouse Global.

**Campus Community and Culture:** We continue to utilize the platform of the campaign to share stories and successes while activating volunteers and ambassadors to spread the word about *Meet the Moment*<sup>™</sup>. All event speaking

remarks included campaign messaging, and advancement assisted in developing the remarks for commencement speakers this year. In addition, we led the efforts on university-wide programming like the rededication of Charlotte Forten Hall and the retirements of Nate Bryant and Lee Brossoit, which all included a fundraising component to the community events.

The advancement team continues to hold monthly team meetings in person and in June hosted an annual team retreat. We executed 80 virtual and in-person events this year including 5 regional FEC events. The AAF (Association and Foundation) sponsored 10 events with 596 unique attendees, of whom 24 were new donors and nine were newly identified as a major gift prospect.

The team hosted a successful and most well-attended annual scholars and donor celebration in history. We returned to Naples, Florida for our annual programming. We hosted the Educators Hall of Fame, BSB spring social, the Educators Pinning Ceremony, and Veterans Stole Ceremony. The *It Takes a Viking* podcast released six new episodes, further highlighting our high-achieving Vikings and campaign volunteers. Donor impact stories and press releases (26) were widely circulated on the website, social media, and Polaris channel for the internal university community.

As a result of the unification of the Alumni Association and Foundation in FY23, the SSU Alumni Association and Foundation, Inc. along with Advancement worked with Stoltze design to create a formal brand logo which also included design applications and treatments for use which will be shared in FY25. Finally, we ended the year with Alumni Weekend, which includes POMP (Party on McKeown Plaza), class reunion/giving efforts for classes of 1964 and 1974 and hosted a celebration to recognize alumni awardees at our president's luncheon.

**Operational Excellence and Infrastructure:** Since the start of the campaign, we have raised \$2,313,342 for SSU BOLD. Advancement continues to build partnerships with supporters in the science, healthcare and biotech industries to secure gifts toward this fundraising priority. Working with financial aid and career services, we began creating a more streamlined and equitable process for students to request internship scholarships. Furthermore, the newly formed Salem State University Alumni Association and Foundation, Inc. (AAF) has developed and implemented their inaugural strategic plan, accompanied by key performance indicators (KPIs) to measure the achievement of their objectives.

**Financial Vitality and Sustainability:** Since the commencement of our campaign, 1,579 students have experienced increasing benefits from donor-supported financial assistance, notably through Viking Completion Grants (223) and the Student



Emergency Fund (828), which provides critical support to our food and housing insecure students. Additionally, nine new scholarships were established in FY24. This year, \$5,846,566 was transferred to the university, including the final installment of the Mellon Grant totaling over \$1.4 million, with \$958,986 allocated to financial aid. In recognition of the retirement of long-time employee and esteemed double Viking, Nate Bryant '87, '93G, who served as vice president of student success, the community rallied together, raising funds to establish the Bryant Family Student Emergency Endowment.

We also commemorated several individuals through memorial scholarships: the Ellen Flowers Scholarship for Aspiring Psychiatric Nurses, established by Dr. Kathy Sanders in memory of her dear friend and colleague; the Alyssa Fluet Memorial Scholarship, created by friends and family of Alyssa, a theatre major from the class of 2024; the Joseph and Rena Mendes Scholarship, established by Joanne Mendes '79 in honor of her parents; the Professor John Fox Memorial Fund, in memory of Salem State faculty member John Fox, established by former student Cristina Bitá '00; and the Murphy Family Scholarship, established by the children of Salem State faculty member Dr. Jo-Anne D. Murphy EdD '77, and her husband William H. Murphy.

In early November, a planned giving solicitation was sent to more than 1,100 planned giving prospects. The solicitation included a letter authored by fellow AAF board member Andrea Liftman encouraging others to join her in making a planned gift to Salem State. Included in the mailing was an informational brochure about estate planning as well as the campaign case for support. A follow-up digital newsletter was sent in May.

During our seventh annual Viking Warrior Day on May 1-2, a record-breaking \$786,426 was raised through 593 gifts from 534 donors.

Furthermore, we successfully conducted the annual audit of the AAF without any findings, while continuously improving our reporting mechanisms to evaluate the performance of our investment managers. This year, the AAF's endowment exceeded \$65 million.

We remain committed to personalized stewardship practices for our donors, including the creation of four donor impact reports for donors contributing over \$100,000, distribution of 260 endowment reports to fund contacts and donors contributing more than \$5,000, delivery of grant impact reports to nine foundations, production of an annual fund impact report for over 1,500 FY22 donors, and the publication of an impact report for over 11,000 donors, featuring the AAF's annual report and a campaign update. Additionally, all sponsorships for

programs such as the Darwin Festival, the BSB pitch contest and the Internship Celebration were successfully maintained.

**Event Save the Dates:**

Scholar and Donor Celebration – November 13, 2024 at 6 pm

Boards Holiday Party – December 11, 2024 at 6 pm

**Vice President and Executive Director Transition**

Since this will be my last report before departing Salem State on September 17, I want to thank each of you for your commitment to the work of Advancement. It has been a pleasure working with each of you in providing revenue to assist in advancing SSU's mission.

I know the proposed transition plan is in great shape and Mandy Ray's leadership will keep the momentum going for Meet the Moment. Mandy can cover this in greater detail in the committee meeting. I am grateful for the opportunity and pleased to turn over this important role to Mandy, she's been an incredible partner with me over the past five years. You know what an incredible person she is and how driven she is to keep the work going in support of Salem State's mission. I have no doubt she will continue to build off the momentum of the past 5+ years. I am so pleased to continue my Viking Pride through my own philanthropy in the years to come.

Wishing you much continued success!

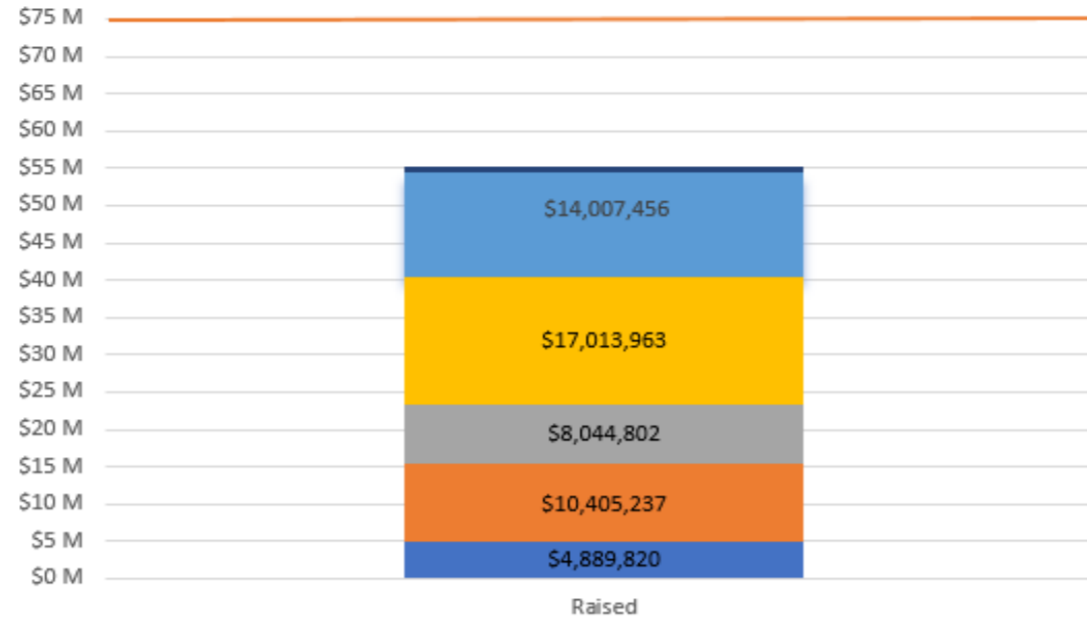
Attachment: August 2024 Fundraising Dashboard

## Monthly Fundraising Dashboard Fiscal Year 2025 August 31, 2024

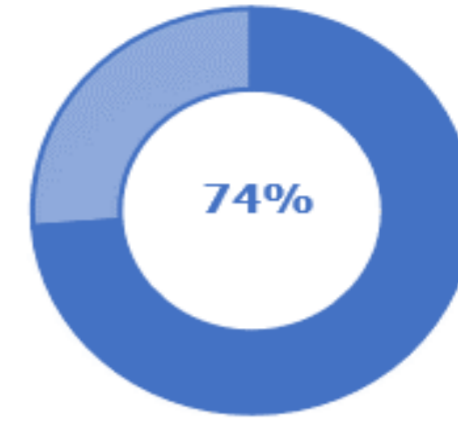
### FY25 Totals: 7/1/2024 - 8/31/2024

Dollars:	\$924,422
Donors:	146
Donations:	175
Median Gift:	\$50
Avg. Gift:	\$5,282

### Campaign Total: \$55,285,701



### Campaign Progress

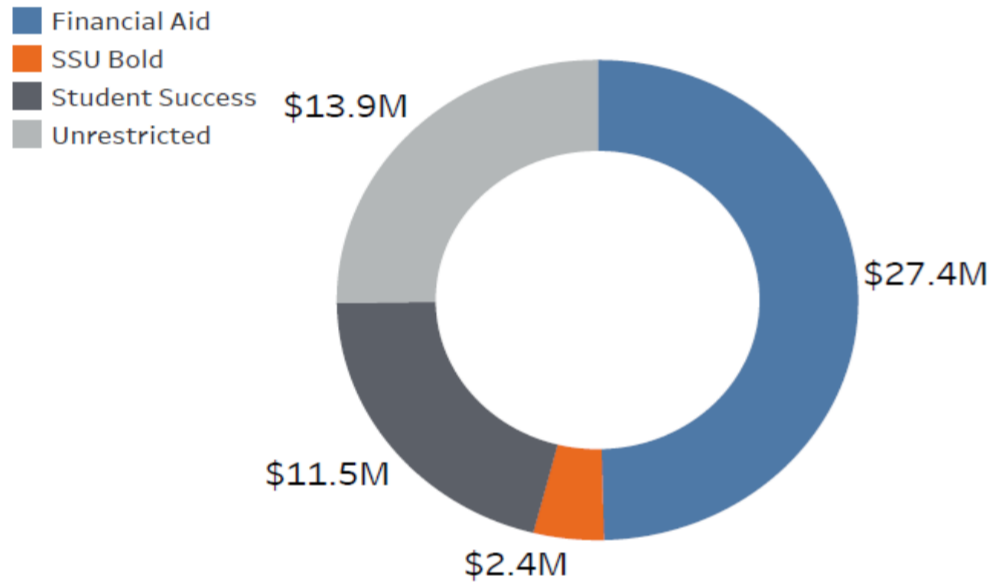


Donors	Donor Base FY25	Donors Retained	% Retained
Retained from previous year	2,332	112	5%

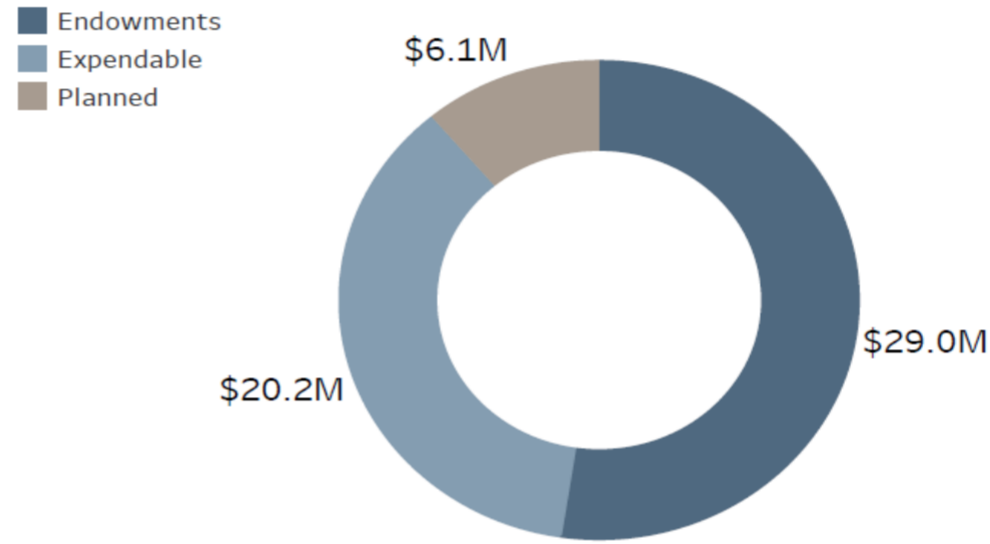
Total: \$55,285,701

## Fundraising Analytics

### Campaign Priorities



### Endowed, Expendable, and Planned



University Fundraising Priority	Goal	Total Raised	Balance	% to Goal
Financial Aid	\$20,000,000	\$27,434,579	-\$7,434,579	137%
Student Success	\$25,000,000	\$11,512,655	\$13,487,345	46%
SSU BOLD	\$10,000,000	\$2,413,542	\$7,586,458	24%
Unrestricted	\$20,000,000	\$13,924,925	\$6,075,075	70%
<b>Campaign totals</b>	<b>\$75,000,000</b>	<b>\$55,285,701</b>	<b>\$19,714,299</b>	<b>74%</b>

Gift Type	Goal	Total Raised	Balance	% to Goal
Endowment	\$30,000,000	\$28,977,915	\$1,022,085	97%
Spendable	\$30,000,000	\$20,162,886	\$9,837,114	67%
Planned Gifts	\$15,000,000	\$6,144,900	\$8,855,100	41%
<b>Total</b>	<b>\$75,000,000</b>	<b>\$55,285,701</b>	<b>\$19,714,299</b>	<b>74%</b>

### Board Giving

Volunteer Board	Total Campaign Giving	Annual Unrestricted FY25 Participation
Board of Trustees	\$3,567,774	9%
AAF Board	\$8,249,884	3%
Campaign II Steering Committee	\$9,967,104	0%