
SUBJECT: Advancement Committee Meeting Report for **September 24, 2025**

The Advancement Committee of the Board of Trustees met on **Wednesday, September 24, 2025 at 4:00 pm**, via Zoom in accordance with [MGLA Chapter 30A, section 18](#) as amended by [An Act relative to extending certain COVID-19 measures adopted during the state of emergency](#), signed by Governor Healey on March 31, 2025, which among other things extends policies allowing remote participation for public meetings until June 30, 2027.

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), Alyce Davis, Dino Di Palma (vice chair), Thatcher Kezer, President Keenan (ex-officio), Vice President Mandy Ray, and Executive Assistant Hai Huynh.

Trustee Lampassi Jr. (chair) called the meeting to order at 3:47 pm.

Advancement Committee Charter (action)

Lampassi Jr. reviewed the revisions made to the advancement committee charter. Revisions included non-substantial changes to ensure the committee charter follows the university's style guidelines.

A motion was made by Kezer, seconded by Davis, and unanimously voted to recommend that the Board of Trustees approve the following motion pertaining to the committee charter.

Recommended motion: The Board of Trustees of Salem State University hereby approves the proposed revisions to the Advancement Committee Charter as presented.

Voting in the Affirmative:	Davis, Di Palma, Kezer, Lampassi Jr. (chair)
Voting in the Negative:	None
Absent:	None

Naming Opportunities and Gift Recognition Policy (action)

Trustee Lampassi reviewed the revisions made to the Naming Opportunities and Gift Recognition Policy. The revisions included replacing the former vice president of advancement's name to the current vice president, ensuring the policy followed the university style guidelines, and replacing Foundation with the Alumni Association and Foundation (AAF) due to the unification of the two boards in 2023.

Vice President Ray shared that the policy was originally established in 2014 during the last campaign, *10,000 Reasons*, and was updated in 2020 when the Board of Trustees and the former Foundation Board voted to approve for the university to enter the current campaign, *Meet The Moment*. The policy also includes a guide for naming funds for scholarships and awards. President Keenan also noted that the policy states that the Board of Trustees has the authority to terminate namings, "in the unlikely event the university determines in its reasonable and good faith opinion that circumstances have changed such that the naming

chosen would inflict damage to the university's reputation, standing, or integrity, or be contrary to university values." The clause is outlined in the individual naming agreements as well.

Vice President Ray also highlighted that the Board of Trustees is specified at the end of the policy as the governing body that reviews and approves revisions to the policy. She also noted that any gift over \$100,001 will need to be brought forward to the gift acceptance committee, charged by the AAF, and the Board of Trustees for naming and recognition approval. The advancement team has identified over 70 naming opportunities in SSU Bold and hopes to bring many of them to the Board of Trustees for approval.

Chair Morales asked for clarification regarding who is responsible for bringing forth the suggested namings to the Board of Trustees. VP Ray confirmed it the VP of Advancement is responsible for maintaining the records of naming opportunities and she would bring opportunities to the board as they arise.

A motion was made by Davis, seconded by Kezer, and unanimously voted to recommend that the Board of Trustees approve the following motion pertaining to the naming opportunities and gift recognition policy.

Recommended motion: The Board of Trustees of Salem State University hereby approves the proposed revisions to the naming opportunities and gift recognition policy as presented.

Voting in the Affirmative:	Davis, Di Palma, Kezer, Lampassi Jr. (chair)
Voting in the Negative:	None
Absent:	None

Meet the Moment Campaign Update (*presentation attached*)

Vice President Ray submitted a written report on advancement including a report on fundraising as of August 31, 2025 for the committee's review prior to the meeting. She reported that \$60,343,747 has been raised to date towards the \$75 million campaign goal with \$29.9 million for financial aid, \$14.7 million for unrestricted, \$12.8 million for student success, and \$2.9 million for SSU Bold. She shared noteworthy gifts including \$150,000 from the Murray Burnstine Charitable Trust, \$150,000 from the Cummings Foundation, and \$480,000 from the MA State Endowment Match.

Advancement team updates include promoting Associate Director of Principal Giving Palmedo to assistant vice president of advancement and the restructuring of front-line fundraising positions with the following positions open to fill: associate director of annual giving, staff associate for annual giving (donor engagement officer), director of principal giving, and a corporations and foundations coordinator.

VP Ray shared the plans for SSU BOLD fundraising including the identification of naming opportunities, communication plans, annual fund plans, corporate and foundations plans, principal giving plans, engagement plants, and volunteer support and engagement needs. She invited trustees to support SSU Bold on Viking Warrior Day, annual fundraising day, reviewing and vetting prospect lists, and attending/supporting engagement events.

She provided an update on the Alumni Association and Foundation (AAF) board. The AAF approved six new board directors at their meeting on September 15 including 3 graduates, 2 friends, and 1 student. She reviewed the funds transferred to the university since the campaign inception with a little over \$2 million in FY19 and nearly \$5 million in FY25. The endowment market value increased from \$24.9 in FY16 to \$77.8 million in FY25.

Upcoming events

- Scholar and Donor Celebration: November 19 at 6:30 pm
- Boards Holiday Party: December 10 at 5:30 pm at the Hawthorne Hotel
- Washington, DC Alumni and Friends Reception: October 15 at 5:30 pm
- Viking Warrior Day: April 28-29
- Alumni Weekend: June 5-6

Questions

Lancome asked why the student success campaign priority supports. VP Ray shared it would support experiential learning opportunities, mentoring programs like the Emerging Scholars program, and geared to assist SSU students get to the finish line unrelated to financial need. Chair Morales asked VP ray to present the list of programs to the Board of Trustees at their upcoming October 15 meeting.

President Keenan emphasized the importance of introductions to individuals and companies to help support the fundraising goal.

Chair Morales encouraged the trustees to ensure 100% giving participation during Viking Warrior Day.

There being no new business to come before the committee,

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

Voting in the Affirmative:	Davis, Di Palma, Kezer, Lampassi Jr. (chair)
Voting in the Negative:	None
Absent:	None

The meeting was adjourned at 4:15 pm.

MEET THE MOMENT™

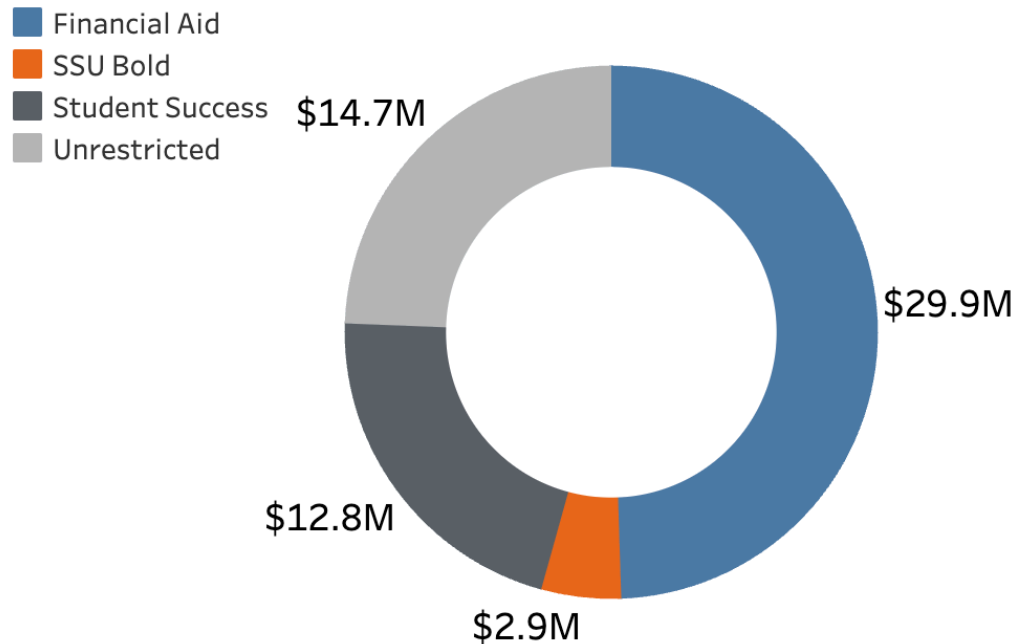
The Campaign for **SALEM STATE UNIVERSITY**

**Advancement Committee Meeting
9.24.25**

\$60,343,747 raised

Total: \$60,343,747

Campaign Priorities



Noteworthy Giving since June 2025



- \$150,000 Murray Burnstine Charitable Trust to support the Music Program
- \$100,000 Cummings Foundation to support the Center for Holocaust and Genocide Studies
- \$50,000 Cummings Foundation to support Completion Grants
- \$480,000 MA State Endowment Match- \$350K was allocated to the Unrestricted Endowment

Advancement Team Updates



- Julie Ellison Palmedo promoted to Assistant Vice President of Advancement
- Hiring several key fundraising positions after a restructuring of the front-line fundraising teams in annual and principal giving.
 - Associate Director, Annual Giving
 - Staff Associate, Annual Giving (Donor Engagement Officer)
 - Director, Principal Giving
 - Corporations and Foundations Coordinator

SSU Bold Fundraising

Naming Opportunities

- Finalized opportunities identified
- Fully socialized internally

Communications Plan

- Compelling **Case for Support** developed
- Brochures and Postcards
- Email and Social Media Updates



A Case for Supporting Salem State University

Meet the Moment

SSU BOLD

By modernizing our facilities and unifying our campus, SSU BOLD represents a dramatic leap forward for our university, consolidating Salem State University's campus footprint and providing state-of-the-art laboratories that will energize our curriculum and enhance our students' career preparation.

These efforts embody our vision for a Salem State that is more collaborative and student-centered. Salem State enrolls more students in biological and biomedical sciences, physical sciences, health professions, and related programs than any other state university in the Commonwealth. Unfortunately, our students are at a disadvantage

compared to their peers at other institutions that possess significantly stronger science facilities. Salem State's current science labs within Meier Hall, built in the 1960s, are inadequate for today's curriculum. SSU BOLD seeks to level the playing field in two significant ways. A two-story addition onto Meier Hall will add additional classroom space, including new labs, prep and support spaces and collaboration spaces for students. The renovation of the Hessel Meier building will create flexible classroom spaces, computer labs, student hubs, office space for faculty, an occupational therapy lab, bed skills labs, and nursing simulation labs.

A CAMPUS UNIFICATION AND MODERNIZATION PROJECT

Salem State needs to be the kind of a transformative journey. Through SSU BOLD, the university is reshaping the landscape of higher education on the North Shore by addressing long-term infrastructure needs. But the project is not merely about buildings or renovation, it's about community.

Beyond SSU BOLD there is a strategy to unify the campus, physically and culturally, to modernizing facilities, Salem State is enhancing the students' experience for students, fostering innovation and providing resources that set students on a path to success.

SSU BOLD is a game-changing initiative that redefines the future of Salem State—it's a landmark for the next chapter in the university's history.

It's propelling ideas, empowering voices, creating leaders, building community—all in an environment that helps things thrive. The world changes quickly and SSU BOLD will enable things to reach new heights in an ever-evolving landscape.



**MEET THE
MOMENT**

Salem State University Alumni Association and Foundation, Inc. | 862 Lafayette Street, Salem, Massachusetts 01970
978.682.7001 | info@saalemsate.edu | saalemsate.edu/moment

SSU Bold Fundraising

Annual Fund Plan

- **Year-End Appeals** featuring SSU Bold impact by department
- **Viking Warrior Day** dedicated focus on SSU Bold
- **Donor Recognition Wall** planning underway

C&F (Corporation & Foundation) Plan

- Prospect list undergoing careful vetting
- **Mailing of Statement + Case for Support**

Principal Giving Plan

- Vetting and prioritizing top donor prospects
- Personalized outreach being conducted



SSU Bold Fundraising

👊 Engagement Plan

- Community events at local **healthcare & STEM businesses**
- **Signature Event: Sign-a-Beam** (Estimated March 2026)
- SSU Bold featured prominently at **Alumni Weekend**

👧 Volunteer Support & Engagement

- Support SSU Bold on Viking Warrior Day
- Volunteers invited to: Review and vet prospect lists
- Attend and support engagement events



Alumni Association and Foundation Update

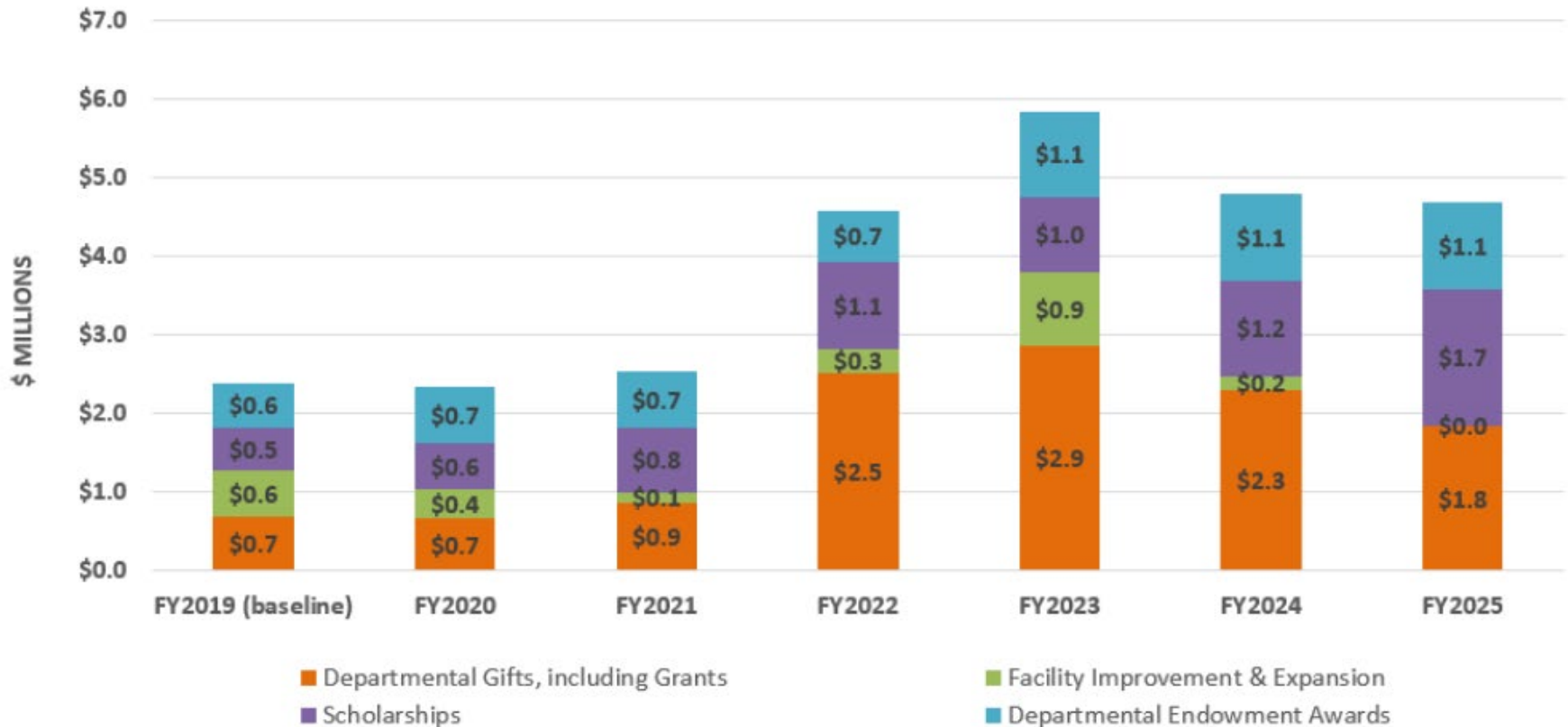
The AAF met on Monday, September 15 for first meeting of the year

Welcoming six new members to the board this fiscal year:

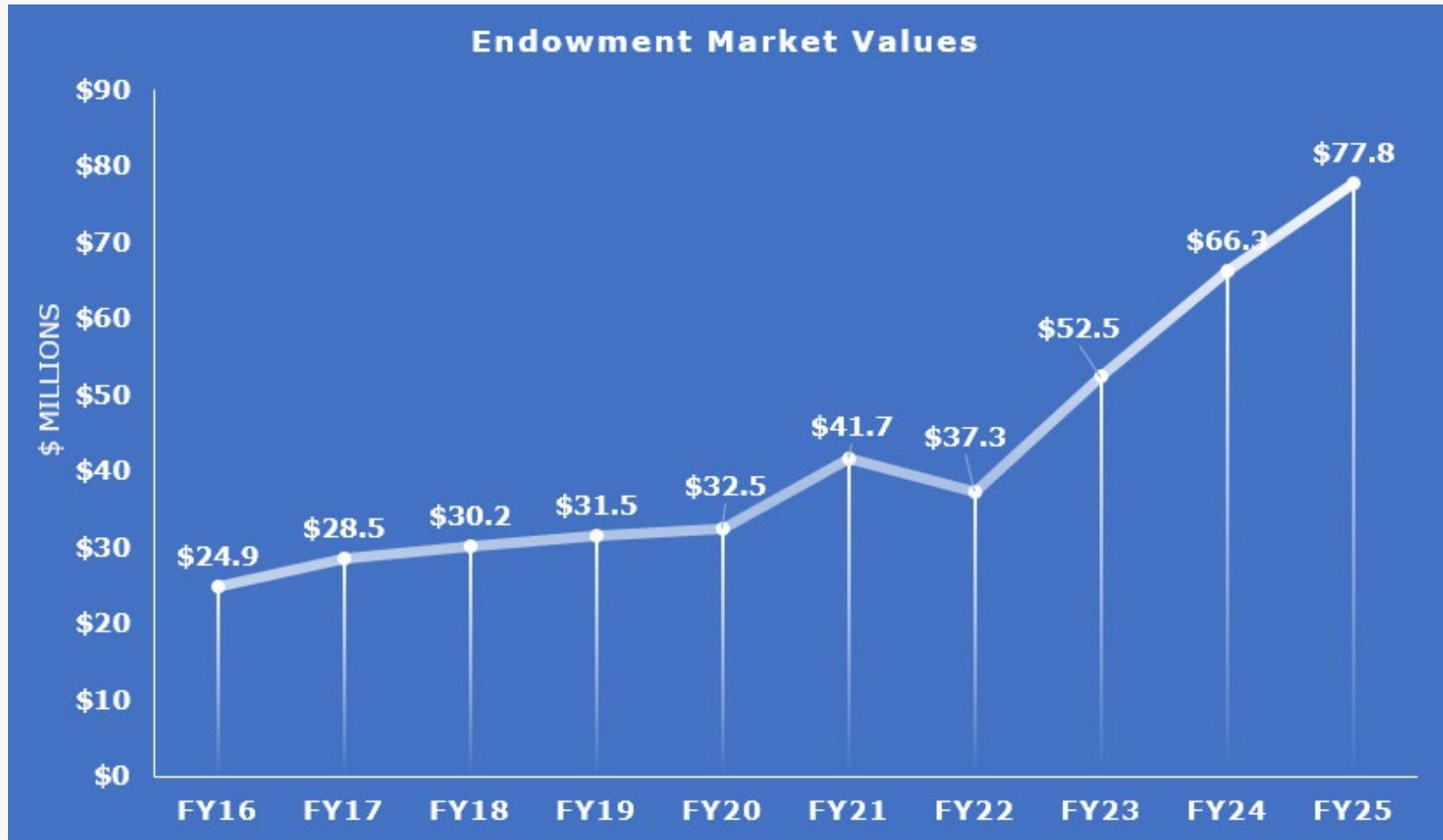
1. Daniel Vassallo
2. Hope Watt-Bucci '96G
3. Chris Corrente '10, '12G
4. Alexander Booker '14
5. Justin Young
6. Evie Holden '26, Nursing Major as the student director

Alumni Association and Foundation Update

Funds Transferred to university since Meet the Moment® Campaign Inception



Alumni Association and Foundation Update



Upcoming Events

- Scholar and Donor Celebration: November 19 at 6:30 pm
- Boards Holiday Party: December 10 at 5:30 pm @ Hawthorne Hotel
- Washington, DC Alumni and Friends Reception: October 15 at 5:30 pm
- Viking Warrior Day: April 28-29
- Alumni Weekend: June 5-6

Questions?

REQUEST FOR TRUSTEE ACTION

Date: September 3, 2025
To: Board of Trustees
From: Advancement Committee
Subject: Revisions to the Advancement Committee Charter
Requested Action: Approval

MOTION

The Advancement Committee hereby recommends that the Board of Trustees approve the following motion pertaining to the revised Advancement Committee Charter attached.

Recommended motion

The Board of Trustees of Salem State University hereby approved the proposed revisions to the Advancement Committee Charter as presented.

Committee Assigned: Advancement Committee
Committee Action: Approved
Date of Action: September 24, 2025

Trustee Action:
Trustee Approval Date: October 15, 2025
Effective Date: October 15, 2025

Signed: _____
Title: Secretary of Board of Trustees
Date: _____



Board of Trustees Advancement Committee Charter

Purpose:

The ~~a~~A~~c~~Advancement ~~c~~ECommittee of the Board of Trustees shall be a permanent committee which will be active and involved in the identification of university priorities and long-term plans that should be supported by private philanthropy. This committee will concern itself with the public's perception of the university efforts to promote the university to various constituents. This committee will provide reports to the Salem State University Board of Trustees as necessary. The ~~a~~A~~c~~Advancement ~~c~~ECommittee shall have the following duties and powers:

- Recommendations to the full Board concerning how the university and the SSU Alumni Association and Foundation can work together as agreed to in the Memorandum of Agreement to support the university's priorities and long-term plans
- Recommendations with regard to policies and programs related to the advancement of the institution, including activities involving alumni, campaigns, the SSU community and other external bodies, in order to foster understanding of, and support for, the university and its mission.
- Recommendations with regard to plans, proposals and the acceptance of major gifts to the Alumni Association and Foundation on behalf of the university in accordance with the guidelines of the Naming Opportunities and Gift Recognition Policy and the Gift Acceptance Policy. This is inclusive of all private funds, including: special gifts, endowments, bequests, and other means as annual or campaign gifts.

Responsibilities for Advancement

1. Within the scope of existing policies and procedures, make recommendations to the Board for the naming of any physical facility, campus grounds or academic program as appropriate.
2. In conjunction with the Salem State University Alumni Association and Foundation, set goals and funding priorities for major fundraising campaigns to benefit the university
3. In addition to making a personal gift, assist with the identification, education, cultivation and stewardship of prospects and donors to the university
4. Assist with expanding the pool of volunteers for consideration as Trustees, Alumni Association and Foundation Board, , Assistance Corporation, Campaign Committees and Deans Advisory Councils

Membership:

The ~~a~~A~~dvancement~~ committee shall have not fewer than three Trustees appointed by the Chair of the Board. The ~~p~~P~~resident~~ shall be a member of the committee, ~~ex-~~officio, voting. Committee members may include individuals who are not trustees so long as the majority membership of the committee is comprised of trustees. The Chair shall have the authority to appoint non-trustee members advisory, nonvoting to the committee to serve until the next annual meeting. Members may be appointed to the committee on a temporary basis, by the Chair, as may be required.

Staff Designee:

The vice president for ~~a~~A~~dvancement~~ is the senior staff member supporting the committee for ~~a~~A~~dvancement~~ and SSU Alumni Association and Foundation matters.

Meetings:

The committee is expected to meet at least four times each academic year. Frequency and timing of meetings shall be determined by the chair of the Board of Trustees. Meetings shall be conducted in compliance with the state's Open Meeting Law. Executive sessions may be conducted periodically and shall be limited to those matters permitted by the state's Open Meeting Law.

Agenda, Minutes, and Reports

The chair of the committee, in collaboration with the staff designee(~~s~~), shall be responsible for establishing the agendas for meetings. An agenda, together with relevant materials shall be made available to committee members at least five days in advance of the meeting. Minutes for all meetings shall be drafted by the staff designee, reviewed by the committee chair, and approved by committee members at the following meeting.

REQUEST FOR TRUSTEE ACTION

Date: September 3, 2025
To: Board of Trustees
From: Advancement Committee
Subject: Revisions to the Naming Opportunities and Gift Recognition Policy
Requested Action: Approval

MOTION

The Advancement Committee hereby recommends that the Board of Trustees approve the following motion pertaining to the revised Naming Opportunities and Gift Recognition Policy attached.

Recommended motion

The Board of Trustees of Salem State University hereby approved the proposed revisions to the Naming Opportunities and Gift Recognition Policy as presented.

Committee Assigned: Advancement Committee

Committee Action: Approved

Date of Action: September 24, 2025

Trustee Action:

Trustee Approval Date: October 15, 2025

Effective Date: October 15, 2025

Signed: _____

Title: Secretary of Board of Trustees

Date: _____



University Administrative Policy

Policy Name: Naming Opportunities and Gift Recognition Policy

Responsible Office: Salem State University Board of Trustees

Originator of the Policy: ~~Office of~~ Advancement Office

Effective Date: 9/23/2013

Revision History: ~~2/12/2020~~ 7/7/14, 12/1/14, 12/14/15, 12/18/19, 1/29/20, 10/15/2025

Web Link: <https://records.salemstate.edu/policies>

1. Rationale

This policy (the "Policy") is designed to develop university-wide guidelines for gift naming opportunities and service recognition naming opportunities at Salem State University.

2. Statement of Policy

See end of document for the full policy.

3. Scope

This policy shall govern the administrative policy development process for all divisions, departments, and offices under the jurisdiction of the Board of Trustees.

4. Fiscal Considerations

	Direct Costs / Savings / Revenue Generation	Indirect Costs / Savings / Revenue Generation
Initial Implementation	None	None
Ongoing	None	None

5. Responsibilities

Responsible Party	List of Responsibilities
Salem State University Board of Trustees	Overall responsibility for assuring compliance with the requirements of this Policy relating to gift naming opportunities and service recognition naming opportunities.

Formatted: Header, Indent: Left: -0.08"

Formatted: Header, Centered

Formatted: Header, Right, Right: -0.08"

Formatted Table

Formatted: Header

6. Policy Enforcement

Violation(s)	It shall be a violation of this policy to promulgate any applicable policy or take any action in contravention of the requirements outlined herein.
Potential consequences	Any policy subject to the terms of the Policy on Administrative Policies not developed through the proper procedures outlined herein shall not be considered official Salem State University policy.
How to report	Contact designated policy officer

7. Reference Documents

Policy or Document	Web Address
Naming Opportunities and	https://records.salemstate.edu/policies
Gift Recognition	

8. Contact(s)

Subject	Office or Position	Telephone Number	Email
Policy Clarification	Cheryl Crounse Mandy Ray, Vice President, Institutional Advancement and Executive Director of the Salem State University Alumni Association and Foundation, Inc.	978.542.7591	ccrounse@saalemstate.edu mray@saalemstate.edu

9. **Effective Date:** Initiated September 23, 2013. Amended and restated as of ~~February 12, 2020~~ **October 15, 2025**.

10. **Dissemination:** Posted on the university ~~web site~~ [website](#).

11. **Review Cycle:** As necessary.

Formatted: Header, Indent: Left: -0.08"

Formatted: Header, Centered

Formatted: Header, Right, Right: -0.08"

Formatted Table

Formatted: Header



NAMING OPPORTUNITIES AND GIFT RECOGNITION GUIDELINES

FOR SALEM STATE UNIVERSITY

Responsible Office: ~~Office of Institutional Advancement~~ Office
Responsible Officer: Vice President, ~~Institutional Advancement~~

Approved by Salem State University:
September 23, 2013-
~~Amended and restated as of February 12, 2020.~~
Amended and restated as of October 15, 2025

(Supersedes all previously approved related documents)

Effective: ~~February 2020~~ October 2025

352 Lafayette Street, Salem, MA 01970
Telephone 978.542.7591

Formatted: Header, Indent: Left: -0.08"

Formatted: Header, Centered

Formatted: Header, Right, Right: -0.08"

Formatted Table

Formatted: Header

Salem State University Naming Opportunities and Gift Recognition Policy

Purpose

The purpose of this policy is to develop university-wide guidelines for gift naming opportunities and service recognition naming opportunities at Salem State University.

I. Introduction

Salem State University and the Salem State University [Alumni Association and Foundation, Inc. \(AAF\)](#), seek private funds to enhance the university's ability to meet the higher education needs of the community, particularly toward a level of excellence that would otherwise not be possible given state funding levels and restraints on student tuition and fees.

The ~~foundation~~ [AAF](#) and the university will provide appropriate recognition to donors for their generosity. Recognition may take many forms and this policy seeks to establish guidelines for the naming of facilities, programs and funds.

The opportunity to recognize an individual, a family, a foundation, or a corporation by naming a space on campus or naming a fund is a matter of common practice among the more than 5,000 institutions of higher education in the United States.

II. Policies and guidelines

The following are policies and guidelines for the naming of facilities, programs and funds. They are designed to accommodate unpredictable situations and donor expectations while keeping the Salem State mission and policies at the fore in making decisions.

All naming opportunities are negotiable, and the Salem State University [Alumni Association and Foundation, Inc.](#) recognizes that, notwithstanding this policy, the Board of Trustees of the university retains discretion to make exceptions or alter criteria or conditions as appropriate to the circumstances. There are innumerable ways the university may recognize an individual, a family, a foundation, or a corporation, just as there are many different types of contributions that are made.

General guidelines:

- The naming of any physical facility, campus grounds or academic program is usually only appropriate when a significant contribution has been received.
- Donor recognition does not need to be tied directly to a gift for that specific building or improvement, academic unit or endowment.
- Significant unrestricted gifts can be recognized through naming opportunities.
- MSCBA bonded projects that are supported by student usage fees (residence hall, for example) bear minimal direct cost to the university. Therefore donors who support such projects may make their gifts 'unrestricted' to the university.
- The naming of buildings owned by the Division of Capital Asset Management and Maintenance (DCAMM) may require approval from the Board of Higher Education.
- The merits of naming any physical facility, space, academic program, or endowed fund should be determined by carefully weighing a person's high scholarship, devotion or distinguished service, and should be able to stand the test of time. Naming opportunities should be valued based on benchmarks, taking into consideration historical value and location of space.
- Signage for naming opportunities could take up to six months to install.
- The minimum amount required to establish a named endowed fund is \$50,000. This policy, which pertains to scholarship funds and other similar student, faculty and program support funds, was instituted on March 26, 2007. Endowment funds with lower levels were established prior to this and are grandfathered as endowed funds.

Implemented on 9/23/13

Revision history: 7/7/14, 12/1/14, 12/14/15, 12/18/19, 1/29/20, [10/15/25](#)

4

Salem State University

Naming Opportunities and Gift Recognition Policy

- Donors may wish to establish a named temporary fund for faculty support, financial aid or other funding priorities. Under such an agreement, the donor commits to providing an annual gift equivalent to the income from an endowment for a fixed period of time, at a minimum of three years.
- All naming requests should support the honoree's or donor's intent to meet the highest values and societal standards.

III. Types of gifts for naming commitments

Any and all combinations of gifts and pledges are acceptable for naming commitments. A naming opportunity may, be accepted for existing, unnamed opportunities not requiring major remodeling or renovation.

IV. Guidelines for naming physical facilities

- Buildings, campus grounds or other campus facilities will generally not be named for individuals currently employed by the university, unless a donor provides a sufficient gift in honor of that individual.
- When the person to be honored is living and no financial gift is being provided, at least three years should pass since any formal association with Salem State. Such affiliation includes time spent as a student, a compensated member of the faculty or staff, a volunteer board member, or a devoted public servant.
- Naming a building, wing, room, or lecture hall can be difficult, depending on size, age, prestige, location, original cost, etc. Recommendations on naming values are made by the vice president of ~~institutional~~ advancement, or his or her designee, in concert with the president and senior administrators, with ultimate review/approval from the Board of Trustees.
 - Facilities, rooms, and grounds built by MSCBA, DCAMM or that are university owned and operated can be named and funds may be directed by the donor or honoree for the benefit of Salem State University.
 - Unscheduled or unplanned facilities that a donor proposes to have constructed will require a 100 percent gift commitment, plus a fully endowed maintenance fund.

V. Guidelines for naming programs

In order to name a center, program or academic unit, the gift should be proportional to the amount of endowment (for example, principal times 4 percent annual payout, in accordance with the ~~foundation's~~ AAF's spending policy at the time of this vote) that would be necessary to sustain or propel the program to new heights on a permanent basis.

However, if an academic program is being named for someone of unparalleled scholarly distinction, that name should bring great honor as well as "promise" to the program, so that the naming is a value-added act of good will and thoughtfulness, as well as a magnet for additional financial resources.

Opportunities also exist to establish named endowment funds in support of faculty, student or academic priorities.

VI. Approval process for naming of facilities or programs

All permanently named facilities and programs of \$100,001 or greater value should be reviewed and approved by the president of the university, Board of Trustees, upon the recommendation of the vice president of ~~institutional~~ advancement in concert with the SSU ~~Foundation~~ AAF, where appropriate, and ultimately subject to the approval requirements listed below. Gifts of \$100,000 or less are recommended by the vice president of ~~institutional~~ advancement to the university president for approval.

Implemented on 9/23/13

Revision history: 7/7/14, 12/1/14, 12/14/15, 12/18/19, 1/29/20, 10/15/25

5

Salem State University Naming Opportunities and Gift Recognition Policy

The executive director of the Salem State University [Alumni Association and Foundation, Inc.](#) has the authority to review and approve names of support funds, such as scholarship endowments, on behalf of the ~~foundation~~[AAF](#).

The following principles shall be fully adhered to in the naming process:

- All proposed names for buildings and other facilities are held confidential during the review and approval process. There should be a minimum of communication about the proposed naming before appropriate approval has been granted.
- The university is responsible for maintaining a record of named rooms, buildings, grounds, and other spaces, in addition to endowed funds.
- Naming commitments and, in fact, all major gifts, whether recognized by naming rights or not, are reflections on the values and reputation of Salem State University. Accordingly, each gift and naming commitment should be reviewed carefully for full compliance with applicable laws and ethical principles. This is especially true where there is some direct or indirect business or other continuing relationship between the donor and the university, its officers or employees. Any questions about the applicability of state or federal laws on conflicts of interest and other ethical considerations should be referred to appropriate legal counsel.
- Once the naming opportunity is approved at all required levels, a formal gift agreement is executed by the ~~foundation~~[AAF](#), outlining parameters of the gift in support of the university (as well as the nature of the named recognition).
- Recognition steps are then set in motion, including appropriate media announcements, signage installation, campus ceremonies, etc. (consistent with the wishes of the donor, the level of support he/she is providing, and the university's recognition ceremony guidelines). It is important to note that, throughout the review and approval process, the donor's intentions should be held in strict confidence.

VII. Timeframe for pledge gifts

Endowed gifts have five years to reach the minimum endowment funding level of \$50,000. For endowment pledges that do not reach the minimum level within the five-year period, the donor or representative of the gift will be consulted to determine the most useful course of action, which may include a pledge extension or the transfer of the fund to the unrestricted endowment fund.

Naming will take place once a minimum of 51% of the pledge is fulfilled. In the event the pledge of cash (including, but not limited to charitable gift annuities), by a donor is not fulfilled in accordance with the signed letter of intent, the university reserves the right to ask the donor(s), or his or her representative, to forfeit the naming opportunity at Salem State University. Deferred pledge agreements or bequests will not be recognized with a naming.

VIII. Termination of naming agreement

The university may terminate an agreement and all rights and benefits of the donor(s) or honoree(s), including terminating the naming, in the unlikely event the university determines in its reasonable and good faith opinion that circumstances have changed such that the naming chosen would inflict damage to the university's reputation, standing, or integrity, or be contrary to university values

Implemented on 9/23/13

Revision history: 7/7/14, 12/1/14, 12/14/15, 12/18/19, 1/29/20, [10/15/25](#)

6

Salem State University Naming Opportunities and Gift Recognition Policy

Upon such termination of agreement and/or the naming, the university and the ~~foundation-AAF~~ have no obligation or liability to the donors and are not required to return any portion of the gift already paid. The president and the ~~foundation-AAF~~ may, however, have discretion on determining an alternative recognition for the portion of the gift already received, if appropriate.

Also, if a named ~~space~~ is ever transferred or conveyed from the university, closed, deconstructed, destroyed or severely damaged, relocated, or replaced, then the naming will cease. In addition, if the named space is ever significantly renovated, upgraded or modified at a significant cost to the university then the naming will cease.

In such event, however, the Board of Trustees for gifts of \$100,001 and the president for all gifts under \$100,000, will have the right, for no additional payment, to designate the name of another available and equivalent university facility related to the purpose of the original gift intent. If the original donors are living and competent, they would be consulted by the university to discuss mutually agreed upon space. All naming right agreements will provide for termination detail as outlined in the above policy.

IX. Approval and review of this policy

The naming opportunities and gift recognition policy is reviewed with the Board of Trustees and Alumni Association and Foundation Board of Directors as new fundraising plans are initiated for a campaign, when specific fundraising initiatives are launched or as the vice president of ~~institutional~~ advancement or university president deem necessary. Revisions to the policy are subject to approval by a vote of the Board of Trustees.

Implemented on 9/23/13

Revision history: 7/7/14, 12/1/14, 12/14/15, 12/18/19, 1/29/20, 10/15/25

7

Salem State University
Naming Opportunities and Gift Recognition Policy

A1. ADDENDUM: Guidelines for installing and naming campus benches

Addendum approved by the President for inclusion on December 14, 2015

Bench naming opportunities are to be sited as donor wishes arise, rather than mapping out the full campus in advance. Bench naming opportunities are offered at two gift levels according to the below standard operating procedures. Below gift levels are suggested at several times the anticipated cost of purchase/installation in order to direct funds to three places: (1) bench purchase/installation including dedicatory plaque, (2) the donor's programmatic interest, and (3) a maintenance fund to be created.

1. Custom design new bench – \$100,001 gift or greater
 - Designed in consultation with landscape architect for the existing space
 - Named in perpetuity, with university committing to lifetime maintenance
 - University retains right to remove or relocate as needed but pledges to consult with donor first (this would likely only happen in the event of major construction on the bench site)
2. Standard design new bench – \$50,000 gift or greater
 - Follows standard design appropriate to that campus' architectural vernacular as determined by Facilities (e.g. for North Campus, this would be the wooden benches lining the library quadrangle; Central Campus would be similar, but likely somewhat different)
 - Tribute expires with the life of the bench, a minimum of 10 years; university will pay for maintenance and one replacement, if needed, within the 10-year window
 - At tribute expiration, donor has right of first refusal to renew at current full Tier Two rate
 - University retains right to remove or relocate bench as needed

Implemented on 9/23/13

Revision history: 7/7/14, 12/1/14, 12/14/15, 12/18/19, 1/29/20, [10/15/25](#)

8



Advancement Brief

The primary focus of the September 24, 2025 advancement committee meeting will be to provide the Board of Trustees with an update on the *Meet the Moment*® campaign. In addition, the committee will conduct its annual charter review and consider a proposed update to the university's naming and recognition policy.

Enclosed is a report detailing the work completed between July 1, 2024, and June 30, 2025. The efforts of the Alumni Association and Foundation and the advancement division have been aligned with the *Meeting the Moment* SSU Strategic Plan, highlighting the campaign's ongoing impact.

Highlights from Advancement FY25 Annual Report:

The sixth year of the *Meet the Moment*® (MTM) campaign continued its momentum, adding \$5,144,778 in fiscal year 2025 to reach a total of \$59,490,322 raised, representing 79 percent of the \$75 million goal. To date, 7,751 dedicated alumni and friends have made 17,653 donations to provide essential support for Salem State's core priorities. Notably, the \$20 million goal earmarked for student financial assistance has been surpassed, with \$29.5 million raised; likewise, the \$30 million endowment fundraising goal for the campaign is nearly met, with \$29.9 million raised to date—bringing the university's total endowment market value to \$77.8 million.

Salem State's community of supporters expanded once again, with 784 new donors added this year. Our work of engaging and retaining donors continues to reap rewards, with 44 percent of donors retained in fiscal year 2025, a five percent increase in retention from fiscal year 2024.

Since July 2012, 1,087 students from 33 majors received donor-funded internship scholarships. In FY25, a total of \$2,153,610 was raised in support of student financial assistance. With a keen focus on internship scholarships, we were successful in raising \$286,970 for this experiential learning opportunity through outreach efforts. We are pleased to share those 40 students benefited from internship scholarships this year.

In FY25, the advancement team significantly expanded alumni and donor engagement through a variety of regional and on-campus events, communications and publications. We executed 68 virtual and in-person events this year including six regional FEC/engagement events and AAF sponsored 12 events. Regional engagement events were hosted in Worcester; Washington, D.C.; Naples, Fla.; San Diego; Los Angeles; and San Francisco, allowing the university to connect with alumni and supporters across the country. On campus, the Athletic Hall of Fame

held in April drew a capacity crowd of nearly 200, while other signature spring events included the Educator Pinning Ceremony, Veterans Stole Ceremony, Viking Warrior Day, and Alumni Weekend—each contributing to a vibrant and connected campus community.

The advancement team issued 14 press releases and produced 13 episodes of the *It Takes a Viking* podcast, showcasing voices and stories from across the SSU community. Additionally, three major publications were produced and distributed over the year: the *Annual Giving Impact Report* in September, *Your Impact in Action* in December, and the *Salem Statement* in June. These materials helped keep stakeholders informed, engaged and connected to the university's mission and impact.

Since the commencement of our campaign, 1,790 students have experienced increasing benefits from donor-supported financial assistance, notably through Viking Completion Grants (252) and the Student Emergency Fund (902), which provides critical support to our food and housing insecure students. Additionally, two new scholarships were established in FY25. This year, \$4,695,265 was transferred to the university.

Since 2019, we have raised \$2,915,809 for SSU BOLD. This year, we celebrated a \$1 million lead gift for SSU BOLD from alumna Midge DeSimone '76 and Tom DeSimone. Advancement continues to build partnerships with supporters in the science, healthcare and biotech industries to secure gifts toward this fundraising priority. Capitalizing on the SSU BOLD groundbreaking in April 2025, the advancement team is actively advancing its SSU BOLD campaign with several key efforts underway.

Viking Warrior Day 2025 was successfully hosted in May as a university-wide effort involving multiple departments around campus. Notably, athletic teams made a friendly competition out of this year's giving day resulting in nearly \$27,000 in support for their programs. The event exceeded expectations, raising \$367,219 and significantly increasing donor participation—from a previous 534 to 876 donors—demonstrating strong community engagement and momentum for future fundraising initiatives.

Event Save the Dates:

Educator Hall of Fame Celebration - November 13, 2025

Scholar and Donor Celebration – November 19, 2025 at 6 pm

Boards Holiday Party – December 10, 2025 at 6 pm

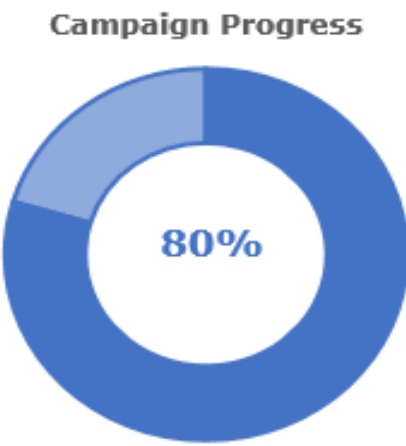
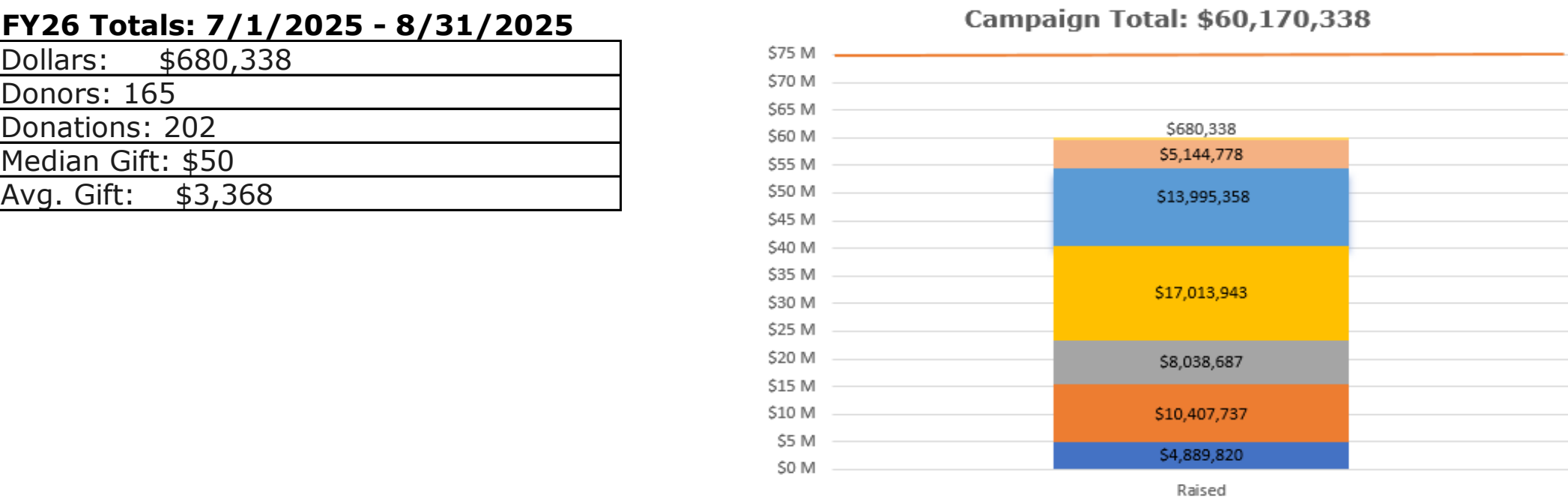
Attachment: August 2025 Fundraising Dashboard

Monthly Fundraising Dashboard Fiscal Year 2026

August 31, 2025

FY26 Totals: 7/1/2025 - 8/31/2025

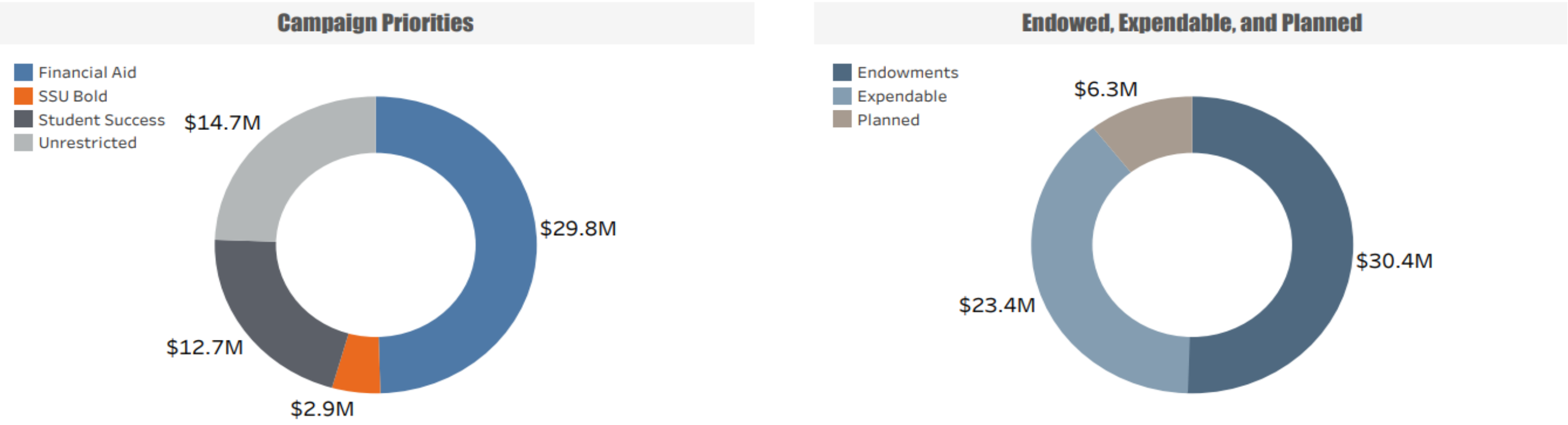
Dollars:	\$680,338
Donors:	165
Donations:	202
Median Gift:	\$50
Avg. Gift:	\$3,368



Donors	Donor Base FY25	Donors Retained	% Retained
Retained from previous year	2,321	109	5%

Total: \$60,170,660

Fundraising Analytics



University Fundraising Priority	Goal	Total Raised	Balance	% to Goal
Financial Aid	\$20,000,000	\$29,816,507	-\$9,816,507	149%
Student Success	\$25,000,000	\$12,732,480	\$12,267,520	51%
SSU BOLD	\$10,000,000	\$2,915,809	\$7,084,191	29%
Unrestricted	\$20,000,000	\$14,705,864	\$5,294,136	74%
Campaign totals	\$75,000,000	\$60,170,660	\$14,829,340	80%

Gift Type	Goal	Total Raised	Balance	% to Goal
Endowment	\$30,000,000	\$30,408,653	(\$408,653)	101%
Spendable	\$30,000,000	\$23,427,107	\$6,572,893	78%
Planned Gifts	\$15,000,000	\$6,334,900	\$8,665,100	42%
Total	\$75,000,000	\$60,170,660	\$14,829,340	80%

Board Giving

Volunteer Board	Total Campaign Giving	Annual Unrestricted FY26 Participation
Board of Trustees	\$3,646,800	0%
AAF Board	\$8,251,611	4%
Campaign II Steering Committee	\$10,476,654	0%