



**SPECIAL MEETING OF THE BOARD OF TRUSTEES
Including the Salem State University Foundation Board of Directors**

September 25, 2019

PRESENT: Trustees Mattera (chair), Zahlaway-Belsito, Butts, Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Wilkens and Trustee Emeritus Segal. Also participating at the meeting were President Keenan and Board Secretary Montague and Assistant Secretary Hennessey.

ABSENT: None

Present for the Salem State Foundation Board of Directors: Ms. Deschamps (president), Mr. Cavanaugh, Ms. Chisholm, Mr. Cicolini, Ms. Di Palma, Mr. George, Ms. Liftman, Ms. Katzman, Mr. Petrowski, Ms. Ricciardiello, Ms. Gassett-Schiller, Mr. Segal, Ms. Skrabut, Mr. Surface, Mr. Wamness, Mr. Young. Also present and participating in the meeting were Institutional Advancement Vice President Cheryl Crouse, AVP Mandy Ray, Director, Campaign, and Advancement Taylor Dunn, and Staff Associate, Senior Director of Development, Michael Randall, Senior Director, Advancement Services, Jeannie Patch and Senior Director, Foundation Controller, Nicole Bousquetto Executive Assistant to the VP Ms. Shahin.

ABSENT: R. Blazo, K. Reid

* * *

The provisions of General Laws, Chapter 30A, having been complied with and a quorum of the Board being present, the Board of Trustees of Salem State University held a special meeting in Viking Hall, room 123, located on Central Campus, Loring Avenue, Salem, Massachusetts, on September 25, 2019 with Paul Mattera, Chair, presiding.

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I. Call to Order - Chair Mattera called the meeting to order at 7:18 pm.

Call to Order

II. New Business - The purpose of this special meeting was to join with the Board of Directors of the Salem State University Foundation to discuss a potential comprehensive campaign. The meeting began with an introduction by Chair Mattera and Ms. Deschamps, President of the Foundation Board who presided over the meeting jointly. The shared goal for the evening was to hear from Marts & Lundy on their findings on the four phases of their work, which included: an internal readiness report, capacity analysis, feasibility study, and a constituent online survey.

New Business

Chair Mattera reviewed the meeting agenda and then turned to Vice President of Institutional Advancement (IA) Cheryl Crouse who introduced Kathy Howrigan and Richard Ammons of Marts & Lundy (M&L).

Howrigan began the presentation (attached) M&L was engaged to complete presentation of their findings. Ammons presented the internal assessment key findings including the current environment, leadership, campaign priorities and feedback on the prospectus. As a part of their assessment they provided an overview of the necessary resources to make a campaign successful including a recommendation on how to structurally organize for the campaign.

Howrigan provided a review of the capacity analysis. The capacity analysis indicated a possible campaign goal range of \$42M to \$54M which is significantly below the aspirant goal that Salem State put out to test with donors. They called for a desired increase of staff to meet these goals in particular in the major gifts area.

Trustee Butts questioned whether the level of the campaign, \$50M was determined by just the individuals prospects capacity or whether corporate matching gifts were considered when determining a campaign goal. Howrigan indicated that campaigns do not consider corporate matching as it is not considered a highly profitable revenue source. Howrigan then addressed the staffing analysis and said that currently seven IA staff members spend the equivalent of three FTEs on fundraising because of the mix of duties in their job descriptions that include management, leadership and oversight of the Foundation. M&L suggested they would like to see at least three new exclusively major gift fundraising staff added over the next two years while also increasing staff fundraising productivity.

Ammons reviewed the online survey results which addressed general attitudes and perceptions toward and satisfaction surrounding the university. It also addressed thoughts on a possible need for a future campaign and ideas on supporting the university through philanthropic giving. Results showed a consistent and positive attitude toward the university and its leadership including President Keenan. Faculty and staff responses differed from alumni responses. Several trends emerged including that several respondents ranked Salem State as a high philanthropic priority.

A number of questions and discussion followed the presentation. Trustee Butts questioned M&L about the amount and the direction of the campaign. Trustee Murphy questioned the methodology behind determining the amount for the campaign and the survey group. Ms. DiPalma followed up with a question regarding the capacity analysis. Trustee Katzman questioned if there was one suggestion that M&L what would offer to the Boards what would it be?

Howrigan and Ammons explained that one of the greatest challenges in speaking with prospective donors is generating and communicating transformational ideas and vision. Ammons suggested that there was strong support for the science labs but cautioned against using the project as a flagship for the campaign.

Trustee Chisholm noted that the study revealed a high number of prospects and that there is the challenge of stewarding those prospects if we still need to staff up IA. Howrigan agreed and moved on to articulate the studies overall recommendations and suggested that the boards should consider the university in a campaign and determine their top two or three priorities – the top prospects identified with: Financial aid, SSU Bold, Entrepreneurship, and Experiential learning. The leaders should also create key success indicators such as hire key staff for IA and raise at least sixty percent of their desired campaign goal before announcing the campaign publicly. Recommended we close at least two lead gifts toward the campaign priorities: at the \$25 million and \$10 million level.

Chair Mattera asked for clarification regarding the start of the campaign as the boards will vote in February on whether or not to begin a campaign. Secondly, is M&L suggesting that we not announce our campaign until we raise the first gifts and then that will inform the level of our campaign? Howrigan suggested that was correct and that M&L recommends a \$50M campaign working goal and then adjust upward. Richard suggested a two decision point. Cheryl suggested that the Advancement Team will develop the campaign plan with the assistance of Trustee Chisholm and Ms. Skrabut. Chair Mattera questioned that there will be work done and that Trustee

Russell questioned when staffing would be determined. Trustee Chisholm offered that staffing will be included in the campaign plan. President Keenan offered that the senior leadership realizes that some investment has to be made in the revenue driven positions.

Trustee Chisholm expressed concern regarding the lack of a flagship project. Trustee Katzman echoed the concern and Ammons suggested asking donors to share the vision.

Mr. Cicolini expressed concern regarding how the last campaign was funded and sent the Foundation into an anemic state. He suggested the Foundation would be establishing a gift fee to cover costs of the campaign operational budget. Ammons said M&L just completed a study on gift fees and they are common. The average fee is five percent and the majority of public institutions have them. Some institutions have a cap that makes sense for the institution.

Trustee DeSimone questioned whether the state was looking to see private philanthropy as part of the university's project. Vice President House confirmed that the state is looking to see private donors supporting the project. Trustee Segal asked whether our private support would lower our state allocation. President Keenan and Chair Mattera suggested insufficient funds from the private sector would ensure that we do not receive project funding.

Chair Mattera and Deschamps called the meeting to a close

* * *

III. Adjournment – There being no further business to come before the Board and on a motion duly made by Trustee Lutts and seconded by Trustee Katzman, it was unanimously

VOTED: to adjourn at 9:02 pm

Respectfully submitted,

Adjournment



John Keenan
President



Lynne Montague
Secretary to the Board of Trustees

A REPORT FOR:



Campaign Planning Study Report Executive Summary



Kathy L. Howrigan

Senior Consultant & Principal

Richard A. Ammons

Senior Consultant & Principal

Brian A. Zive

Consultant, Analytical Solutions

Overview

Salem State University Foundation engaged Marts & Lundy to undertake a Campaign Planning Study consisting of the following components:

1. Internal Assessment Report

The initial draft of the Internal Assessment Report was delivered to the University in May 2019 and provided nearly 40 recommendations related to vision, leadership, internal development operations, organizational structure and staffing, data systems, processes and procedures, alumni relations programs, development policies, and volunteer engagement.

The Development Assessment Report indicates that significant internal changes and adjustments must be made in several areas in order for Salem State to not only implement a successful campaign but also to build long-term sustainable philanthropic growth.

2. Capacity Analysis

The analysis identifies and sets priorities for a group of top prospects, adjusts their potential giving based on their financial capacity and their likelihood of giving, and identifies strengths and weaknesses at different gift levels.

The Capacity Analysis indicates a possible campaign goal range of \$42M to \$54M – significantly below the desired campaign target – and the need to hire at least three new fundraisers over the next two years while also increasing staff fundraising productivity.

3. Feasibility Study

Feasibility interviews for Salem State were designed to develop a detailed strategy for the proposed campaign; further the University's longer-term philanthropic potential through identification and cultivation of prospective leadership gift donors and campaign volunteers; gauge interest in current priorities; and surface any concerns regarding University leadership, governance, and performance.

The Feasibility Study indicates generally positive attitudes toward Salem State and its leadership, a lack of understanding and enthusiasm for the campaign priorities as articulated in the campaign prospectus, potentially low giving levels for key prospects, previous donors who seek better stewardship of gifts to the 10,000 Reasons campaign, concern about the size and timing for the campaign, high levels of engagement among a core group of prospects, and a potential pool of leadership campaign volunteers.

4. Online Survey

The Online Survey for Salem State was designed to test general attitudes toward and satisfaction surrounding the University, initial thoughts on a possible future campaign, general thoughts about supporting the University philanthropically, and basic attitudes toward philanthropy.

The Online Survey indicates that the constituents are eager to hear from and engage with the University and are generally positive towards the University and the campaign. Faculty and staff responses differed from alumni responses. Several trends emerged that can be applied to survey respondents – 176 of whom ranked Salem State as a high philanthropic priority – and the broader prospect pool. This underscores the need for cultivation with increased staffing and clear engagement/solicitation/stewardship plans.

Overall Recommendations

1. Create a detailed campaign timeline.
 - a. Starting immediately and continuing for up to two years, conduct an intense planning and action program to address issues outlined in the Development Assessment and Feasibility Study Reports.
 - b. Determine the two or three primary campaign funding priorities, such as scholarships, the Center for Entrepreneurial Activity, and interdisciplinary science and laboratory programming space¹, and the giving opportunities associated with each priority.
 - c. Re-draft the case for support to highlight the chosen priorities.
2. Create key success indicators to be met in order to launch a campaign.
 - a. Hire key staff across development functions (see [“Recommended Staffing and Organizational Chart”](#)).
 - b. Meet new development officer metrics for success as outlined in the Capacity Analysis.
 - c. Raise at least 60% of the desired campaign goal before the official public announcement, e.g., \$30M towards a \$50M goal.
 - d. Close at least two lead gifts of \$25M and \$10M toward campaign priorities to support a campaign goal of \$75M or \$100M.
3. Create strategic engagement plans for key constituencies and programs.
 - a. Include donor prospects at the highest level in discussions regarding the campaign priorities and donor roles in funding those priorities.
 - b. Bring together small groups of key prospects to hear about and comment on the case for support and its underlying priorities.
 - c. Create a comprehensive alumni engagement strategy and plan with appropriate staff and programmatic support and a focus on affinity programming versus regional programming.

¹ SSU should avoid publicly and broadly articulating the Science Teaching Renovation project as a defined fundraising priority without having clarity around exactly what the project will be, when it will occur, what the role of the Commonwealth is, and what it will cost.

- d. Create a comprehensive stewardship plan with appropriate staff and programmatic support.
4. Begin recruitment of campaign leadership.
 - a. Determine volunteer structure and leaders.
 - b. Determine key academics and staff to engage in campaign activities.
 - c. Create a training and engagement plan to enhance the fundraising capacity of the president, senior leaders, the Board of Trustees and the Foundation directors, and other volunteers.

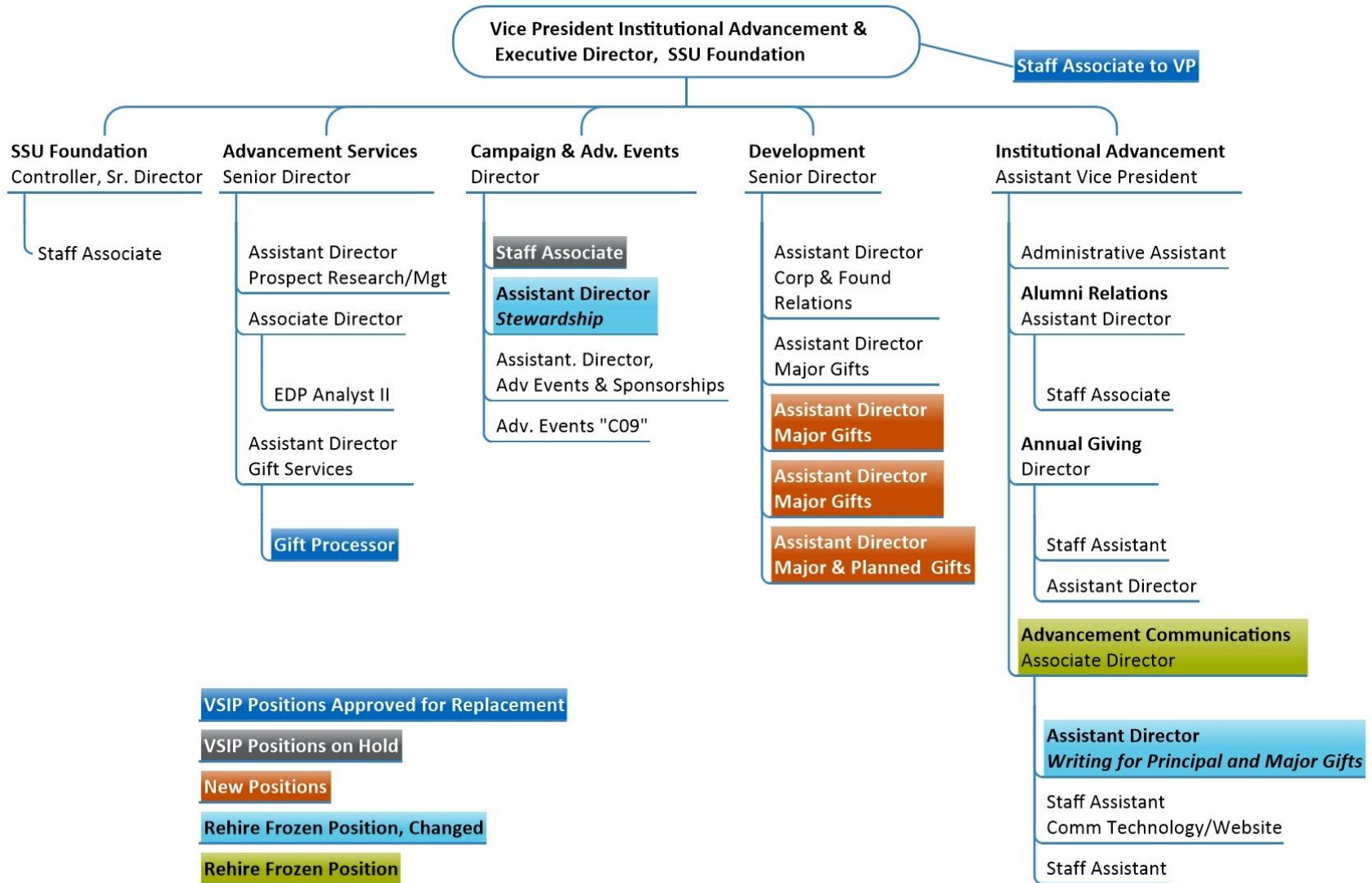
Recommended Staffing² and Organizational Chart

With the transition to new leadership, and using a campaign as an engine, the University should shift gears and upgrade the University's advancement staffing and infrastructure to:

1. Build a sustainable major and principal gift effort.
 - a. Add three additional development officer positions – two major gift officers and one hybrid major/planned giving officer.
 - b. Under the leadership of the vice president and senior development officer, build increased accountability for these gift officers by refining metrics for performance aligned with the Capacity Analysis and supported by additional training. Continue to leverage external support for prospect research as needed.
 - c. Strengthen donor relations/stewardship activities. Unfreeze the stewardship assistant position and upgrade to assistant director, stewardship, with a reporting line to the director of campaign and advancement events.
2. Build a stronger advancement communications agenda to support the campaign and complement broader University communications efforts.
 - a. Unfreeze and recruit for the associate director of advancement communications position.
 - b. Unfreeze the assistant director for advancement communications position and fill the position with a development writer with a focus on major and principal gift proposals and stewardship.
 - c. Position the annual fund to be a strong component of the campaign effort in order to identify and cultivate future major gift donors and build an overall culture of philanthropy.

² There are significant resource and staffing limitations that will occur because of the voluntary separation incentive program (VSIP). These vacancies will cause some disruption to the operations of advancement, with a likely impact on productivity levels.

Proposed Organization Chart



Salem State University Campaign Planning Study



Kathy L. Howrigan

Senior Consultant & Principal

Richard Ammons

Senior Consultant & Principal

Brian A. Zive

Consultant, Analytical Solutions

A PRESENTATION BY

Marts&Lundy

Overview

- Salem State University Foundation engaged Marts & Lundy to undertake a Campaign Planning Study consisting of the following components:
 - Internal Assessment Report
 - Capacity Analysis
 - Feasibility Study
 - Online Survey

Internal Assessment Key Findings

History and Current Environment

- Salem State and its faculty are deeply committed to its students.
- Salem State is seen as a regional resource for economic development on the North Shore.
- The recent union contract stalemate has raised on-campus tension.
- Lower student body size due to demographic shifts has brought budgetary strains.
- Successful *10,000 Reasons* campaign raised needed financial resources and built a culture of philanthropy throughout the University.

Leadership

- President John Keenan is well-regarded as an energized leader, relationship builder, and strong spokesperson for the University.
- The University is in the midst of a transition in the Advancement office.
- The new VP brings a strong record of leadership, management, and major gift fundraising and enjoys the confidence of the president and University leadership.
- The Board of Trustees and Foundation Board are invested in the campaign's success.

Campaign Priorities/Case for Support

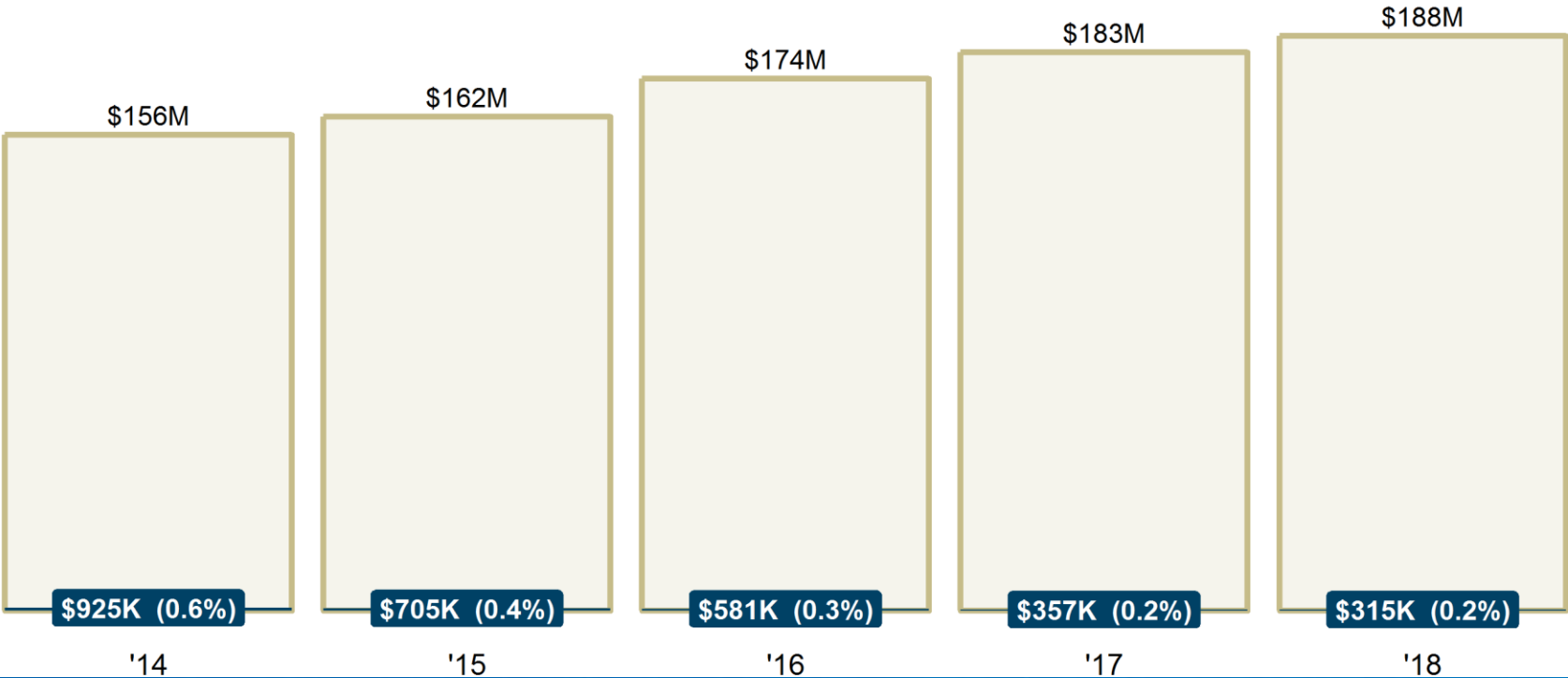
- Buy-in is needed across the University regarding campaign priorities.
- Salem State currently lacks the expertise and bandwidth needed to fully staff communications for a successful campaign.
- The Science Teaching Renovation project is an institutional priority that will likely become a campaign priority once it is more clearly defined.

Advancement Infrastructure

- The staff is deeply committed to Salem State's mission.
- Many on the team have experienced a campaign.
- There are significant resource and staffing limitations, including imminent vacancies.
- There is a need for more strategic thinking and less “putting out fires” with ad-hoc fundraising needs.
- There is a need for staffing review including organizational design, performance metrics, and potential training needs.
- Major giving and planned giving are underutilized activities at Salem State.

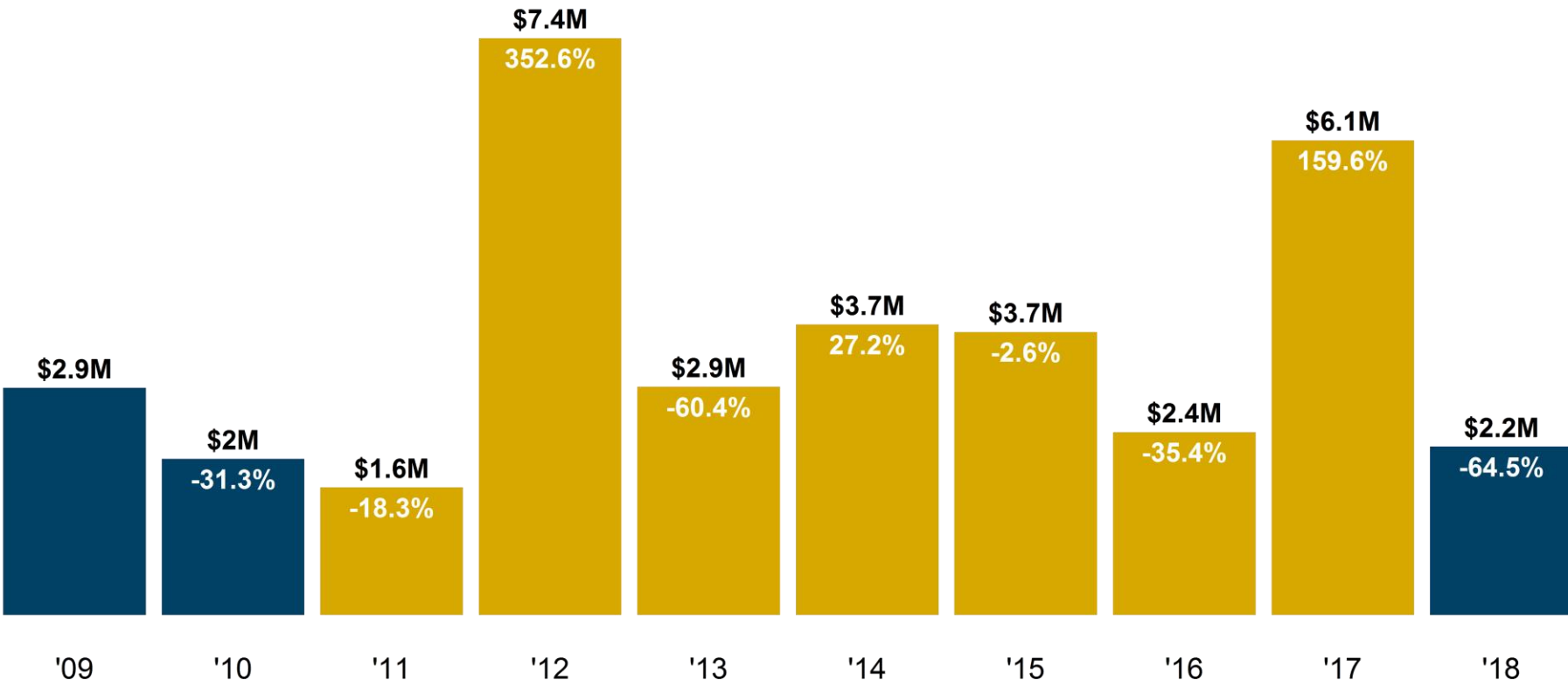
Endowment Revenue as a Portion of Institutional Expenses

- Endowment has grown by nearly \$7M or 30% since FY14.
- Institutional expenses have grown by \$32M or 20% since FY14.
- SSU has *decreased* its use of the endowment to fund its operations.



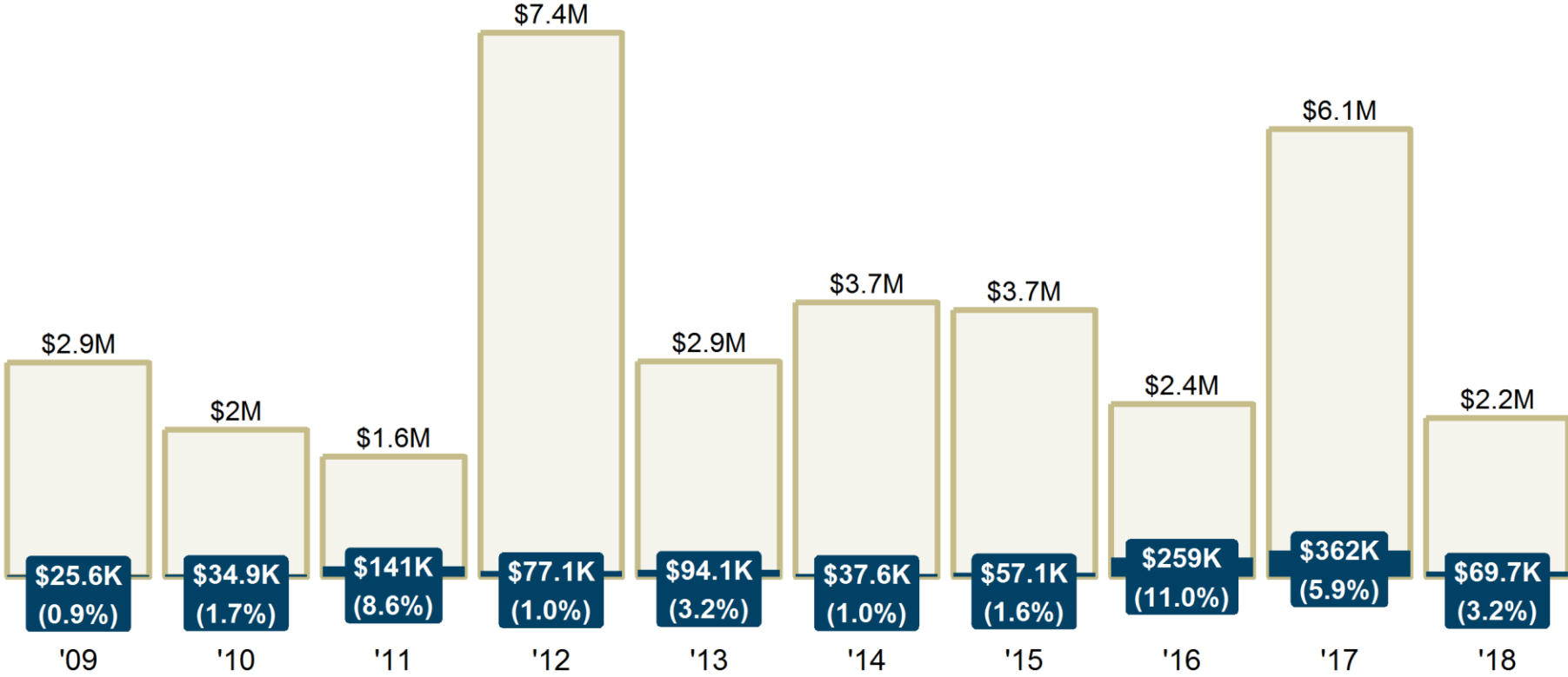
Total Revenue

10,000 Reasons campaign years are highlighted in yellow.

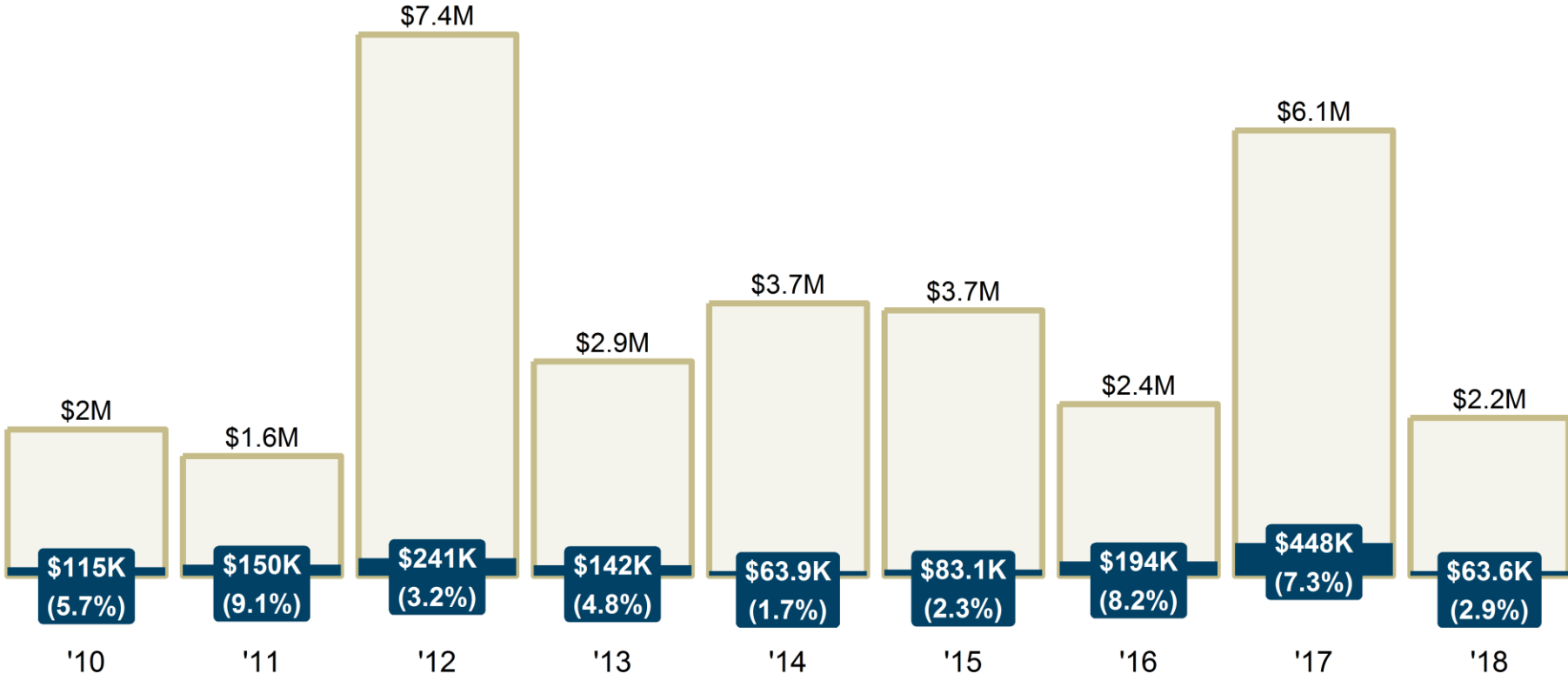


Portion of Overall Giving Credited to Board of Trustees

Board giving increased during campaign periods.



Portion of Overall Giving Credited to Foundation Board of Directors



Capacity Analysis

Capacity Analysis Methodology



Baseline Projection

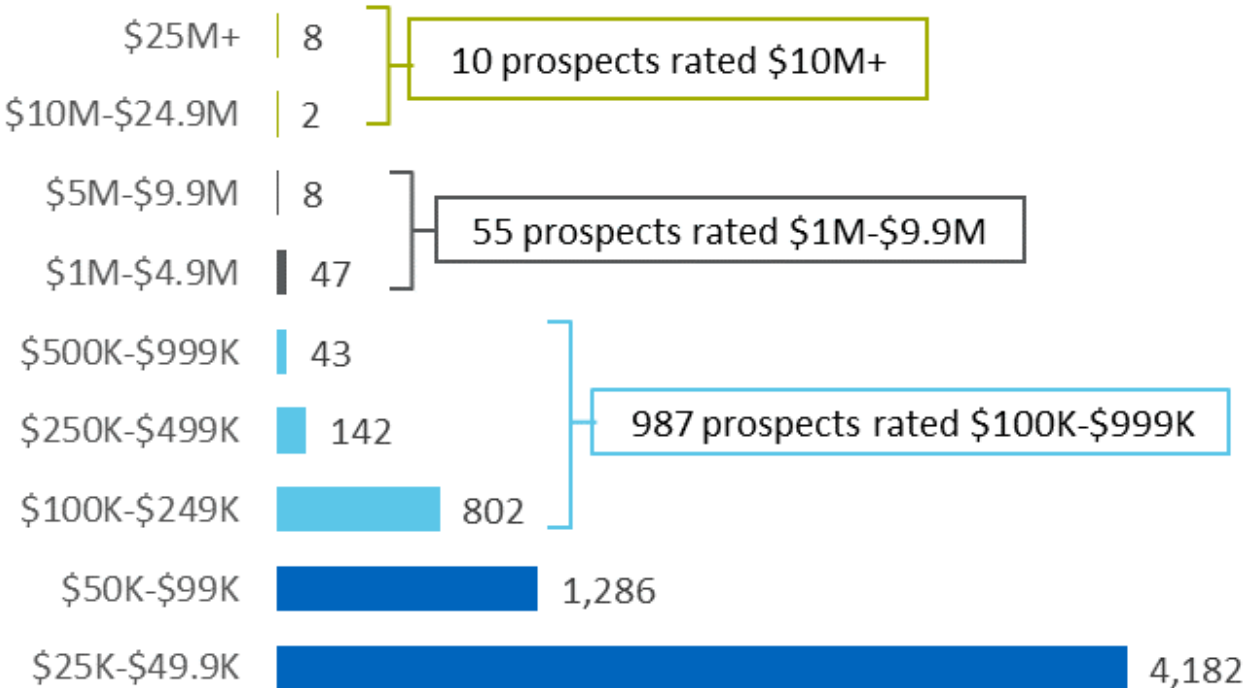
Marts & Lundy projects a **cumulative baseline total of \$7.9 million over the course of five years.**

Forecasted Five-Year Baseline		
Category	Forecasted Total	Annual Average
Individuals below \$25,000	\$4,282,860	\$856,570
Organizations	\$3,060,645	\$612,130
Gifts in Kind	\$260,280	\$52,060
Realized Bequests	\$250,920	\$50,060
Total	\$7,854,705	\$1,570,820

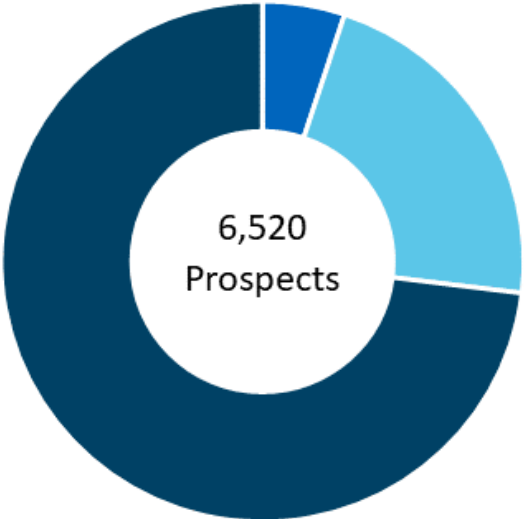
Prospect Segmentation

Major Gift Prospect Financial Capacity

Salem State has 6,520 prospects with major gift capacity, including 65 prospects with major gift capacity of at least \$1 million.



Prospect Segmentation – By Affinity

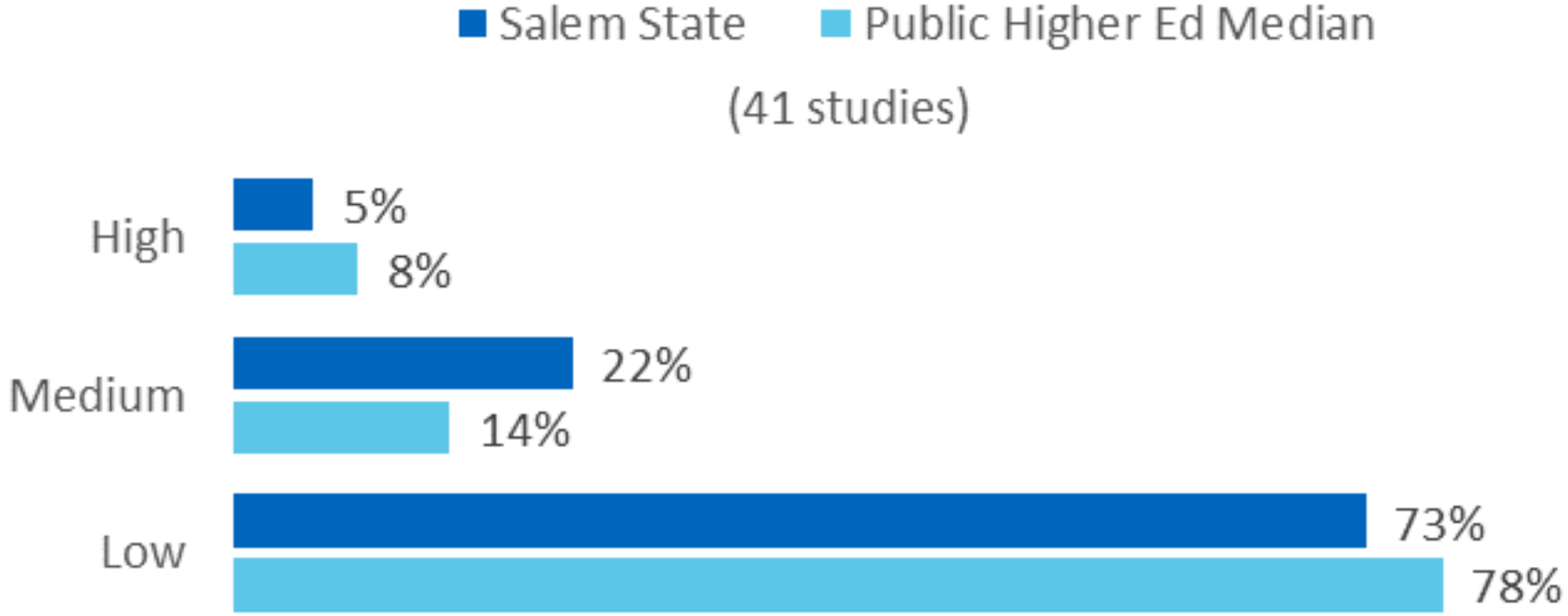


Likelihood

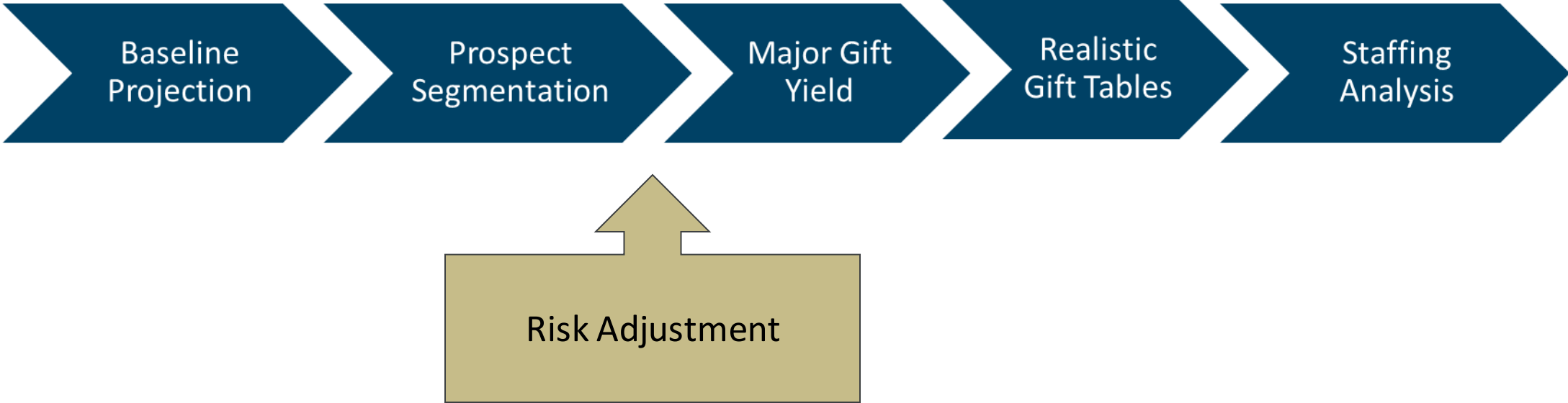
High	332	5%
Medium	1,424	22%
Low	4,764	73%

Prospects by Capacity and Likelihood				
Capacity	Prospects	Likelihood		
		High	Medium	Low
\$25M+	8	3	0	5
\$10M-\$24.9M	2	0	0	2
\$5M-\$9.9M	8	0	1	7
\$1M-\$4.9M	47	8	10	29
\$500K-\$999K	43	5	7	31
\$250K-\$499K	142	25	20	97
\$100K-\$249K	802	53	158	591
\$50K-\$99K	1,286	34	153	1,099
\$25K-\$49.9K	4,182	204	1,075	2,903
Total	6,520	332	1,424	4,764

Prospect Segmentation Benchmarking



Capacity Analysis Methodology



Risk Adjustment

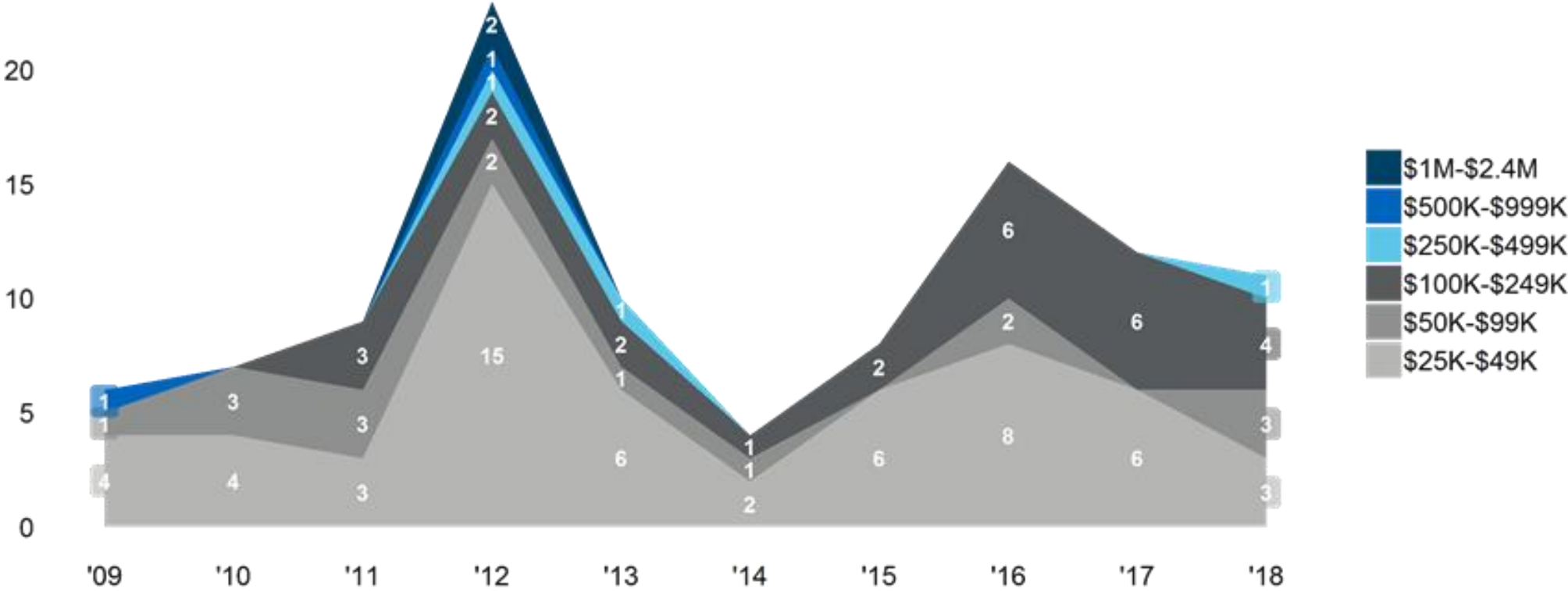
Prospects	Aggregate Base Capacity
6,520	\$613.05M



How much of this will you capture?

Risk Adjustment			
Prospect Likelihood	Prospects	Conversion Rate	Full Donor Equivalent
High	332	25%	83.00
Medium	1,424	5%	71.20
Low	4,764	1%	47.64
Total	6,520		201.84

Risk Adjustment



Projected Major Gift Yield

Marts & Lundy projects a potential individual major gift yield of \$34.0 million to \$45.9 million over the course of a campaign.

Projected Major Gift Yield				
Capacity	Prospects	Full Donor Equivalent	Low Yield	High Yield
\$25M+	8	0.80	\$20.00M	\$20.00M
\$10M-\$24.9M	2	0.02	\$0.20M	\$0.35M
\$5M-\$9.9M	8	0.12	\$0.60M	\$0.90M
\$1M-\$4.9M	47	2.79	\$2.79M	\$8.37M
\$500K-\$999K	43	1.91	\$0.96M	\$1.43M
\$250K-\$499K	142	8.22	\$2.06M	\$3.08M
\$100K-\$249K	802	27.06	\$2.71M	\$4.74M
\$50K-\$99.9K	1,286	27.14	\$1.36M	\$2.04M
\$25K-\$49.9K	4,182	133.78	\$3.34M	\$5.02M
Total	6,520	201.84	\$34.01M	\$45.92M

Products and totals may not equal the sum or product of their parts due to rounding.

Total Campaign Yield

The Capacity Analysis suggests that over the course of a five-year campaign, **Salem State could raise between \$41.9 million and \$53.8 million.**

Forecasted Five-Year Campaign Yield		
	Low Yield	High Yield
Major Gift Yield	\$34.0M	\$45.9M
Baseline Gifts Projection	\$7.9M	\$7.9M
Projected Comprehensive Total	\$41.9M	\$53.8M
Percent of \$100M Aspirational Goal	42%	54%
Percent of \$75M Aspirational Goal	56%	72%

Realistic Gift Tables and Gift Pyramids

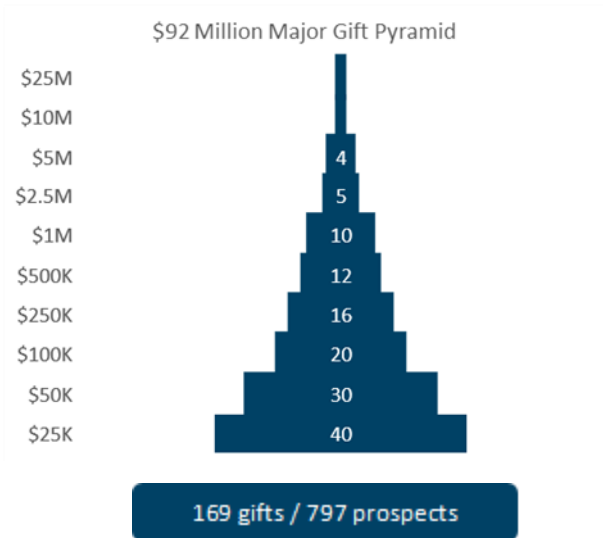
\$50M
Campaign
Pyramids



\$75M
Campaign
Pyramids



\$100M
Campaign Pyramid



\$42M Broad Gift Table (\$50M Campaign)

\$42 Million Broad Gift Table (\$50 Million Campaign)							
Gift Level	Gifts Needed	Prospects Needed	Prospects Identified	Prospect Surplus	Total	Cumulative Total	Cumulative % of Total
\$10M*	1	3	10	7	\$10.0M	\$10.0M	24%
\$5M	1	3	8	5	\$5.0M	\$15.0M	36%
\$2.5M^	1	3	47	26	\$2.5M	\$17.5M	42%
\$1M^	6	18			\$6.0M	\$23.5M	56%
\$500K	10	50	43	-7	\$5.0M	\$28.5M	68%
\$250K	18	90	142	52	\$4.5M	\$33.0M	79%
\$100K	40	200	802	602	\$4.0M	\$37.0M	88%
\$50K	60	300	1,286	986	\$3.0M	\$40.0M	95%
\$25K	80	400	4,182	3,782	\$2.0M	\$42.0M	100%
Total	217	1,067	6,520	5,453	\$42.0M	\$42.0M	100%

*Prospects identified at this gift level include all prospects with capacity of at least \$10 million.

^Prospects with capacity of \$1M-\$4.9M are shared at these gift levels.

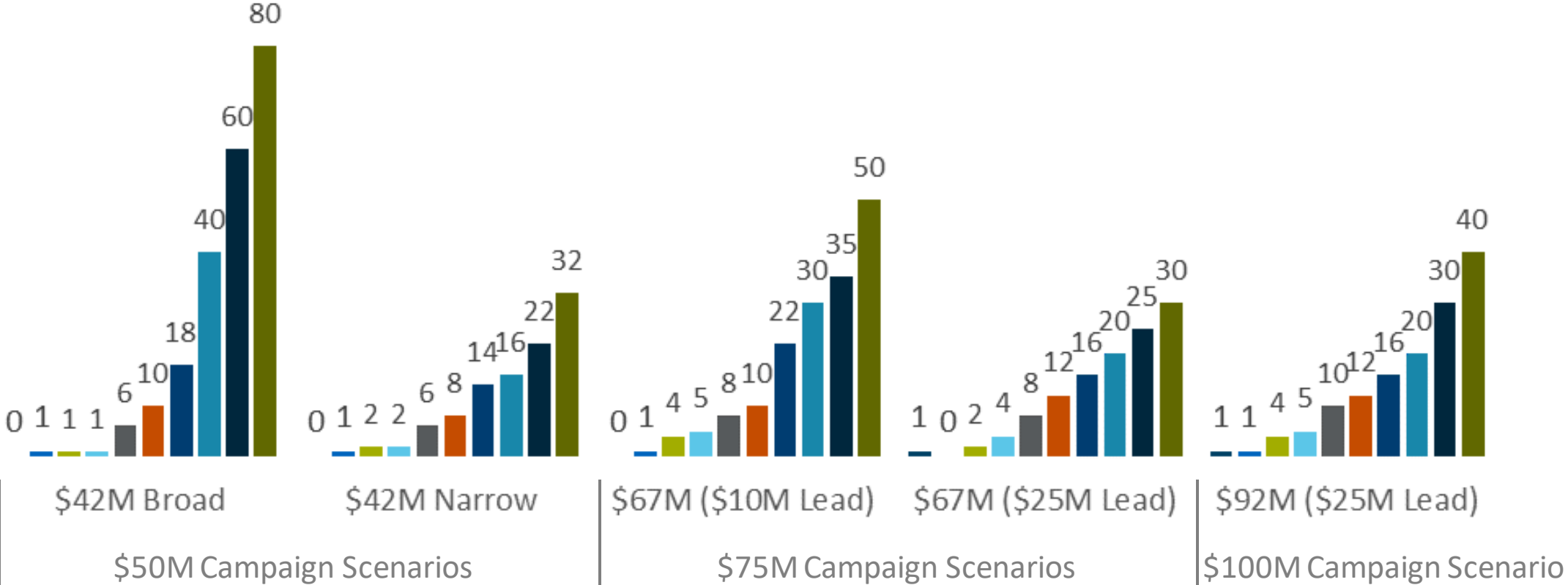
\$92M Gift Table (\$100M Campaign)

\$92 Million Gift Table (\$100 Million Campaign)							
Gift Level	Gifts Needed	Prospects Needed	Prospects Identified	Prospect Surplus	Total	Cumulative Total	Cumulative % of Total
\$25M	1	3	8	5	\$25.0M	\$25.0M	27%
\$10M	1	3	2	-1	\$10.0M	\$35.0M	38%
\$5M	4	12	8	-4	\$20.0M	\$55.0M	60%
\$2.5M^	5	15	47	2	\$12.5M	\$67.5M	73%
\$1M^	10	30			\$10.0M	\$77.5M	84%
\$500K	12	60	43	-17	\$6.0M	\$83.5M	91%
\$250K	16	80	142	62	\$4.0M	\$87.5M	95%
\$100K	20	100	802	702	\$2.0M	\$89.5M	97%
\$50K	30	150	1,286	1,136	\$1.5M	\$91.0M	99%
\$25K	40	200	4,182	3,982	\$1.0M	\$92.0M	100%
Total	139	653	6,520	5,867	\$92.0M	\$92.0M	100%

^Prospects with capacity of \$1M-\$4.9M are shared at these gift levels.

Gifts Tables Summary

■ \$25M
 ■ \$10M
 ■ \$5M
 ■ \$2.5M
 ■ \$1M
 ■ \$500K
 ■ \$250K
 ■ \$100K
 ■ \$50K
 ■ \$25K



Gifts Tables Summary

Surplus/Shortfall of Prospects with High and Medium Likelihood by Gift Table						
Gift Level	Prospects with High & Medium Likelihood	\$42M Broad	\$42M Narrow	\$67M	\$67M Alt	\$92M
\$25M	3	-	-	-	0	0
\$10M	0	0	0	0	0	-3
\$5M	1	-2	-5	-11	-5	-11
\$2.5M	18	-3	-6	-21	-18	-27
\$1M						
\$500K	12	-38	-28	-38	-48	-48
\$250K	45	-45	-25	-65	-35	-35
\$100K	211	11	131	61	111	111
\$50K	187	-113	77	12	62	37
\$25K	1,279	879	1,119	1,029	1,129	1,079

Gifts Tables Summary

- Based on the known prospect pool *at this point in time*, there is a shortfall of prospects with high or medium likelihood at most gift levels.
- Engaging and cultivating prospects with medium and low likelihood is vital so that these prospects transition to higher levels of likelihood throughout the campaign.
- It will be necessary to identify new major gift prospects throughout the campaign.

Staffing Analysis

Salem State has seven staff members participating in some portion of frontline fundraising activity. These seven staff members spend the equivalent of three FTEs on fundraising.

Role	Productivity Assumptions			
	Portfolio Size	Visits per Month	Solicitations per Month	Closure Rate
Principal Gift Officers	75	5	1	75%
Experienced Major Gift Officers (2+ years in role)	125	12	1.5	40%
Less Experienced Major Gift Officers (<2 years in role)	100	10	1	33%

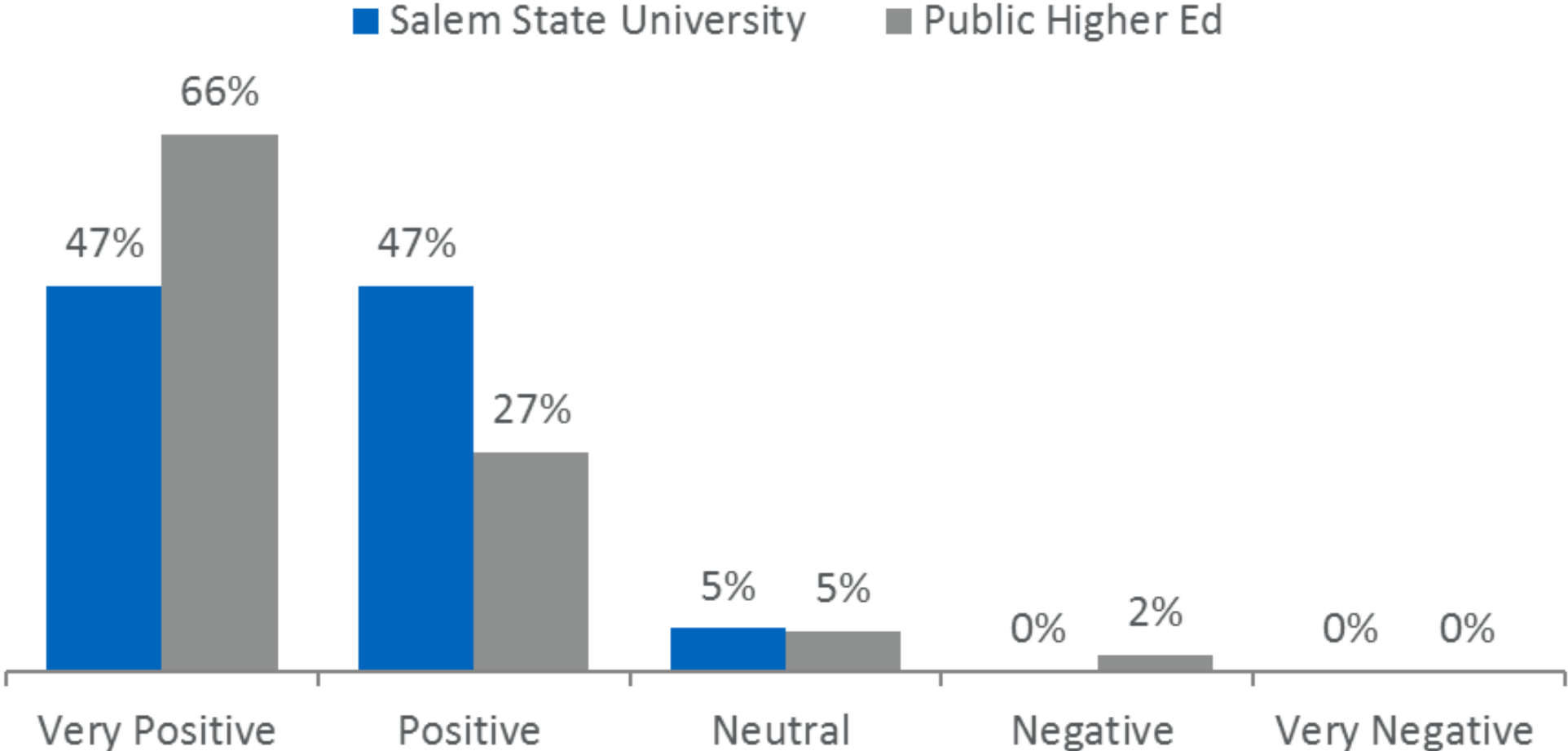
At optimal productivity levels, Salem State will need at least 5.5 FTEs dedicated to major and principal gift fundraising.

Feasibility Interviews Key Findings

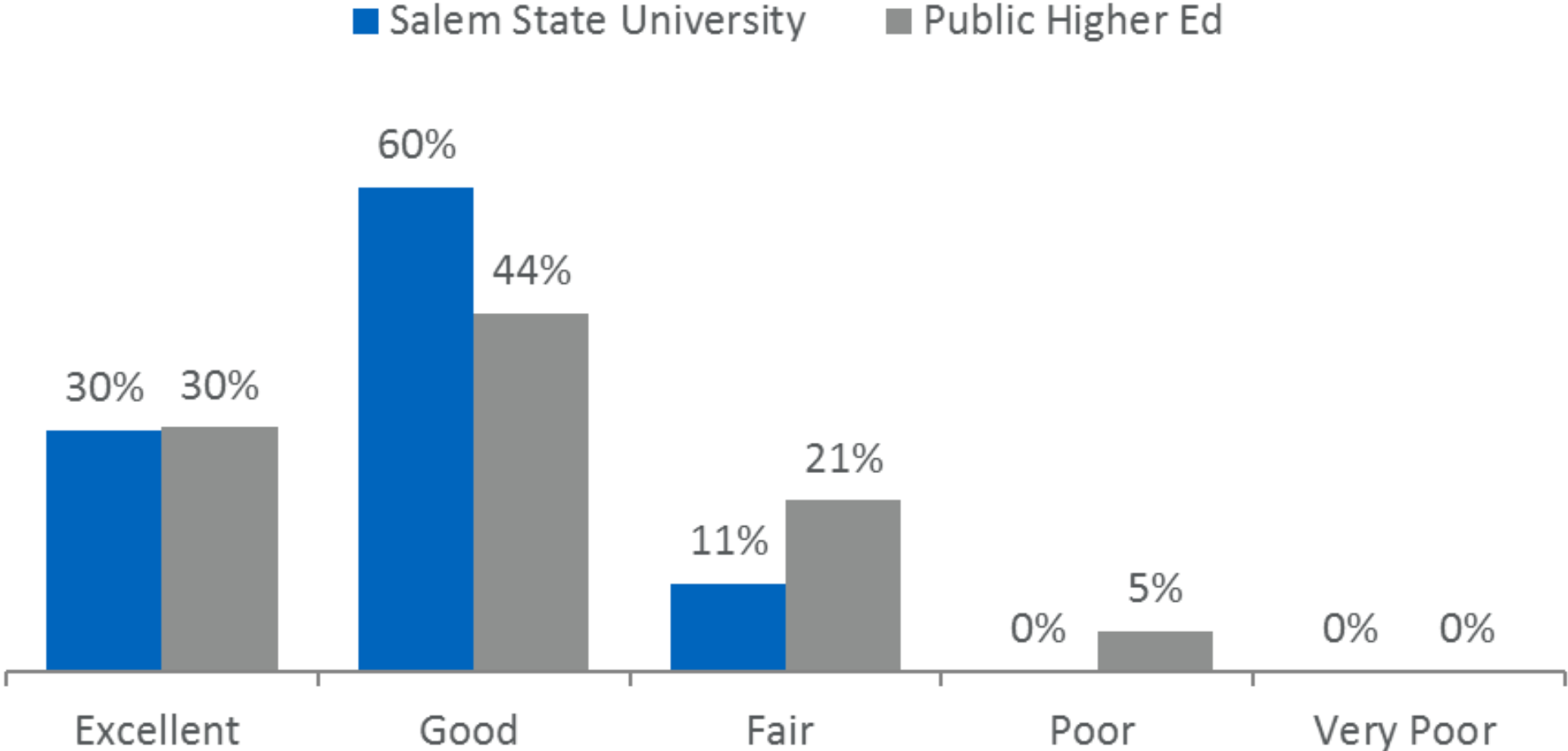
Attitudes and Perceptions

- Results show a consistent and “positive” attitude toward the University as a whole. Two respondents expressed a neutral attitude.
- Ninety percent (90%) perceive that SSU enjoys an “excellent” or “good” reputation among the North Shore; some expressed concern that SSU is not doing enough to communicate positive stories and that SSU’s reputation beyond the North Shore is unknown.
- There is a high sense of connection and engagement with the University from this cohort, with the exception of some disconnected community leaders.
- Despite some concerns about clarity of direction, 79% of respondents rated the leadership as “very positive” or “positive.”

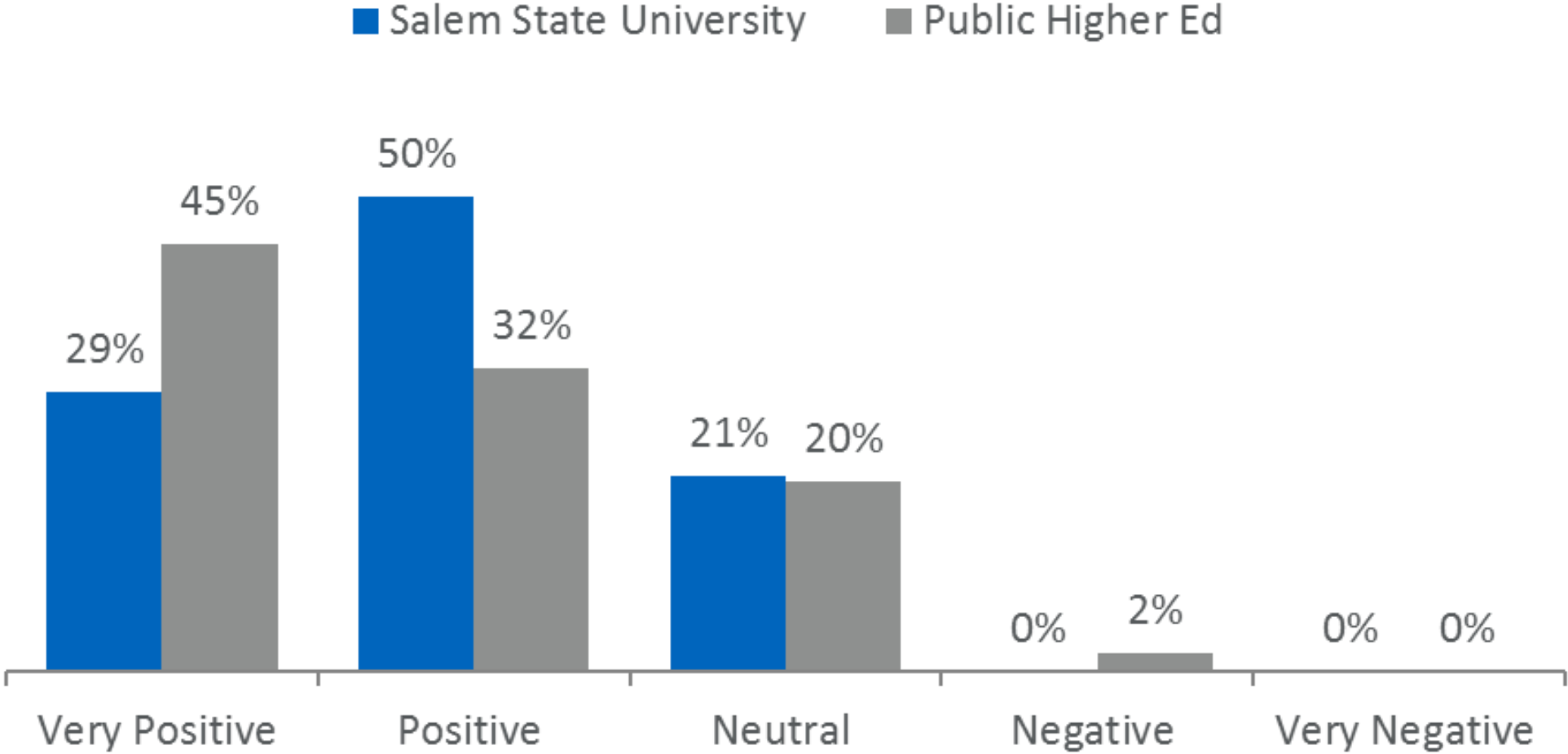
Current Attitude Toward Salem State



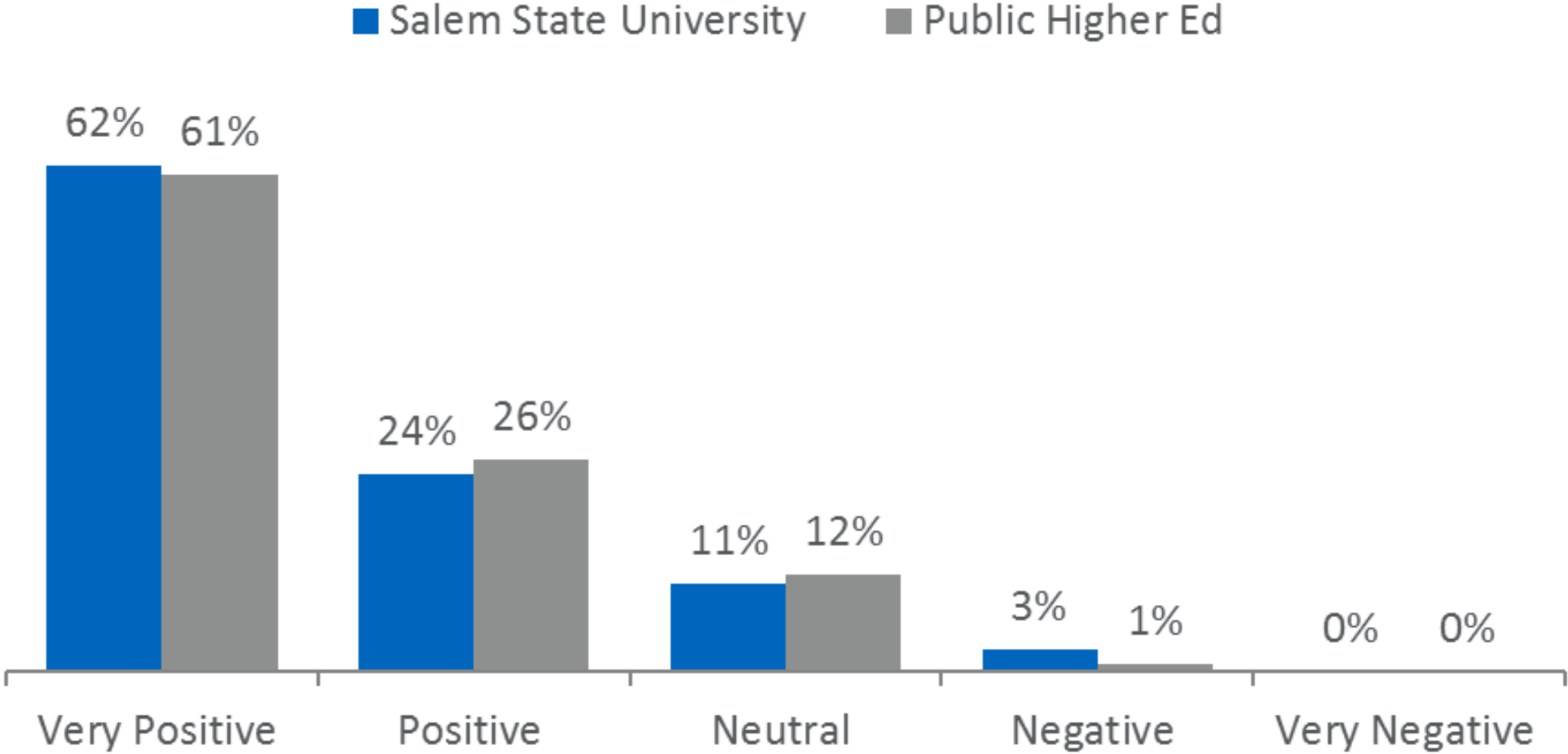
Reputation Within North Shore



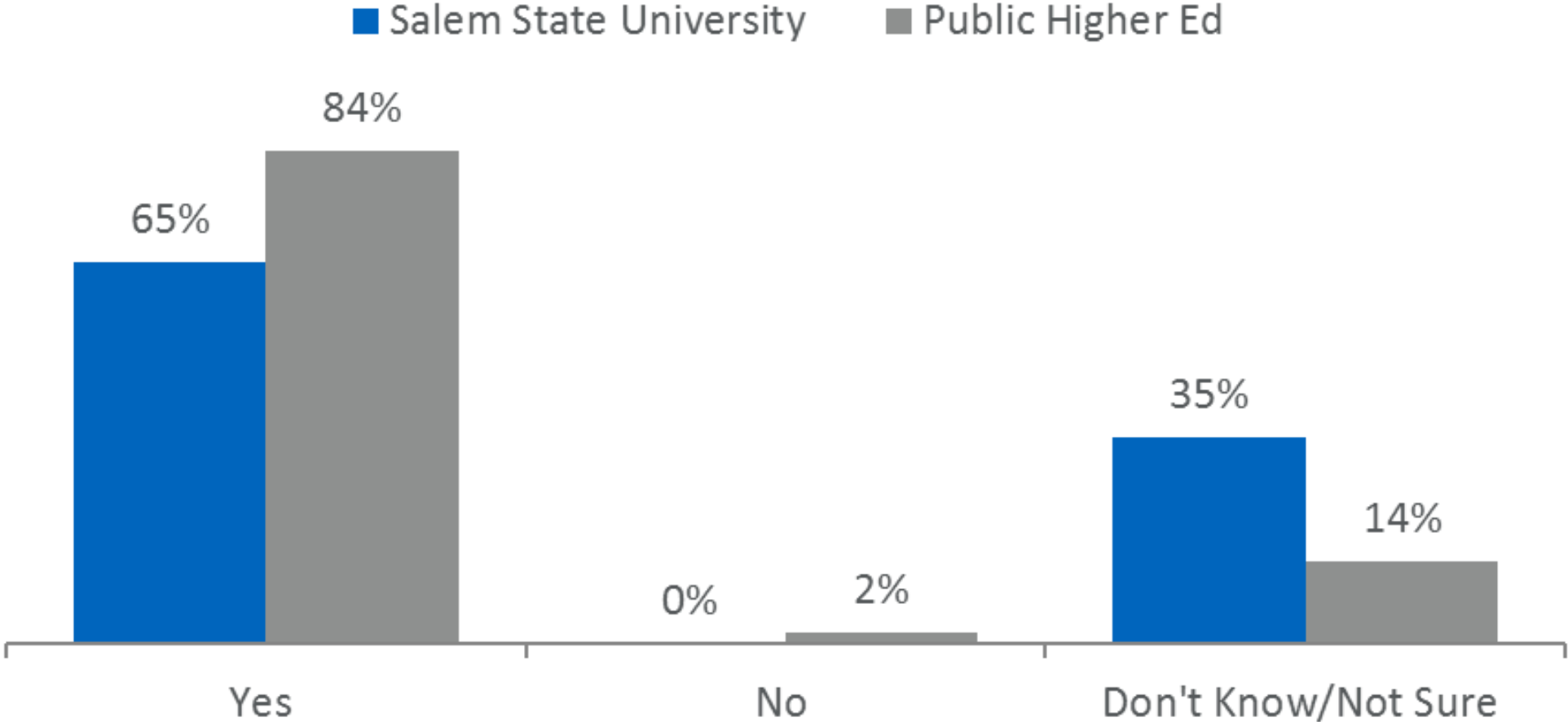
Perception of Leadership



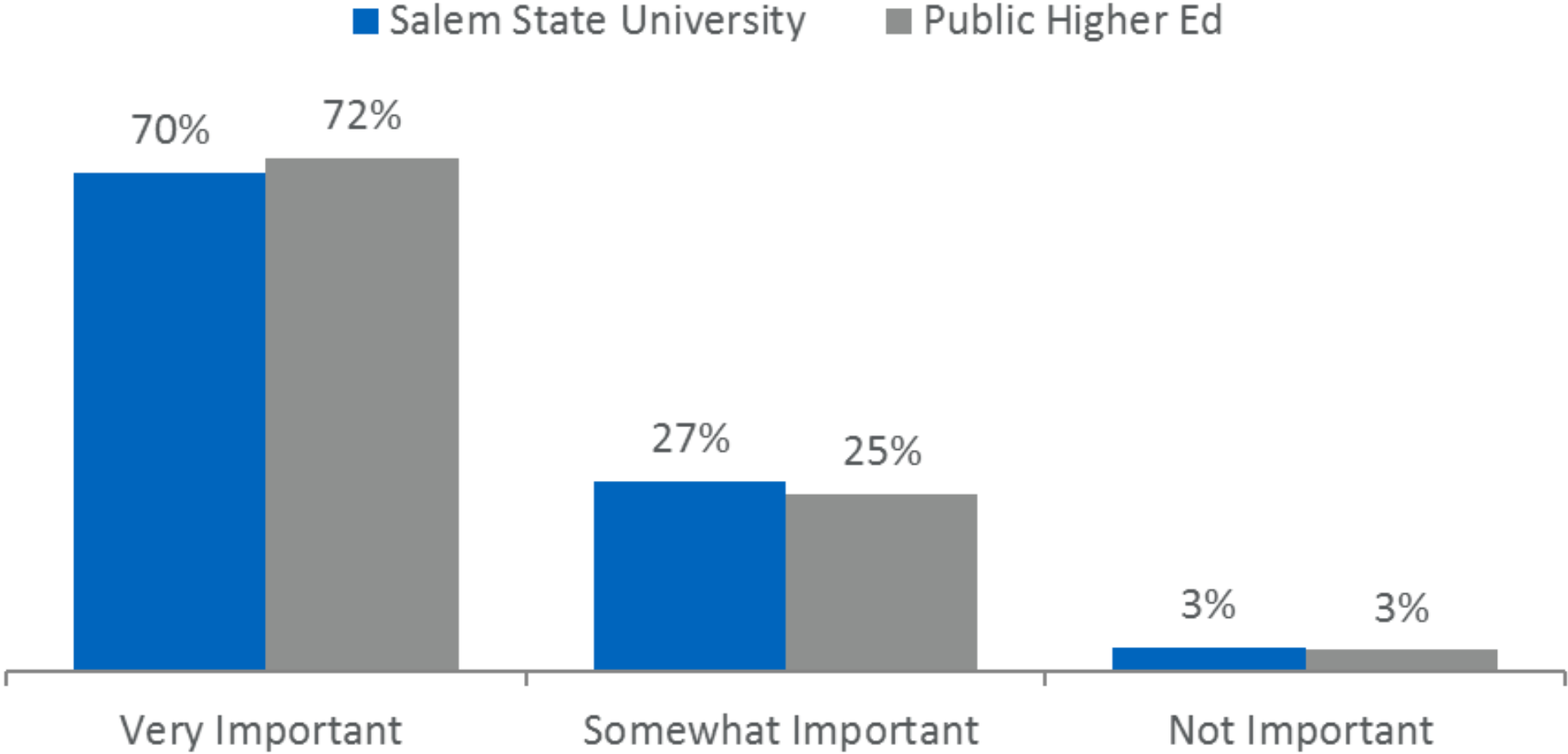
Perception of President Keenan



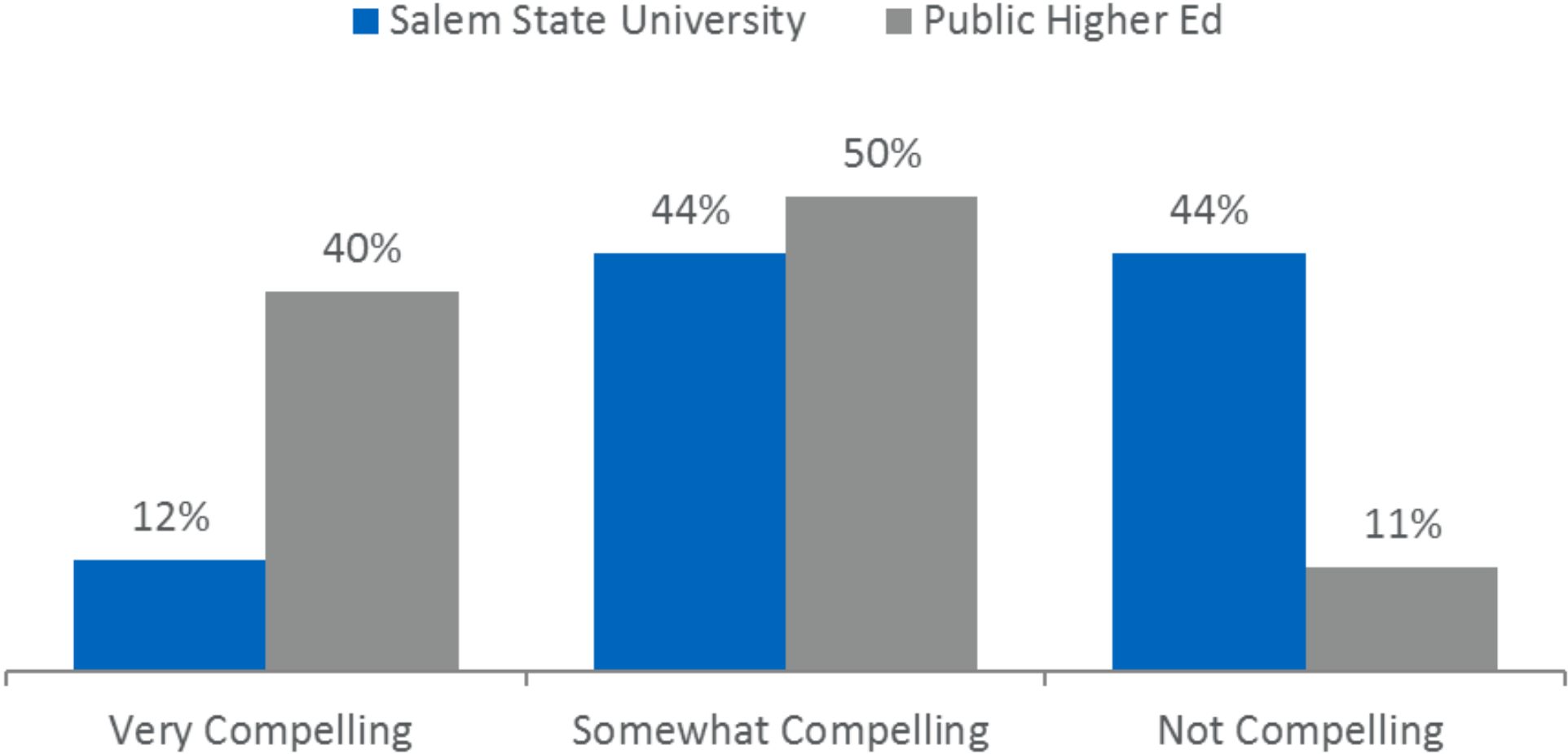
Approve of Salem State's Direction



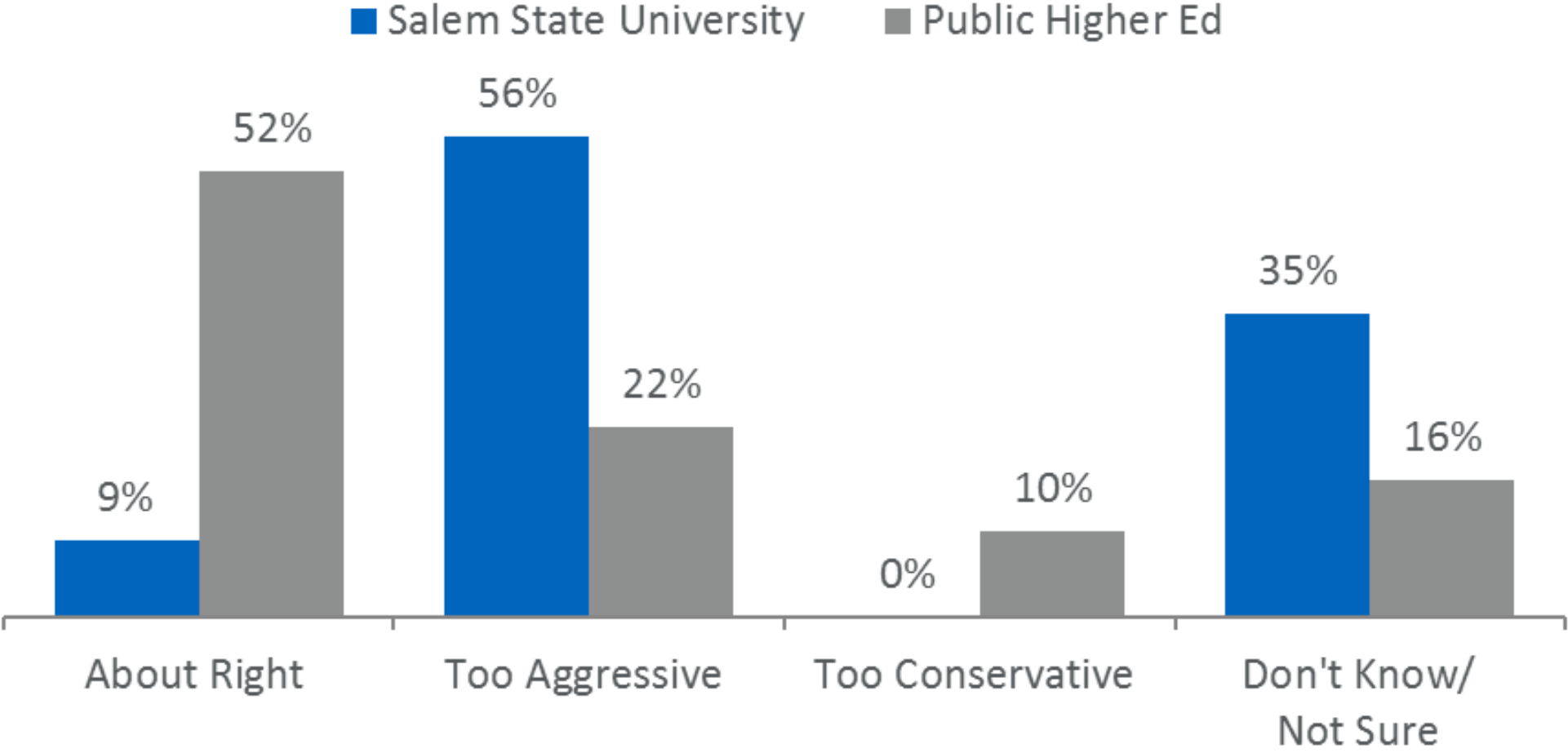
Importance of Campaign



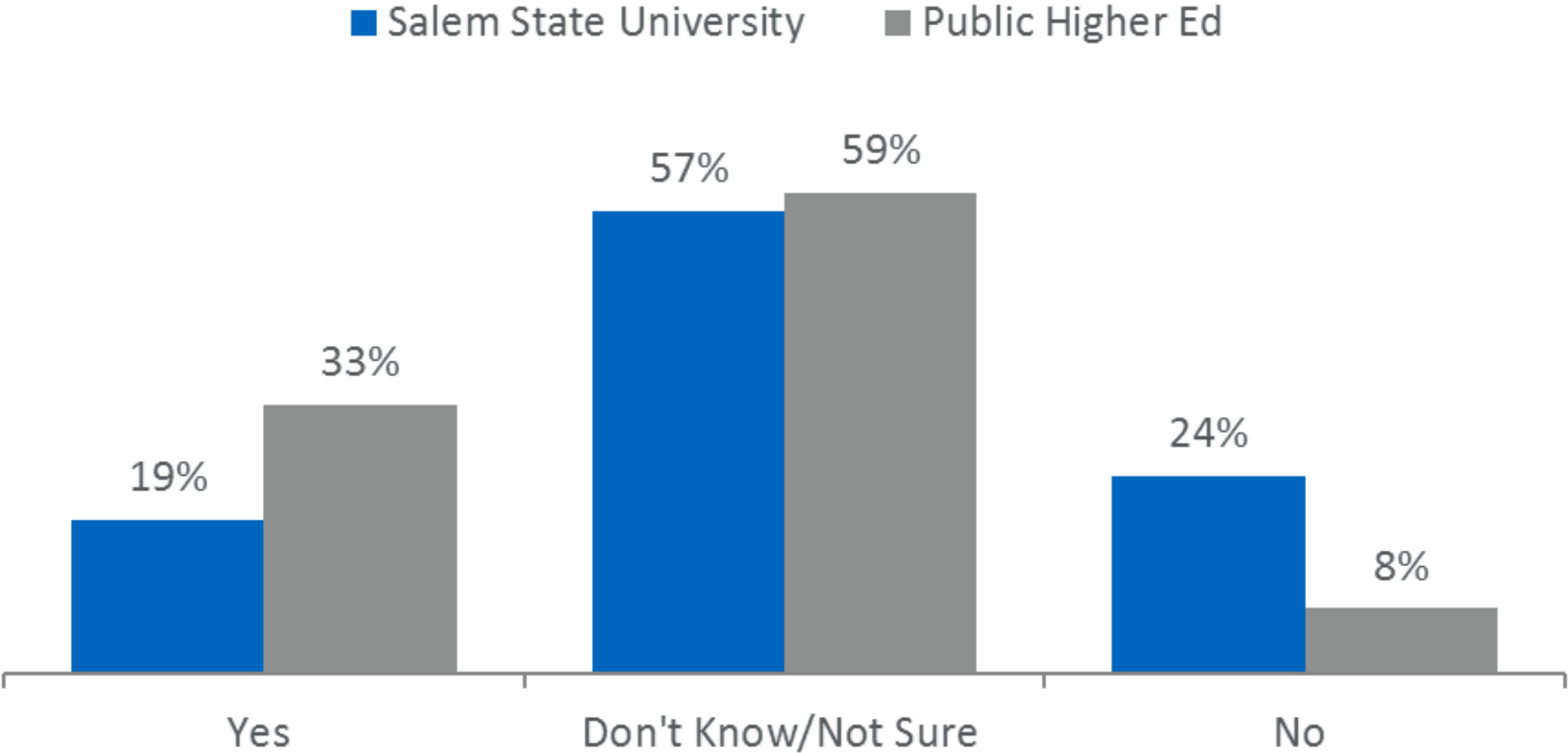
Assessment of Prospectus



Assessment \$100M Preliminary Goal



Capability of Securing Leadership Commitments

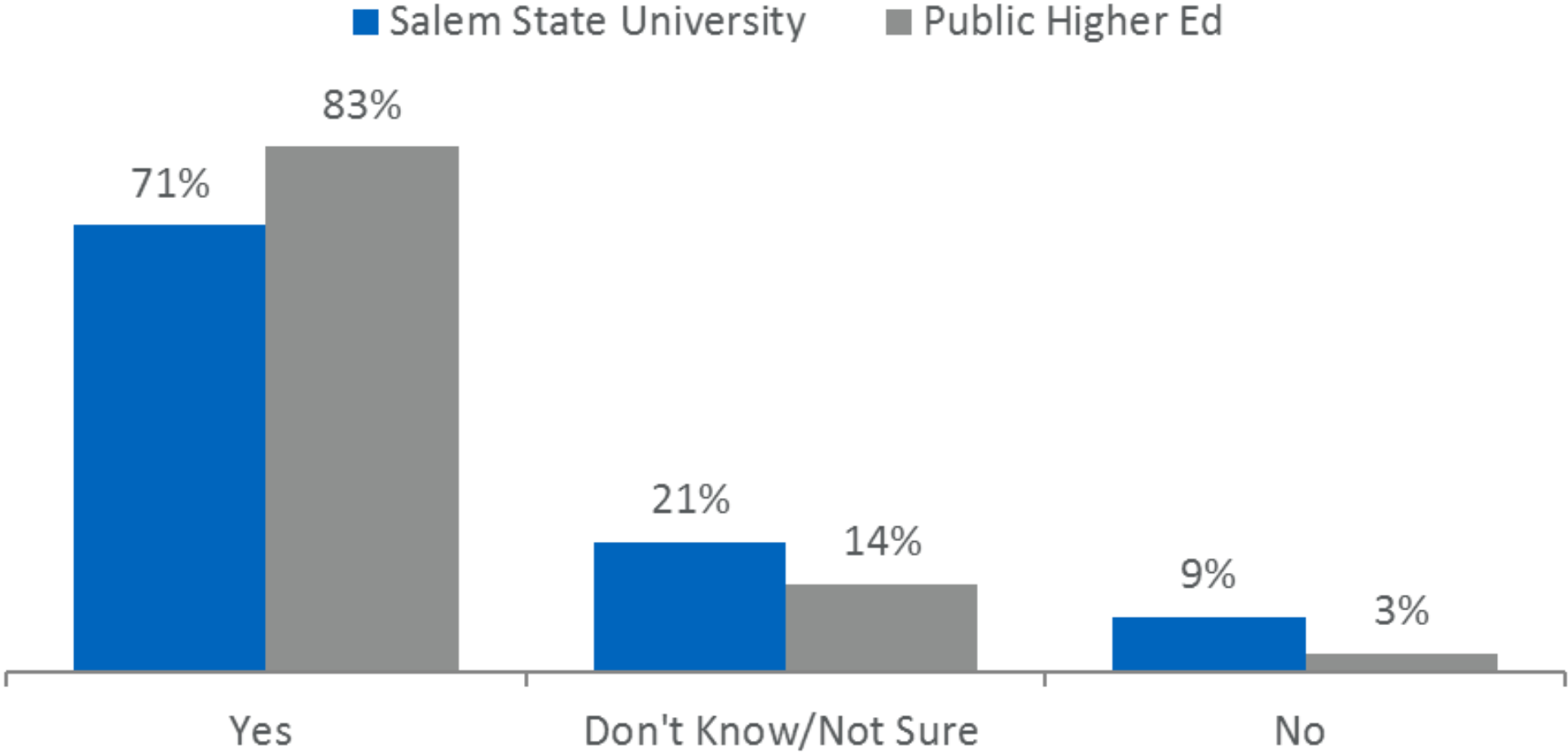


Greatest Challenges

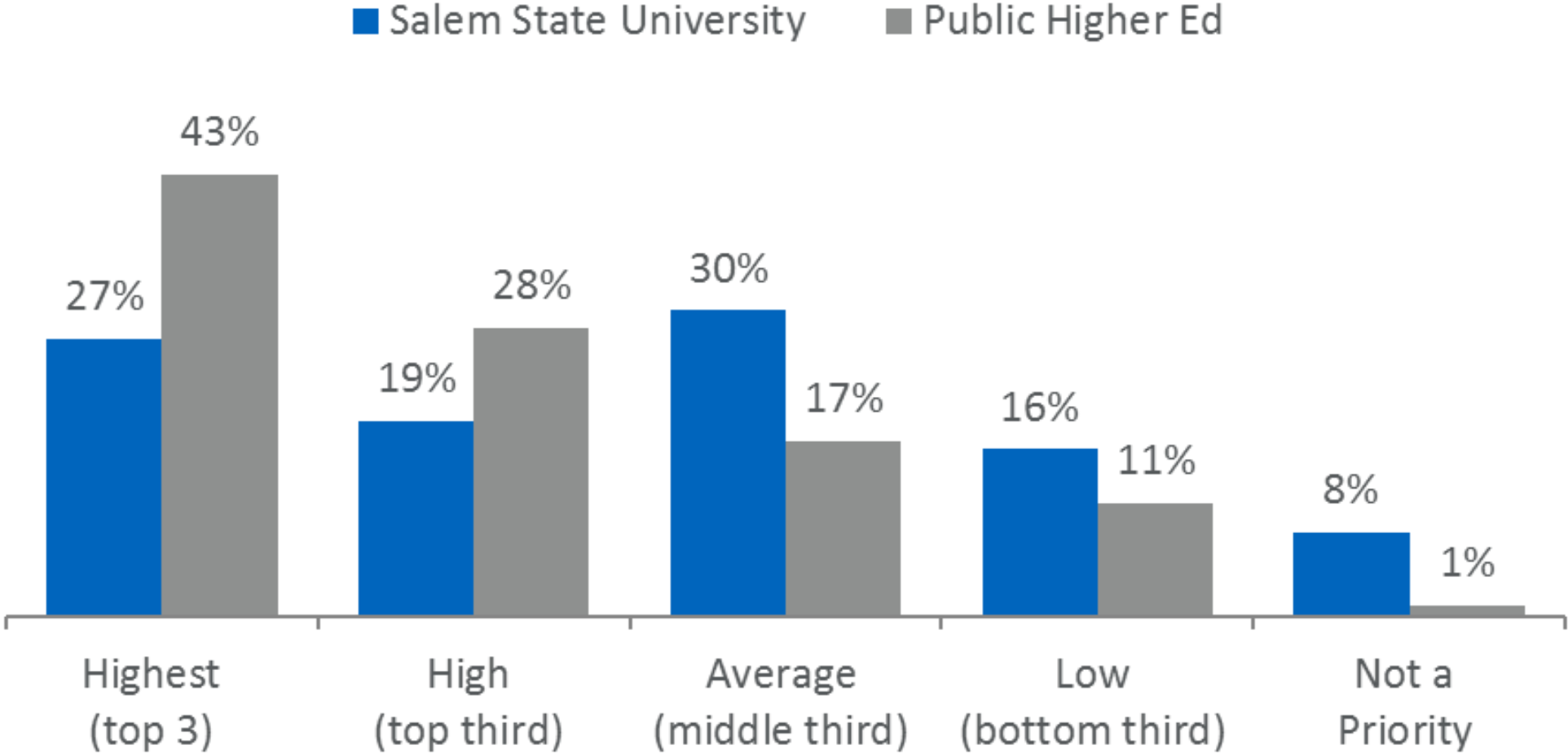
The most frequently cited challenges were:

- generating and communicating transformational ideas and vision;
- raising gifts of \$1 million or more;
- raising sights overall; and
- overcoming perceptions around public education funding.

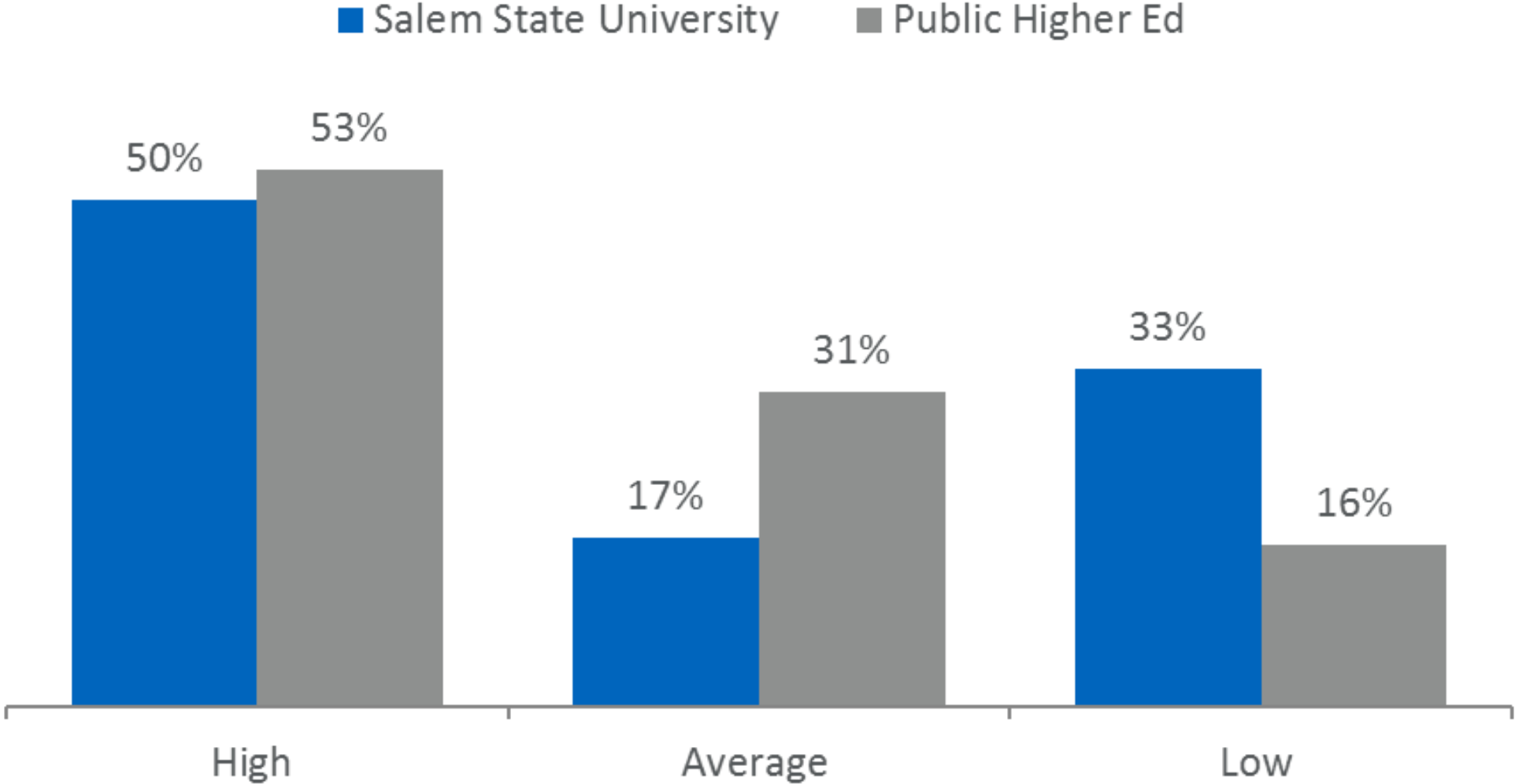
Approve of Moving Forward



Philanthropic Rank of Salem State



M&L Assessment of Interest



Personal Involvement

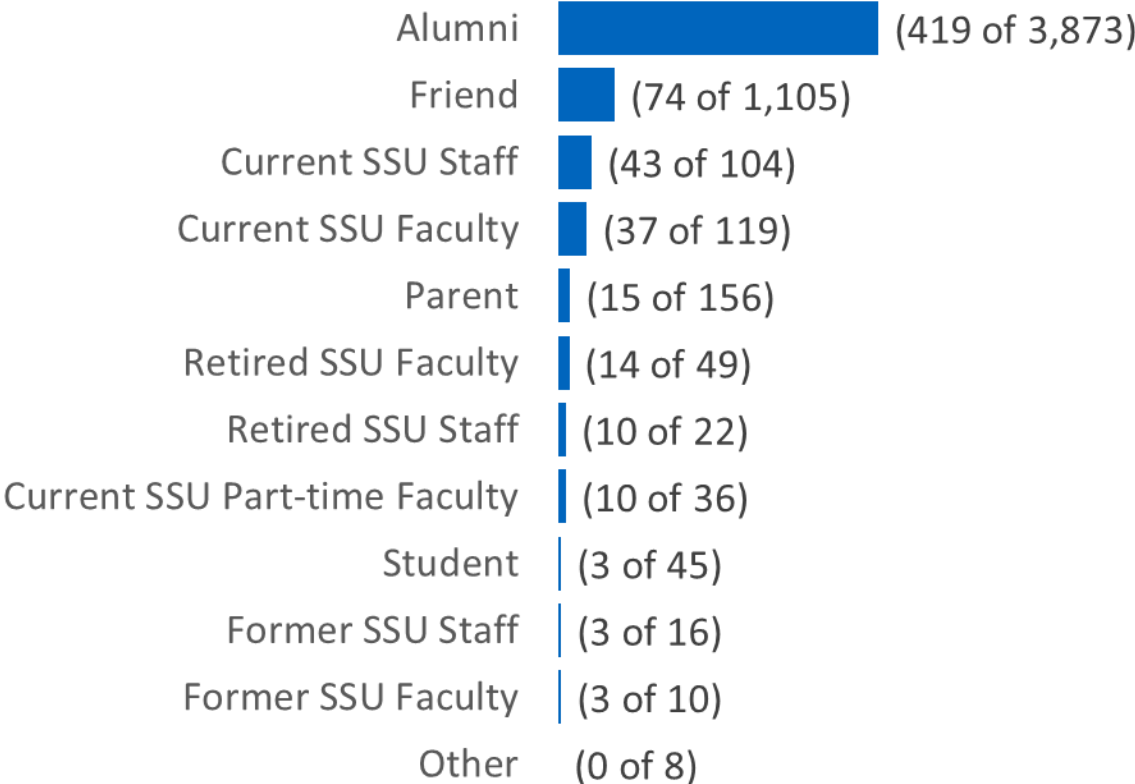
- 81% indicated they would expect to give.
- 44% indicated willingness to volunteer.
- Four indicated seven-figure or above.
- 23% have Salem State in estate plans and 23% would consider.

Online Survey

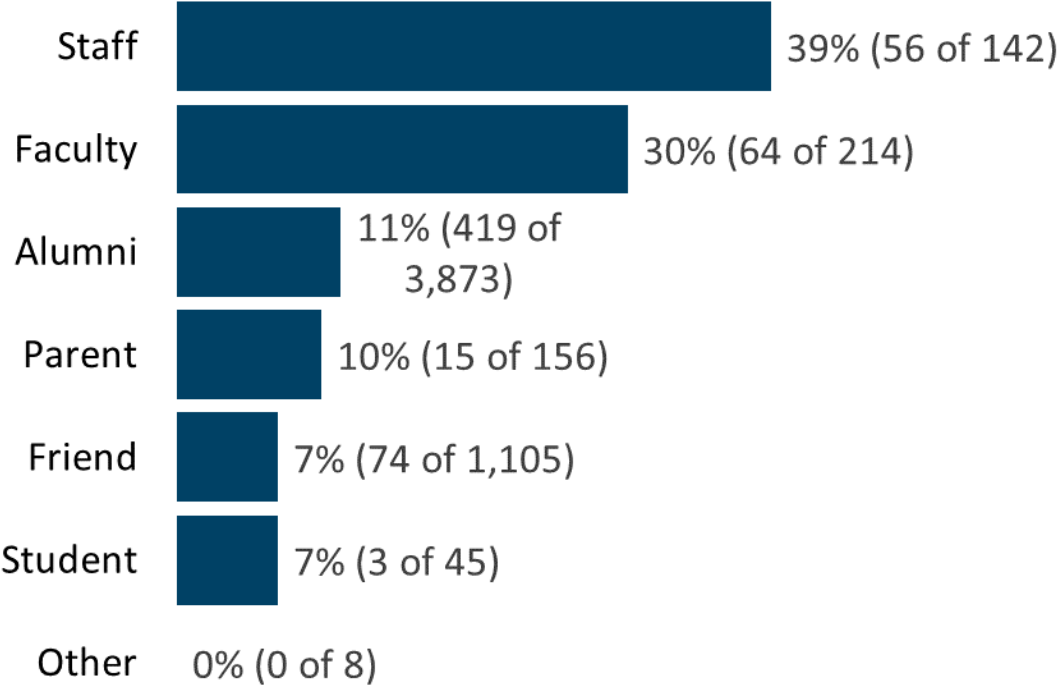
Survey Responses

SSU received 631 responses – a rate of 11%, exceeding expectations.

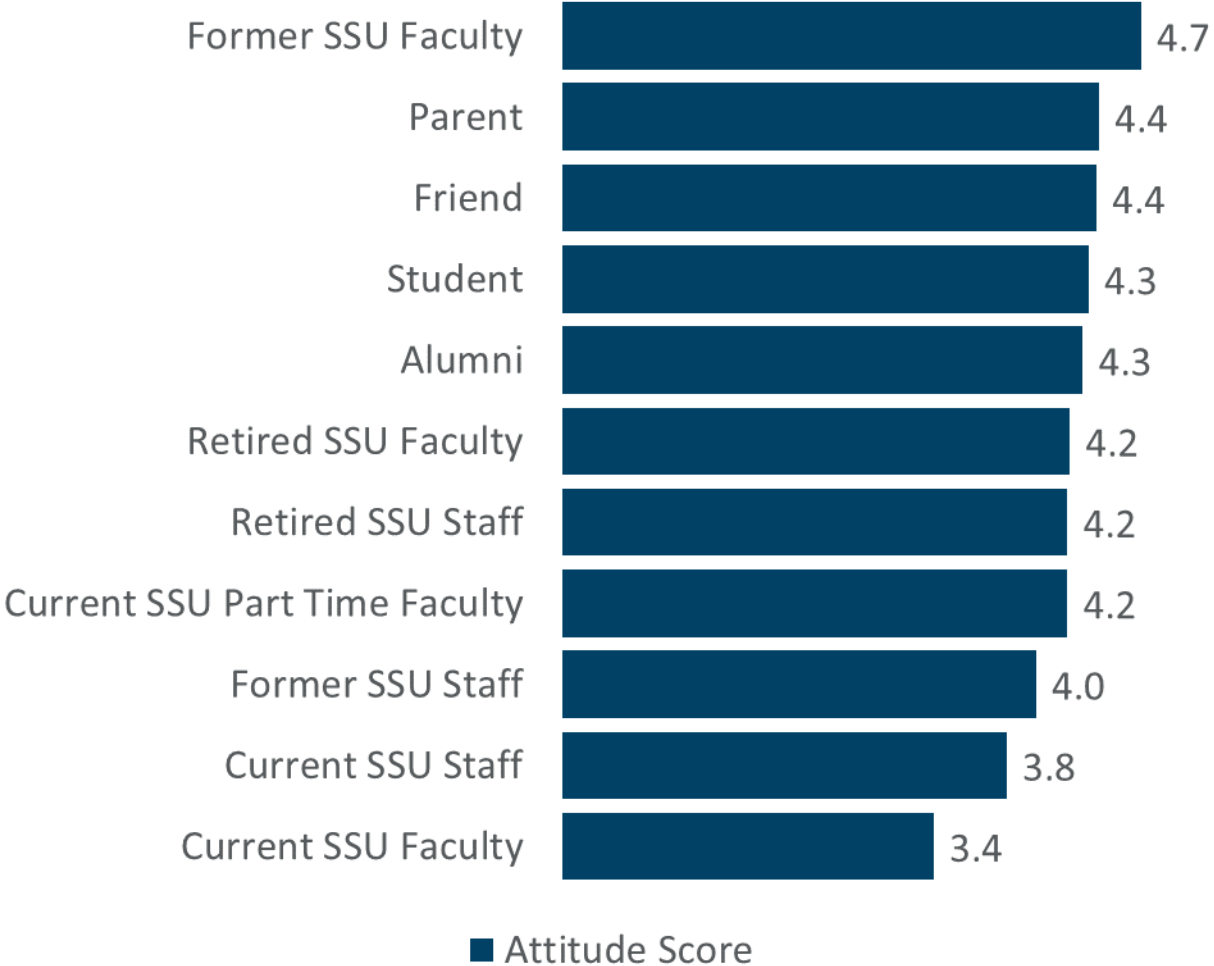
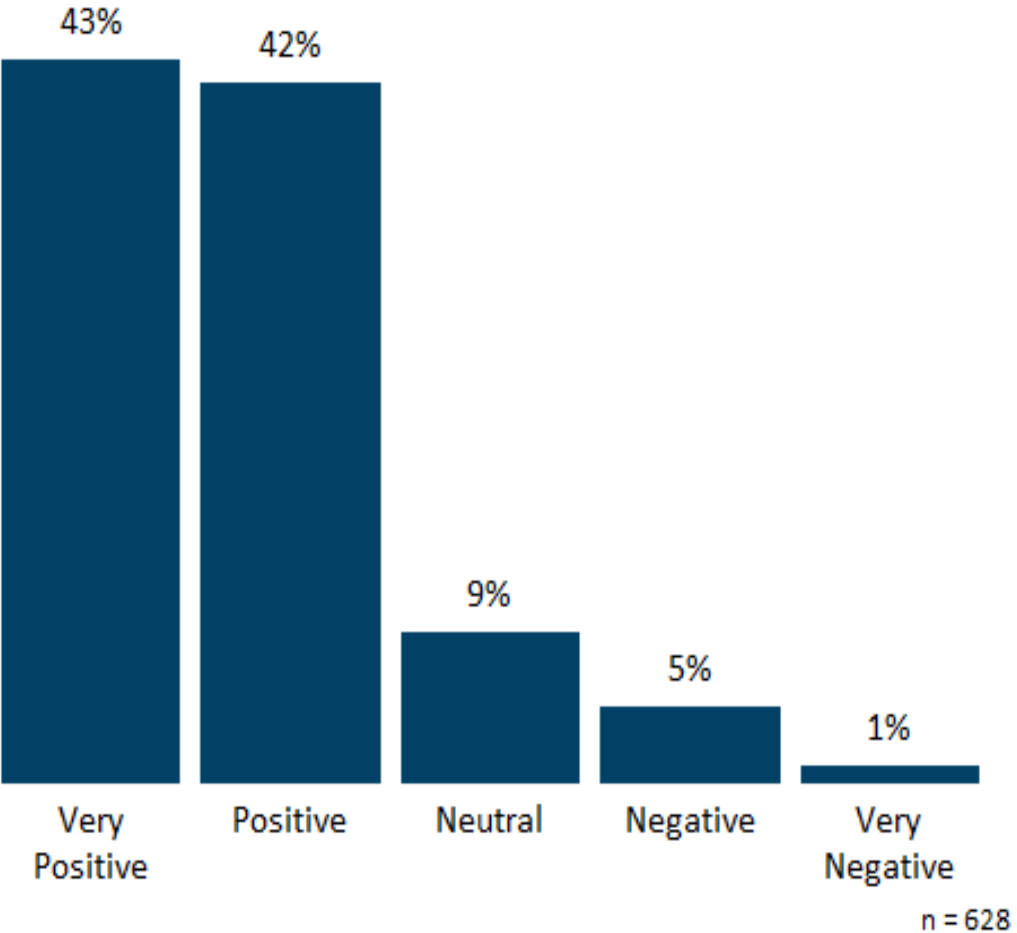
Respondents



Response Rate



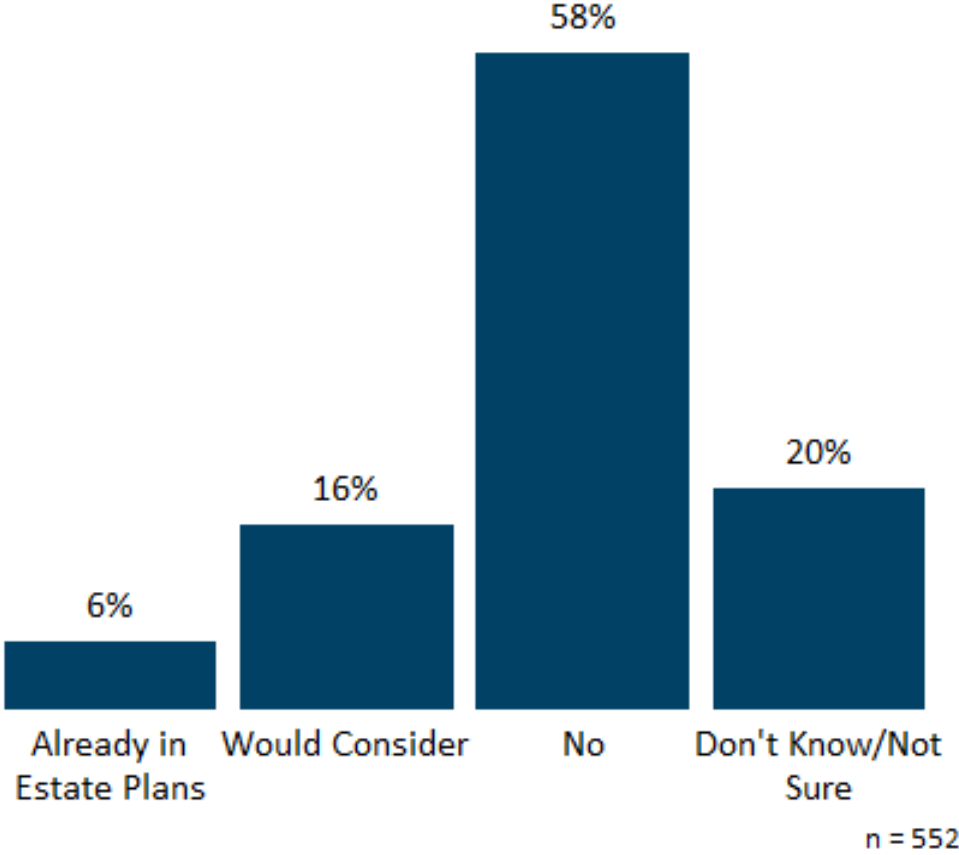
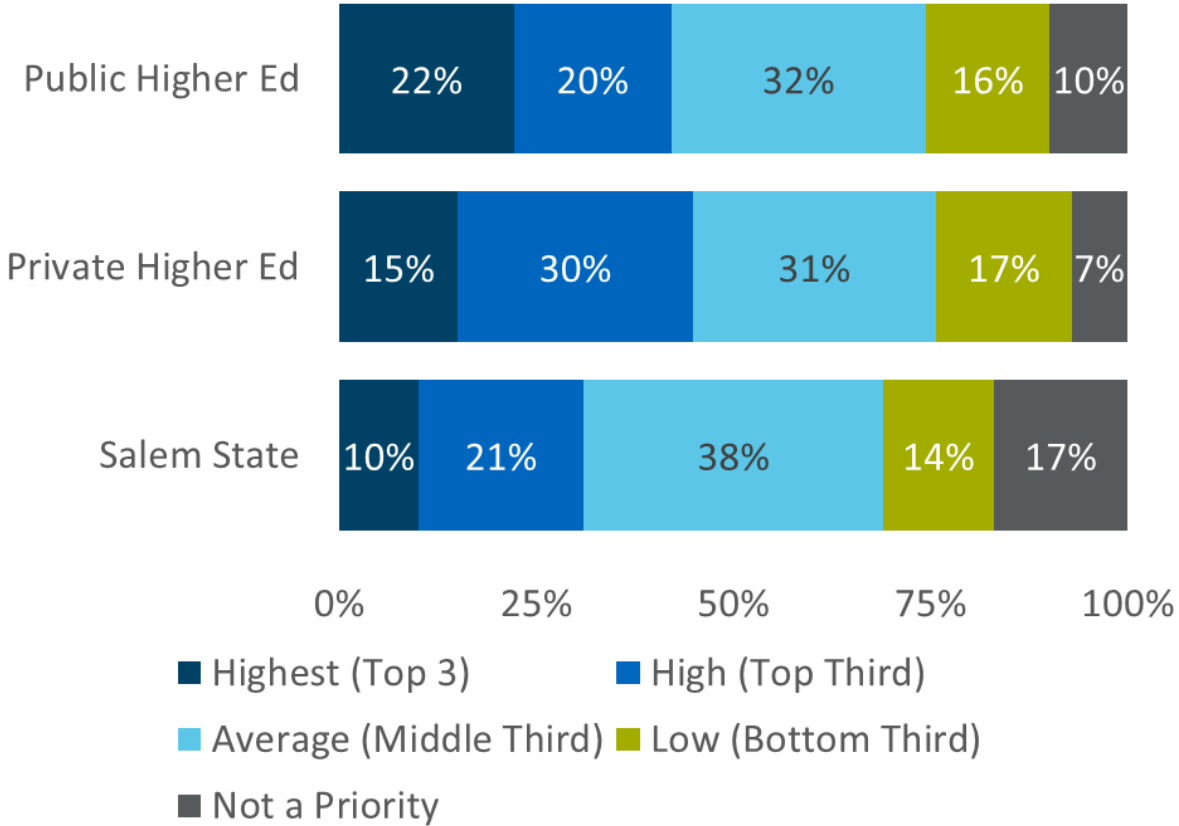
Current Attitude Toward Salem State



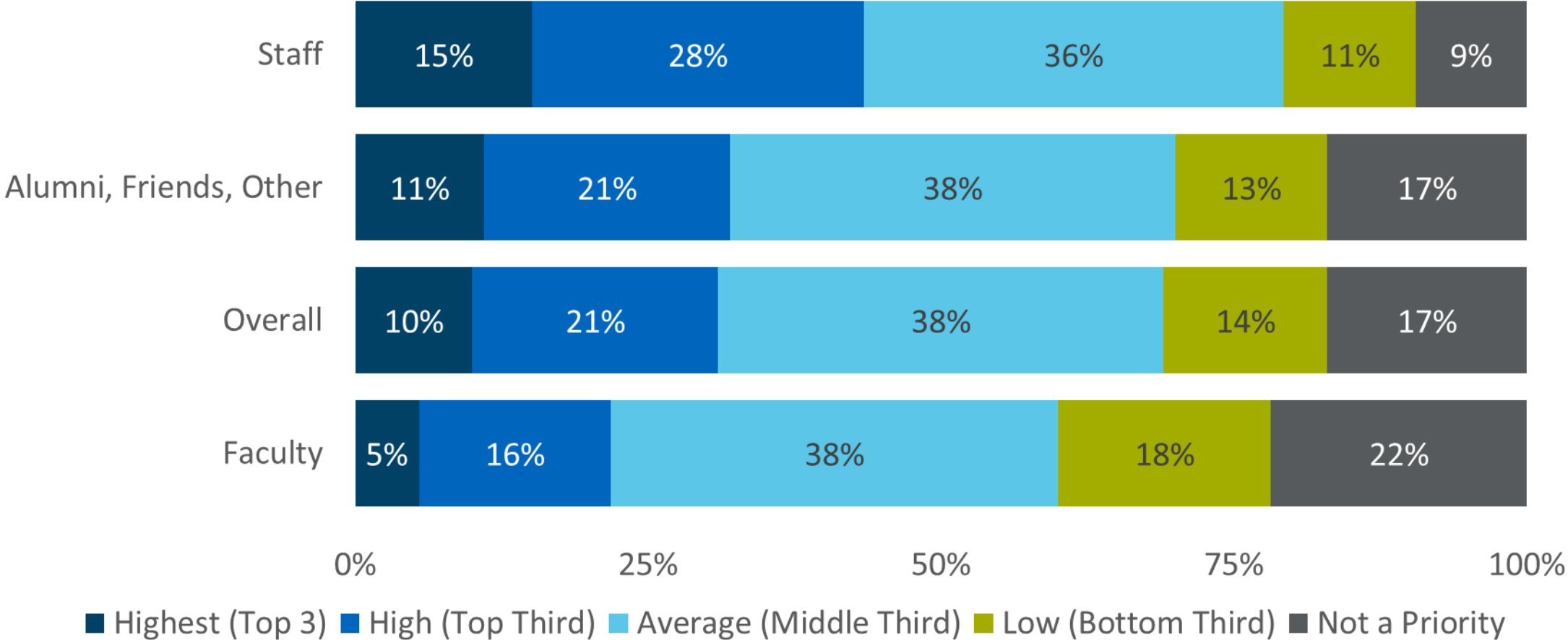
Current Attitudes

- The reputation of Salem State within the North Shore is very strong.
- A majority of respondents have positive perceptions of President John Keenan, overall University leadership, and the Salem State Foundation.
- Alumni feel less involved than respondents overall. Only 12 percent report being “very involved” compared to 19 percent for the entire respondent population.

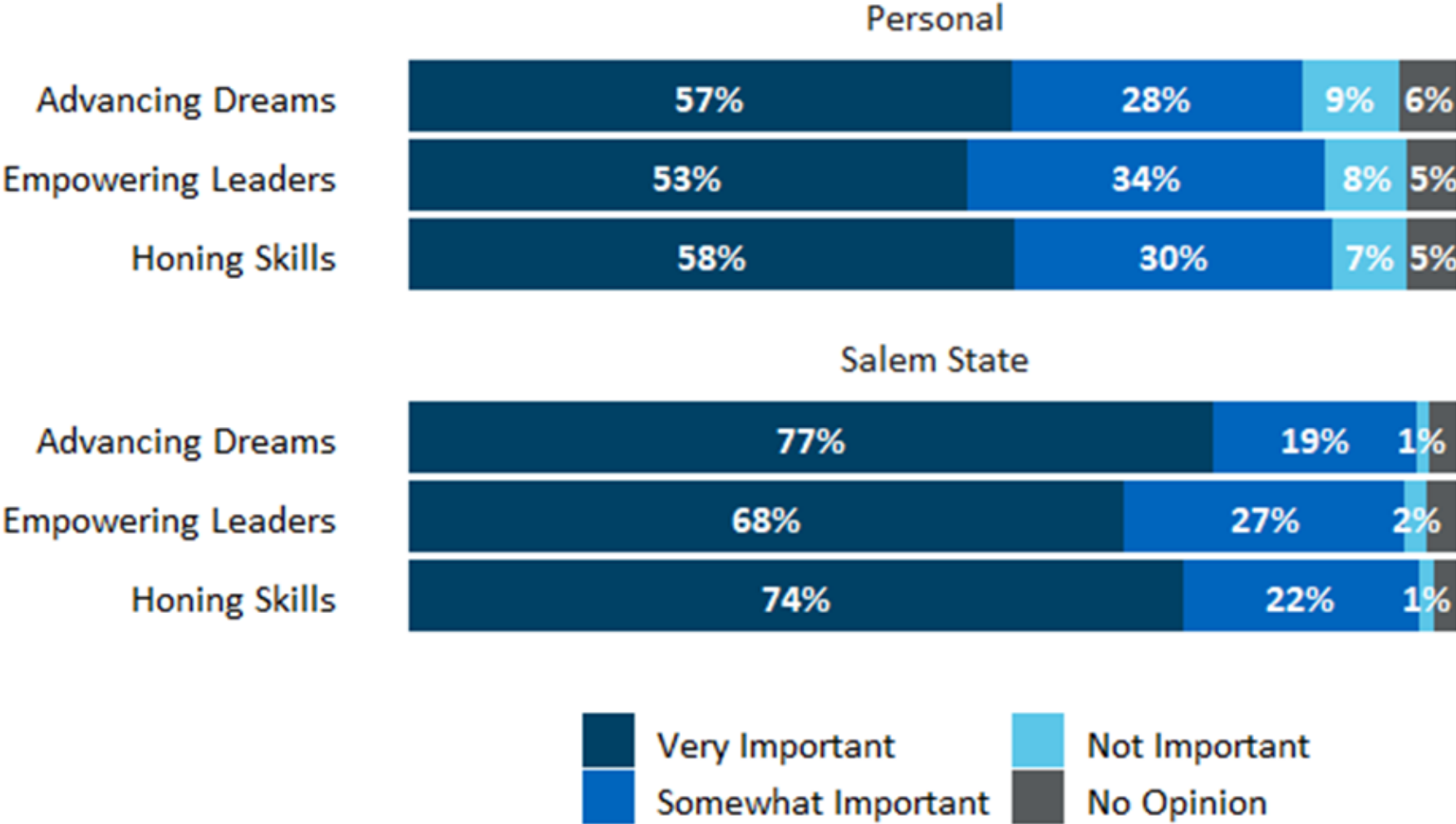
Salem State as a Philanthropic Priority



Philanthropic Priority by Constituency



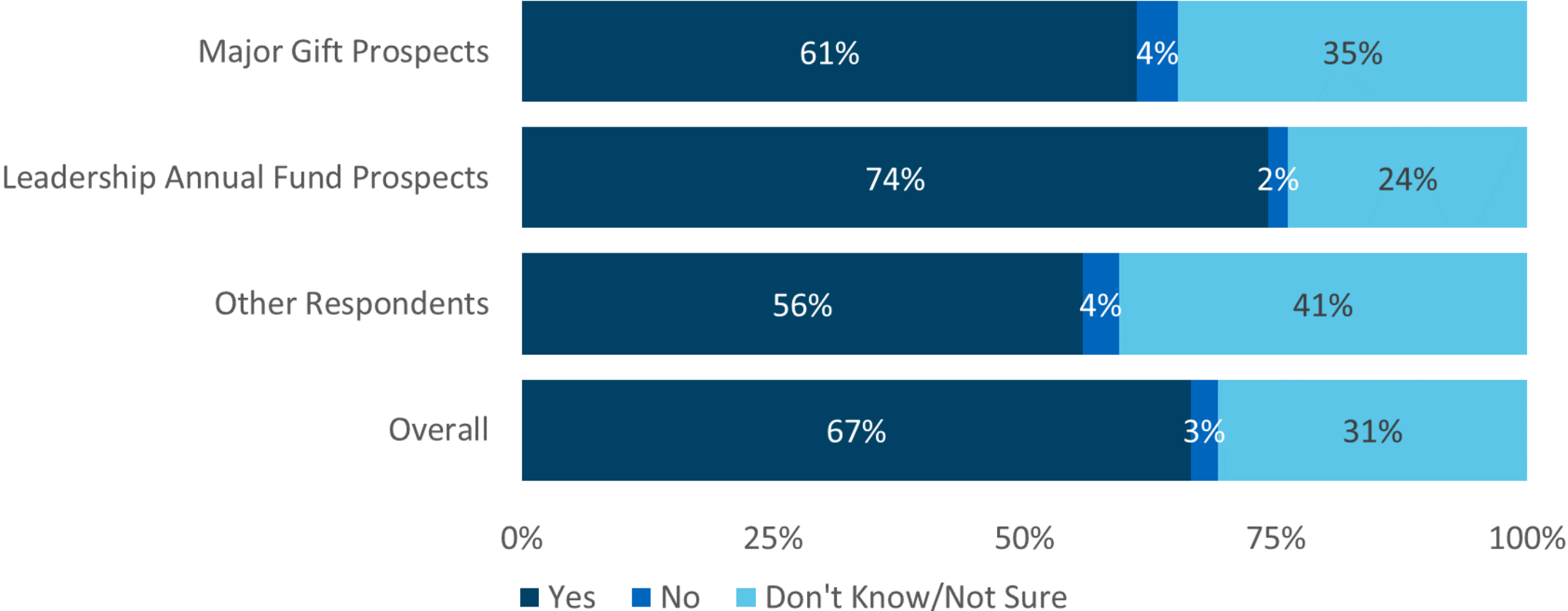
Thematic Priorities



Motivations for Giving



Campaign Approval



Next Steps

University Communications

- Now is the time to clearly and powerfully articulate an authentic brand identity for Salem State.
- This fall is the time for leadership to come out with a powerful, forward-looking message to the Salem State community and its various constituents.
- This will require a shift to a focused, unified approach to University marketing and communications.
- Enrollment and advancement must be prioritized for the Marketing and Communications team.

Overall Recommendations

- Enter a more intense planning and quiet phase with a keen focus on identifying top campaign priorities and highest level donor prospects to support those priorities.
- During this period of time (up to two years), SSU would build the campaign nucleus fund with a clear goal for the public launch of a comprehensive campaign.
- The campaign should be considered to be underway.

Overall Recommendations

- Create key success indicators to be met in order to launch a campaign.
 - Raise at least 60% of the desired campaign goal before the official public announcement, e.g., \$30M towards a \$50M goal.
 - Close at least two lead gifts of \$25M and \$10M toward campaign priorities to support a campaign goal of \$75M or \$100M.

Case for Support

- Re-draft a short “first-phase” case for support that:
 - highlights the smaller number of chosen priorities for the next two years;
 - attaches financial targets to each;
 - provides clear justification of their importance in the context of SSU; and
 - articulates more positively the impact of delivery of each project/area.
- Draft more detailed core proposal content on each project/area, fully signed off by leadership and relevant faculty members, providing common content to all individual approaches and proposal documents.
- Ensure broad internal buy-in for each of the chosen projects/areas.
- Identify the “flagship” project and move forward in planning the communications around this project.

Overall Recommendations

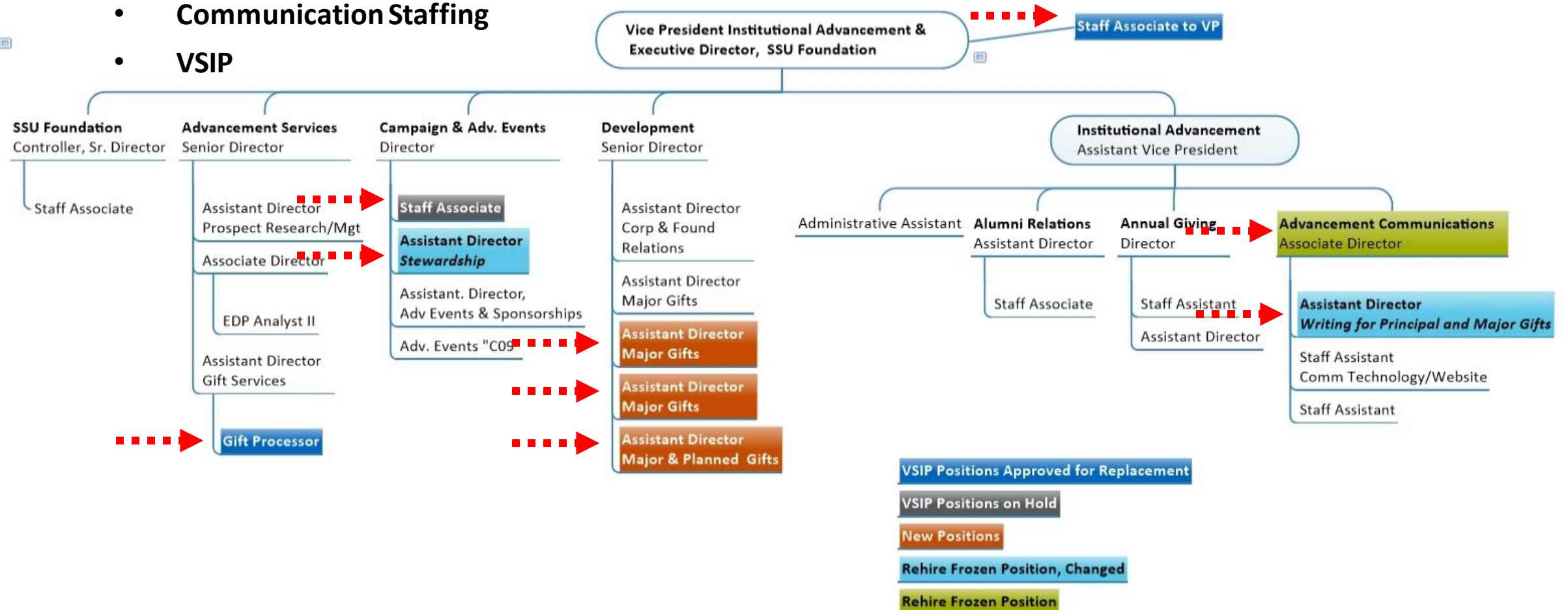
- **Begin recruitment of campaign leadership.**
 - Determine volunteer structure and leaders.
 - Determine key academics and staff to engage in campaign activities.
 - Create a training and engagement plan to enhance the fundraising capacity of the president, senior leaders (including deans), the Board of Trustees and the Foundation directors, and other volunteers.

Overall Recommendations

- Create strategic engagement plans for key constituencies and programs.
 - Include donor prospects at the highest level in discussions regarding the campaign priorities and donor roles in funding those priorities.
 - Bring together small groups of key prospects to hear about and comment on the case for support and its underlying priorities.
 - Create a comprehensive alumni engagement strategy and plan with appropriate staff and programmatic support and a focus on affinity programming versus regional programming.
 - Create a comprehensive stewardship plan with appropriate staff and programmatic support.

Advancement Staffing

- Major, Principal, Planned Gift Staffing
- Communication Staffing
- VSIP



Questions



THANK YOU!

Marts&Lundy