
SUBJECT: Advancement Committee Meeting Report for **September 20, 2023**

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 committee were Trustees Ruthanne Russell (board chair), Yalile Maldonado (vice chair), Samanta Morales, Brian Wellman, President Keenan (ex-officio), Vice President Cheryl Webster Crouse, Assistant Vice President Taylor Dunn, Assistant Vice President Mandy Ray, and Executive Assistant to Webster Crouse Hai Huynh. Absent from the committee was Trustee Jim Lampassi (chair).

Chair Russell called the meeting to order on behalf of Trustee Lampassi at 4:13 p.m.

Advancement

Meet the Moment's Impact on the strategic plan presentation (attached)

Vice President Webster Crouse submitted a written report on Advancement including a report on fundraising as of August 30, 2023 for the committee's review prior to the meeting. VP Webster Crouse thanked Chair Russell and the Board of Trustees. She noted that the Advancement team has reflected on the last three years and highlighted the impact of the campaign is helping to fuel the university's strategic plan. She introduced AVP Ray and AVP Dunn.

AVP Ray and AVP Dunn presented the Meet the Moment: Impact on the strategic plan slide deck. As of September 7, 2023, \$40,452,221 has been raised with \$16 million for financial aid, \$13.5 million towards unrestricted, \$8.6 million for retention, and \$2.3 million for SSU Bold. The campaign's goal was raised from \$50 million to \$75 million and was launched publicly on May 6, 2023. They focused on 5 out of the 7 strategic goals including financial vitality and sustainability, academic excellence and active learning, civic engagement and public good, justice, diversity, equity, and inclusion, and campus community and culture.

Questions

There being no new business to come before the committee,

A motion was made by Morales, seconded by Maldonado, and unanimously voted to adjourn the meeting.

The meeting was adjourned at 4:32 p.m.

TO: Advancement Committee of the Board of Trustees
Jim Lampassi, chair
Yalile Maldonado, vice chair
Samantha Morales
Brian Wellman

FROM: Cheryl Webster Crouse, vice president for advancement

SUBJECT: Committee Agenda for September 20, 2023

DATE: September 8, 2023

The Advancement Committee of the Board of Trustees and will meet on Wednesday, September 20, 2023 at 4 pm, via Zoom pursuant to An Act Relative to Extending Certain State of Emergency Accommodations, which, among other things, extends the expiration of the provisions pertaining to the Open Meeting Law to March 31, 2025.

Advancement Committee 4:00 – 4:30 pm (30 minutes)
AGENDA

- I. Meet the Moment's Impact on the strategic plan presentation (20 mins)
- II. Q & A (10 minutes)

Attachments for Advance Review:

- I. Advancement Briefing (pages 2 - 5)
- II. August 2023 Fundraising Dashboard (page 6)
- III. Meet the Moment Presentation September 2023 (pages 7 – 21)

cc: Board of Trustees
President's Cabinet
Steward, Unit I/AFSCME
Steward, Unit II/AFSCME
Salem Chapter President/APA
Salem Chapter President/MSCA
Lynne Montague, secretary, Board of Trustees



The primary focus of our September 20, 2023 Advancement committee meeting is to update the Board of Trustees on the Meet the Moment campaign and to share more about how the campaign maps to the newly adopted Strategic Plan: Meeting the Moment.

Please find a report on the work that Advancement did from July 1-2022 through June 30, 2023. For this report, we have mapped the work of Advancement to the newly adopted Strategic Plan: Meeting the Moment so you can see the impact the campaign has already made on the current university strategic plan.

Advancement FY23 Report:

Four years into the *Meet the Moment*TM (MTM) campaign, we have raised \$40,356,882-54% of our \$75 million goal. In February, the Board of Trustees and Foundation Board of Directors voted to increase the original campaign goal of \$50 million as a result of early success in the silent phase and a thorough reevaluation of campaign benchmarks. We rounded out the year with the official public announcement and event launch of the MTM campaign. This year we raised \$17,015,023 toward our fiscal 2023 goal of \$18 million. We secured the largest cash gift donated to any Massachusetts State University - \$10 million from the Cummings Foundation to establish the McKeown School of Education, in support of programs and initiatives aimed at diversifying, strengthening, and sustaining the next generation of educators. We retained 44% of our donors from last year with 76% of our three-plus year consecutive donors retained and acquired 905 new donors. The State Endowment Incentive match program was renewed by the Board of Higher Education and Salem State leveraged the \$555,555 matching funds to subsidize five funds that had not yet met the endowment level since being established allowing for the scholarships to now live on in perpetuity and the new creation of three endowed scholarships, the Charlotte Forten Scholarship, the Indigenous Peoples Scholarship, and the Salem State Internship Scholarship.

Academic Excellence and Active learning:

Since July of 2019, 1,047 students from 33 majors received donor-supported internship scholarships. Of the 120-student participating in the Bertolon School of Business Internship program this year, 55 received stipends helping to close financial gaps. Philanthropy continues to drive the Emerging Scholar Program which provides undergraduates with peer learning to augment the classroom experience and bringing together those from similar backgrounds to assist in navigating educational and co-curricular experiences. A new cohort, La Vida Scholars, was created to assist first-generation students from Lynn with peer-mentoring and coaching support. Campaign

funding priorities were identified for each school and unit in collaboration with deans and faculty to create seven academic cases for support. In partnership with athletics, \$64,467 was raised for the Cioffi Student-Athlete Wellness fund to support the student-athlete experience in honor of student Sam Cioffi. Fundraising supported several faculty-led student trips to Paris, Greece, Italy, and the Myrtle Beach softball training camp. Tributes poured in for long-time Viking, Henry Dembowski '60, '62G including a fundraising match for the Dembowski Family Theatre fund resulting in raising \$72,878 in endowed funds for the theatre and speech communications department. The accelerated bachelor's in nursing program received \$20,000 in unrestricted support for crucial financial assistance for students who reached their maximum loan eligibility before starting the program reducing the reliance on high-interest private loans to graduate on time.

Civic Engagement and Public Good:

Since the start of the campaign, the Center for Civic Engagement has received \$122,000 of unrestricted funds, crucial funding ensuring the annual Day of Service program continues. This year advancement supported the programming and fundraising in honor of the 20th anniversary of the congressional internship program resulting in raising \$32,135 for the long-time and successful internship program.

Justice, Diversity, Equity and Inclusion:

This fiscal year, Hispanic Serving Institutions preparedness efforts received \$30,000 in unrestricted funds to provide resources for training, programming, employee resource groups and research. The Foundation's JEDI ad-hoc committee reviewed policies, bylaws and the strategic plan and implemented inclusive language. The Foundation Board of Directors participated in a full-day WillHouse Global JEDI workshop. In addition, the \$10 million gift to the McKeown School of Education from the Cummings Foundation has allowed the school to scale-up the Educators Scholars of Color program, increasing student recruitment. Since it was established 26 students have participated and this year, eight graduated.

Campus community and Culture:

The MTM Campaign continues to generate new financial resources to help foster belonging and innovation. All 30 academic departments are featured in campaign communications. This year we launched a new advancement ambassador program to activate volunteer advocates in helping promote the campaign and 225 employees attended campaign launch events. The campaign launch activities provided campus attendees with camaraderie and affirmation of their positive impact on our students. For instance, attendees shared; *"Without hesitation, I can honestly say that it was the best event that I have attended in my 35 years at SSU for the way it moved all in attendance to see how we support our students."*; *"Students who were at the event were in awe about how much we are doing to support them. When our students are in awe, that is the best thank you that we can receive.;"* *"What an amazing and inspiring event last night! Thank you for telling our story in such a compelling way!"*

The advancement team hosted monthly team meetings in person and an annual team retreat with an emotional intelligence workshop and several teambuilding activities. Established an employee increased compensation program to recognize and retain advancement team members during the campaign. We hosted 90 virtual and in-person events this year including the 40th Anniversary of the Salem State Series with Amal Clooney and the launch celebration for MTM. The Foundation sponsored nine events with 595 unique attendees, of whom 12 were new donors and 1 was newly identified as a major gift prospect. Successfully expanded the annual Scholars and Donor celebration to include additional donor segments and therefore built on this successful event. We returned to Naples, Florida for our annual programming and hosted campaign events in both Florida and California. We hosted the Athletic Hall of Fame, etiquette dinner, BSB spring social, the Educators Pinning Ceremony and Veterans Stole Ceremony. The Alumni Association sponsored cartoonist and *Woke* series creator Keith Knight '90 as this year's convocation speaker. We produced videos for VWD and MTM and incorporated video features into event programming and social media. Signage, billboards and banners displayed the MTM brand to the greater community. A newly designed campaign website launched to educate the community on the goals, funding priorities and to spotlight the impact of giving. It Takes a Viking podcast released 15 new episodes, further highlighting our high-achieving Vikings and campaign volunteers. Donor impact stories and press releases (19) were widely circulated on the website, social media and Polaris channel for the internal university community. Finally, we ended the year with Alumni Weekend which includes POMP (Party on McKeown Plaza), class reunion/giving efforts for classes ending in 3 and 8 raising \$223,696, a celebration for the new class of 40 under 40 alumni and recognition of alumni awardees at our annual Jazz Brunch

Operational Excellence and Infrastructure:

Since the start of the campaign, we have raised \$2.3 million for SSU BOLD. Advancement continues to build partnerships with supporters in the science, healthcare and biotech industries to secure gifts toward BOLD. Working with financial aid, the donor relations team removed process barriers to create a shared schedule and process for departments to request stipends for students from donor funds. In partnership with board volunteers, we coordinated the unification of the Salem State University Alumni Association and Salem State University Foundation, Inc. into one newly formed organization, the Salem State University Alumni Association and Foundation, Inc. (AA&F) which will reduce redundancies, further strengthening the boards commitment to student success.

Financial Vitality and Sustainability:

Since the start of the campaign, 1459 students have increasingly benefitted from donor-supported financial assistance, including Viking Completion Grants (172) and the student emergency fund (615) which provides much needed resources for our food and housing insecure students. 9 new scholarships were created in FY23. \$5,846,566 was transferred to the university this year (including the last installment of the Mellon Grant totaling over \$1.4 million) and \$958,986 was directed to financial aid. A successful Foundation annual audit without findings was achieved, improvement of the reporting

that evaluates our investment managers' performance is ongoing. The Foundation's endowment surpassed \$50 million for the first time in its history. We continue to steward donors through personalized stewardship practices; five donor impact reports were created for donors giving over \$100,000; 225 endowment reports were distributed to fund contacts and donors greater than \$5,000; grant impact reports were sent to 13 foundations; an annual fund impact report was produced for over 1,500 FY22 donors; an Impact publication was produced for over 9,000 donors that included the Foundations Annual Report and a campaign update for silent phase campaign donors; all sponsorships were maintained for programs including: Darwin Festival, Salem State Series, Cioffi Wellness Fund Jamboree, career services and the BSB pitch contest.

Gift activity:

An anonymous friend made a planned gift for a previously established scholarship in their mother's memory. They made regular gifts to the fund since its creation six years ago, and as of April 2023 had given approximately \$17,000. This spring, after enjoying their donor experience, they signed a planned gift commitment of \$200,000 for the scholarship which will permanently endow the fund and ensure a lasting awardable legacy for generations to come.

The family of Sam Cioffi, a Salem State lacrosse team member who passed away in 2021, sought to honor his memory by helping current and future Salem State students. Through crowdfunding and personal solicitation, they rallied to raise nearly \$65,000 to create the Sam Cioffi Student-Athletic Wellness Fund to enhance and elevate the student-athlete experience through providing support and resources for mental and physical wellness, academic and athletic excellence, personal and career development and life skills programming. The goal is to name a space in his memory where this work will happen.

We're working with a Foundation on a multi-year grant in support of Center for Holocaust and Genocide Studies.

SAVE THE DATE:

Annual Scholar and Donor Reception will be held on November 15 at 6:30 pm.

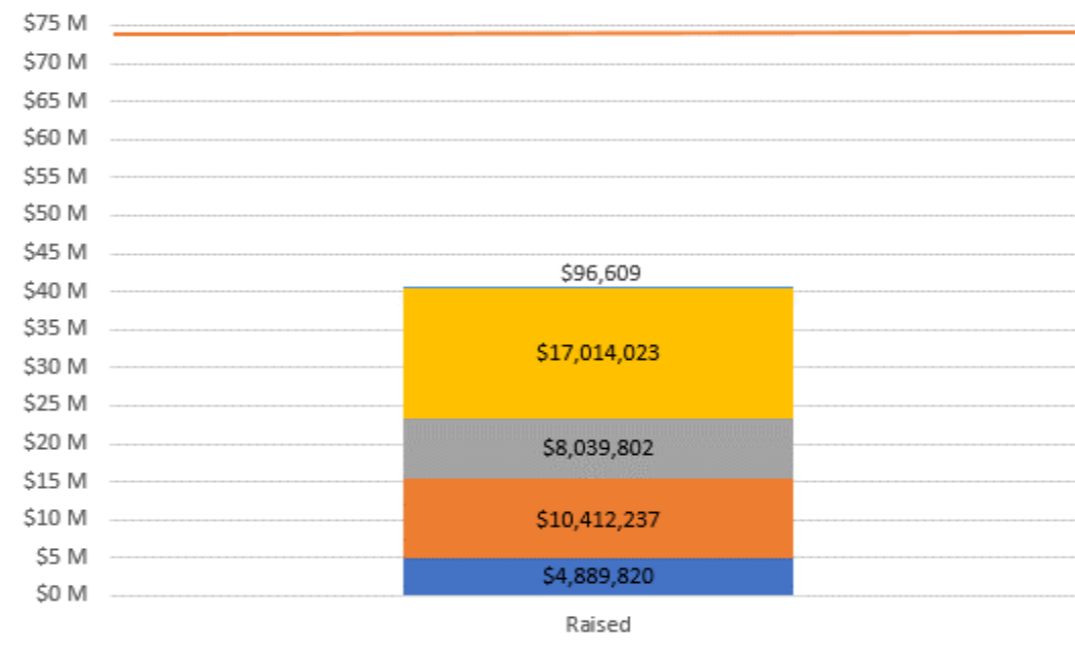
Boards Holiday Party will be held on December 7 at 5:30 pm.

Monthly Fundraising Dashboard Fiscal Year 2024
August 31, 2023

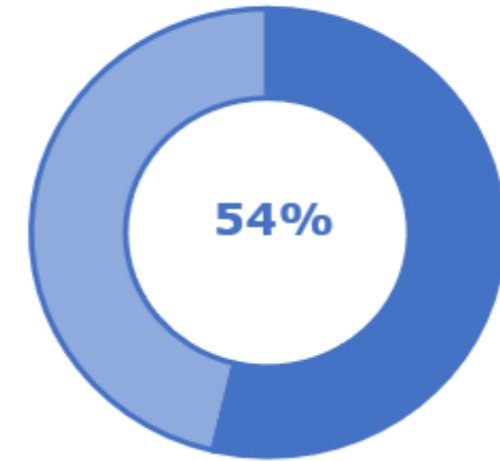
FY24 Totals: 8/1/2023 - 8/31/2023

Dollars:	\$42,723
Donors:	82
Donations:	78
Median Gift:	\$50
Avg. Gift:	\$548

Campaign Total: \$40,452,492



Campaign Progress

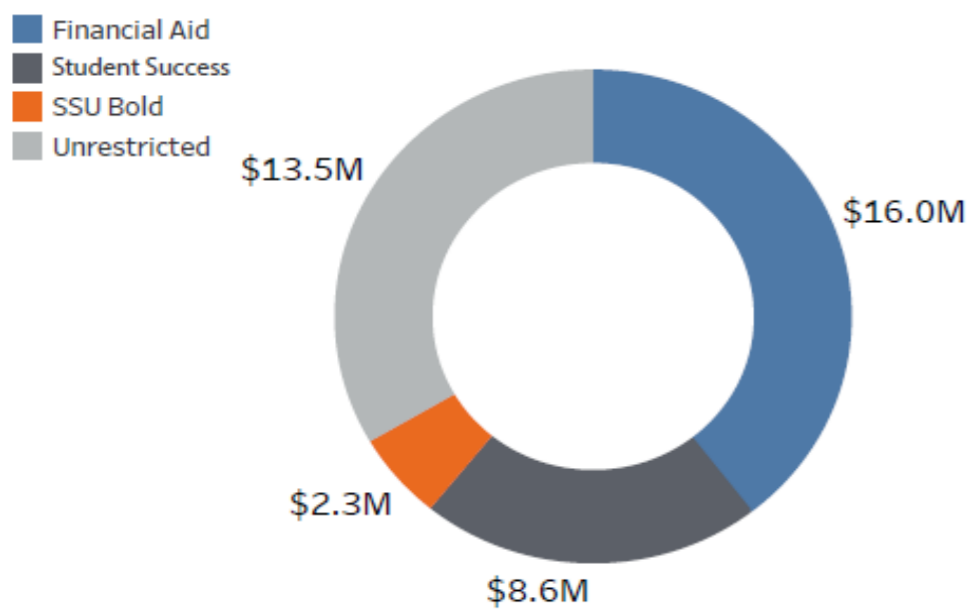


Donors	Donor Base FY24	Donors Retained	% Retained
Retained from previous year	2,688	118	4%

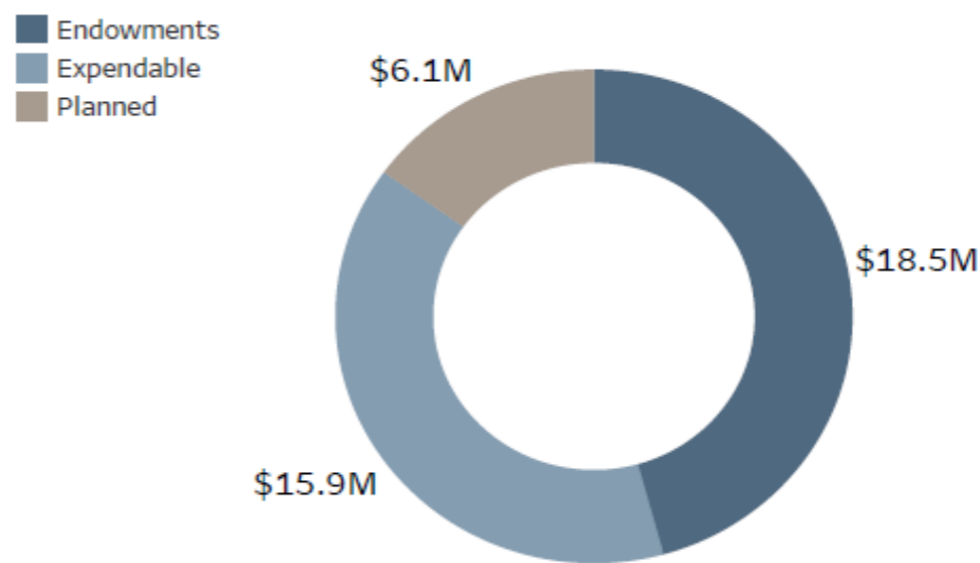
Total: \$40,452,492

Fundraising Analytics

Campaign Priorities



Endowed, Expendable, and Planned



University Fundraising Priority	Goal	Total Raised	Balance	% to Goal
Financial Aid	\$20,000,000	\$15,998,836	\$4,001,164	80%
Student Success	\$25,000,000	\$8,622,499	\$16,377,501	34%
SSU BOLD	\$10,000,000	\$2,312,233	\$7,687,767	23%
Unrestricted	\$20,000,000	\$13,518,924	\$6,481,076	68%
Campaign totals	\$75,000,000	\$40,452,492	\$34,547,508	54%

Gift Type	Goal	Total Raised	Balance	% to Goal
Endowment	\$30,000,000	\$18,508,408	\$11,491,592	62%
Spendable	\$30,000,000	\$15,854,184	\$14,145,816	53%
Planned Gifts	\$15,000,000	\$6,089,900	\$8,910,100	41%
Total	\$75,000,000	\$40,452,492	\$34,547,508	54%

Board Giving

Volunteer Board	Total Campaign Giving	Annual Unrestricted FY24 Participation
Board of Trustees	\$3,561,526	0%
Foundation Board of Directors	\$8,481,373	33%
Alumni Association Board of Directors	\$579,217	0%
Campaign II Steering Committee	\$9,951,079	11%

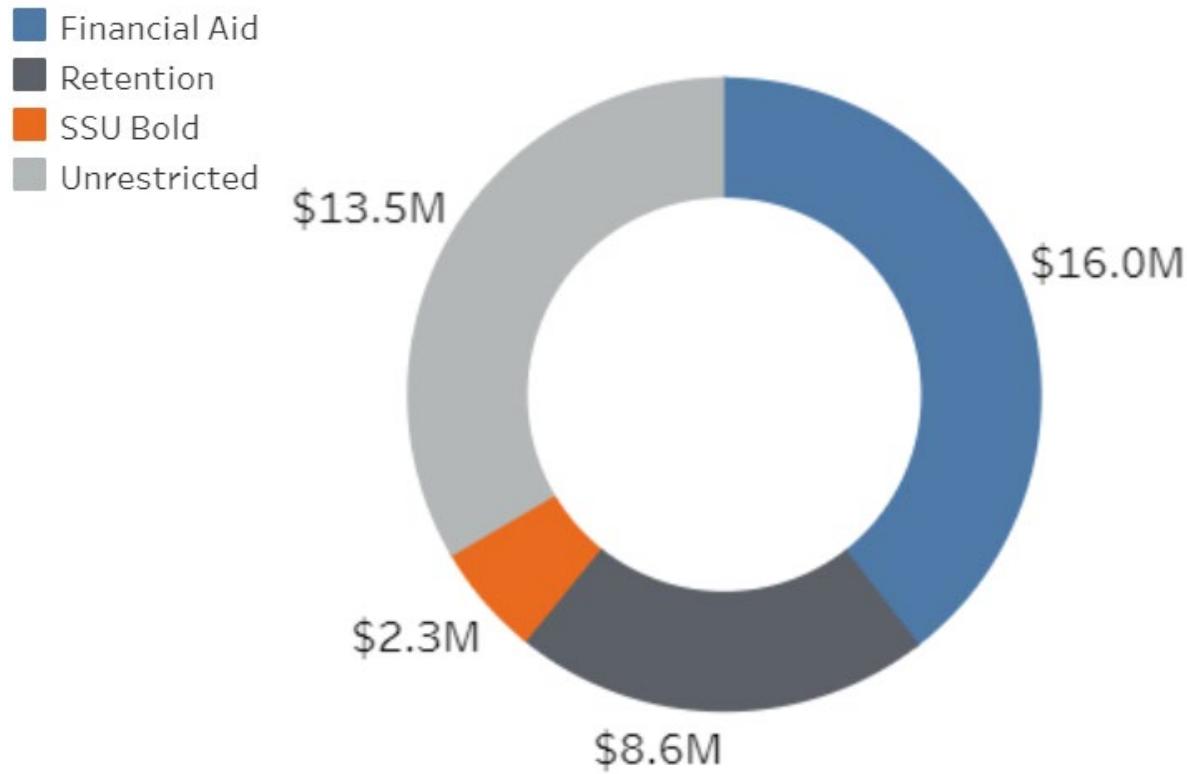
**Meet the Moment:
Impact on the strategic plan**

**MEET THE
MOMENT™**

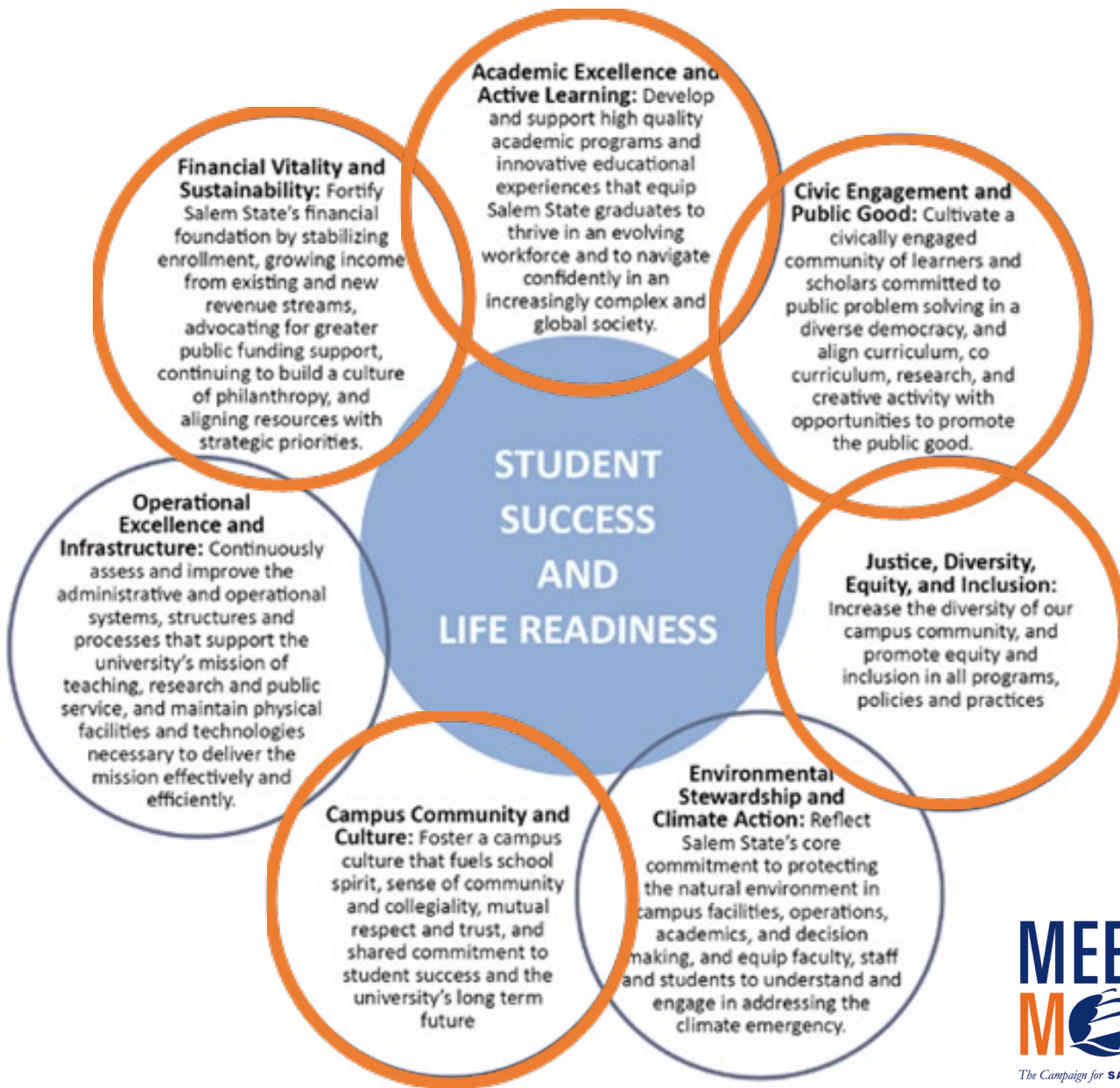
A stylized blue leaf graphic with three main lobes and a central vein, positioned between the 'M' and 'M' of the word 'MOMENT'.

The Campaign for **SALEM STATE UNIVERSITY**

\$40,452,221 raised as of 9-7-2023



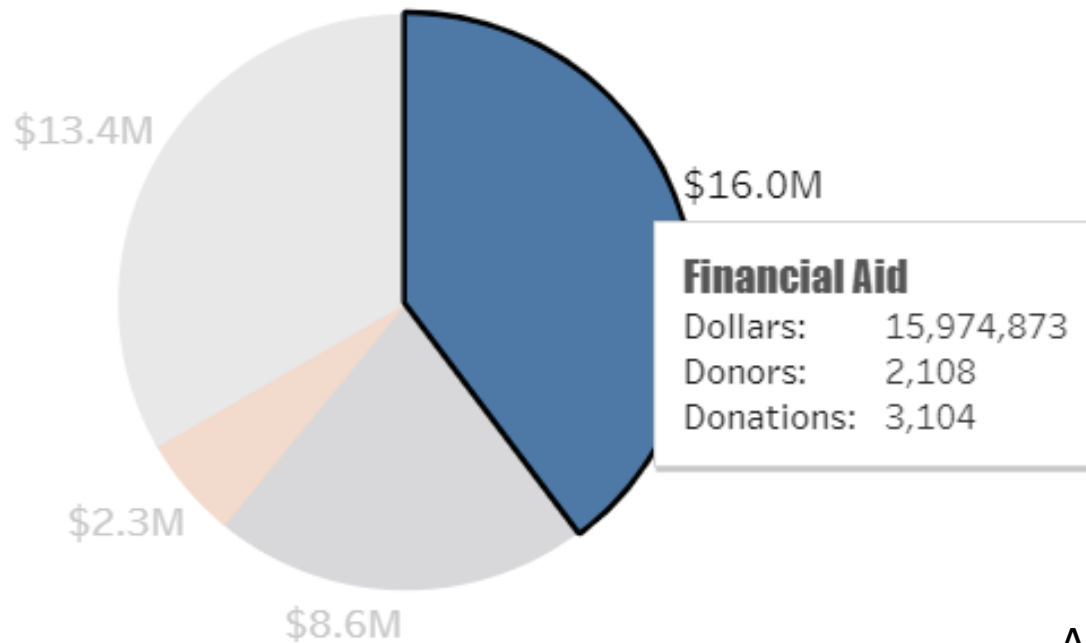
Advancing Our 2023-2028 Strategic Goals



**MEET THE
MOMENT**

The Campaign for SALEM STATE UNIVERSITY

The Meet the Moment Campaign has raised nearly \$16M for student financial assistance



As of June 30, 2023

Financial Vitality and Sustainability

172 Viking Completion Grants



97% graduated

Awards ranged from \$500-\$5,000
totaling \$397,706

615 Student Emergency Fund Recipients since the start of the campaign



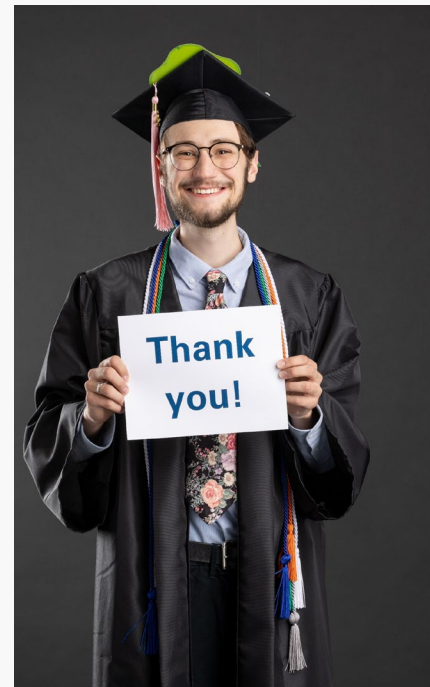
Average award is \$597 totaling \$372,094

Financial Vitality and Sustainability

MEET THE
MOMENT

The Campaign for SALEM STATE UNIVERSITY

Since the start of the campaign (July 2019), **\$2,661,092** has been awarded to **500** viking scholars from **all 30** academic departments. **218** scholars **graduated this May.**



Academic excellence and active learning

MEET THE
MOMENT

The Campaign for SALEM STATE UNIVERSITY



Academic excellence and active learning

Internship Scholarships And Programs – Di Palmas, Katzmans, James’, State Endowment Match



1,047 students from
33 majors received
internship scholarships

Nurturing a future

“If it wasn’t for my advisors,
family and donors, I wouldn’t
be where I am today,
says **Anthony Flores ‘22**,
Bertolon School of Business
internship scholarship

Kathy Murphy '75 Biology Strategic Endowment

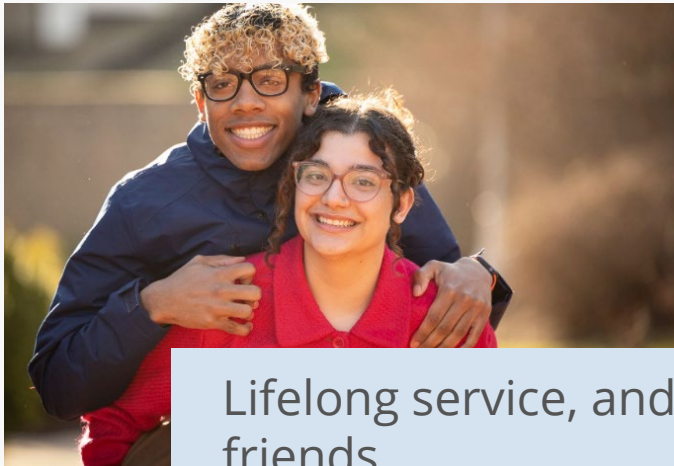


Proud moments, bright futures

“Many of my students are
immigrants—like me—and
funds from awards like these
play a key role in helping
them succeed,” says **Laura
Laranjo, PhD**, assistant
professor of biology.

Civic Engagement and Public Good

Center for Civic Engagement has received \$122,000 of unrestricted funds since the start of the campaign, crucial funding for the Day of Service



Lifelong service, and lifelong friends

“We may have had different majors and backgrounds, but the shared experience of volunteering and moving in early forged a bond that has lasted throughout our college years.” says **Michael Corley '23** and **Taif AlHalabi '23**

220 students participate each year.
12% more persisted to their junior year compared to non-participants.
10% go on to hold leadership roles on campus and in the community.
86% believe it led to meaningful connections with classmates.



Justice, Equity, and Inclusion

HIS-MSI Preparedness



- Traveling to Washington D.C. for the Hispanic Association of Colleges and Universities Capitol Forum on Hispanic Higher Education
- Campus reading group led by HSI faculty fellow
- Building a road map for our strategic plan
- Expanding financial and support resources for students to remove barriers to their education

Building Inclusive Academic Communities



Each pod, including a senior and a junior faculty member, a graduate student, and two undergraduate students, explores how best to make college classrooms inclusive spaces where students of all identities and backgrounds can participate fully in the learning process.

Employee Resource Groups are supported by unrestricted donations via the Office of Inclusive Excellence



Critical engagement, shared cultural identities and experiences

“As humans, we are cultural beings. And when you are new to a space and place, it’s natural to be in a heightened state of awareness as you try to learn and acclimate to a new community, cultural and place. For me, as a newcomer to Massachusetts and the Salem State community, it was critical for me to engage with others who I shared cultural identities and experiences with.”

Nicole Harris, PhD, Associate Dean, McKeown School of Education

Employee resources groups at Salem State include Asian, Black, Latinx, LGBTQ+, Women Empowerment, and Family Caregivers.

Campus Community and Culture

- **Supporting** – Generating new financial resources to foster belonging and innovation.
- **Improving** - Operational advancements fueled by philanthropy.
- **Story-telling** - Campus photoshoots and student, faculty and staff testimonials.
- **Pride-building** – Showcase departments through campaign events and presentations.
- **Collaborating** - New technology features leveraged for other departments.



225 campus attendees at launch events
All 30 academic departments featured in advancement communications
490 current, former and retired faculty and staff members have given to the campaign for a total of **\$758,779**



Campus Community and Culture

“What an amazing and inspiring event last night! Thank you for telling our story in such a compelling way!”

“Students who were at the event were in awe about how much we are doing to support them. When our students are in awe, that is the best thank you that we can receive.”

“Success would not have been possible without the incredible advancement team backing our department and this program!”

“I have always known we had the capacity to be a beacon for our region. The future is bright!”

“Without hesitation, I can honestly say that it was the best event that I have attended in my 35 years at SSU for the way it moved all in attendance to see how we support our students.”

Campus Community and Culture

**MEET THE
MOMENT**

The Campaign for **SALEM STATE UNIVERSITY**



Questions