**Salem State University**
**RFP 2019-03 Campaign Feasibility and Organizational Readiness**
**Addendum I**
**Conference Minutes**
**Date: November 13, 2018**

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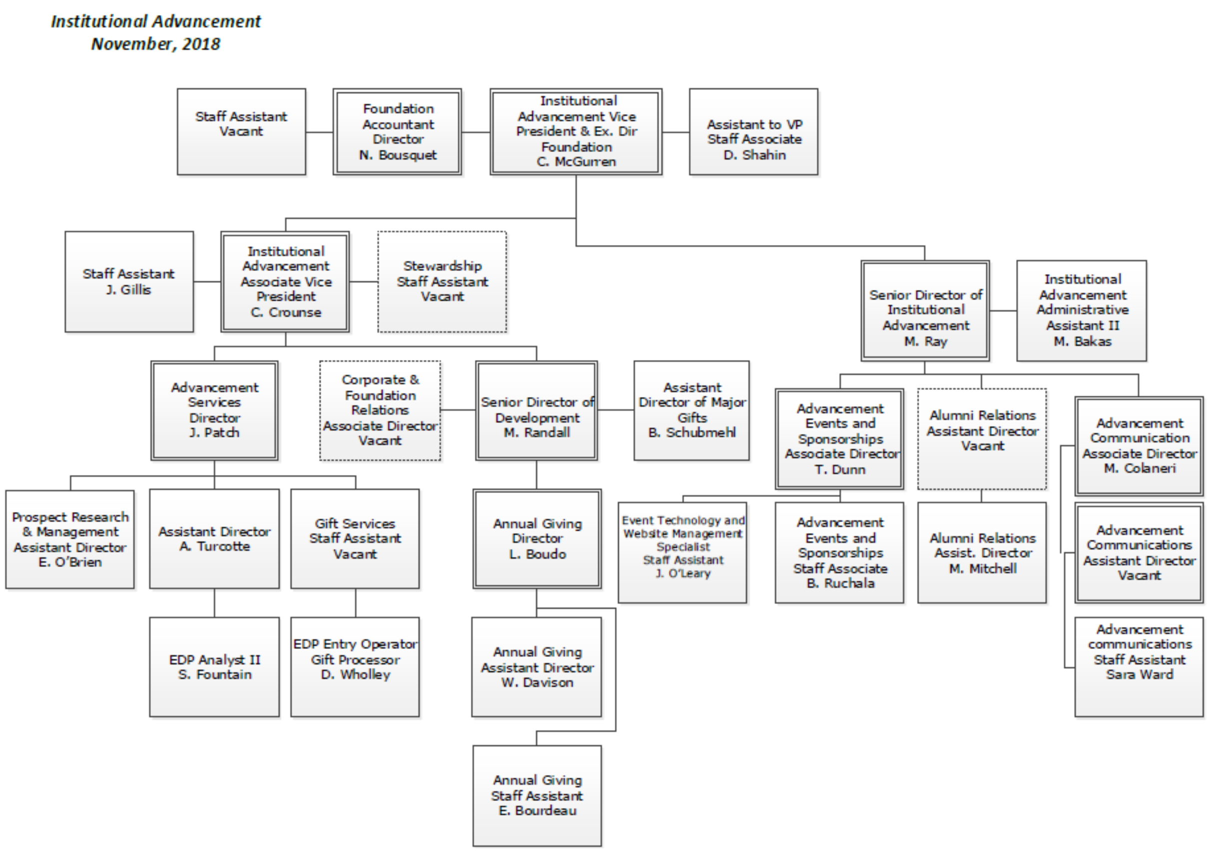
## 1. Timetable

All RFP proposals are due on Wednesday, November 21, 2018 by 3:00pm. Any proposal received after 3:00 pm will not be accepted.

## 2. Questions

**Q: We found an organizational chart for Institutional Advancement on your website that was dated January 18th, 2018. Is that a current chart?**

A: We will look at what is on the website and see if it is up to date and if not, circulate a new one. A new one will be attached in the conference minutes. See attached chart.



**Q: Could you provide an elevator speech about the history of the last campaign, what the priorities were, etc. to see the foundation upon which you are building?**

A: Prior to the 10,000 Reasons Campaign we conducted two smaller mini-campaigns, both of which did not reach their financial goals. Going into the 10,000 Reasons Campaign, we knew we had no choice but to be successful. What was different about the 10,000 Reasons Campaign that we did not have in the prior campaigns was that we did hire outside counsel, CCS, and they were our partners as we launched the campaign. Organizationally, we were able to put a lot of the best practices in place. For example, ratings did not exist at the beginning of the last campaign and we now have roughly 1,200 rated prospects out of our 80,000+ constituents, so we still have a lot of work to do there, but it is something that is now in place.

Another point about the last campaign is that it successfully helped our campus to understand the resource we can be in raising funds to support their initiatives. I think there was a misunderstanding of what we could do for the campus in terms of dollars raised, but as a result of the campaign, we saw that 94% of our campus contributed to the campaign so it really was an outside process as much as an inside process for helping our community to understand the importance of philanthropy and how it plays in terms of making a great change on campus financially. We had a lot of work to do, and still do, in educating our alumni population about the importance of philanthropy, especially because we are a state institution and there is this misnomer that because we are a state institution, we do not need the funds because they come from taxes paid by Massachusetts residents. That is no longer the case, where we hover somewhere between 35-40% funding from the state, we must rely on philanthropy even greater now to pick up and make up the difference. We had a lot of buy-in from volunteers throughout the whole process and that is something we plan on including in this effort.

Priority wise, we focused on people rather than buildings, although we did finish up both the Bertolon and the Center for Creative and Performing Arts Campaigns within the 10,000 Reasons Campaign. We focused on financial assistance, student experience, faculty, and academic programs. Unrestricted played a key role in the campaign as well with $4.4 million raised., And we intend to ensure that is preserved in the next campaign.. In the last campaign, an unrestricted endowment was created with a donor’s gift of $100,000, and it is now reached $1 million as a result of fundraising in honor of our outgoing president, Patricia Meservey.

**Q: On the website the strategic plan is up and transparent, but the question is, are the priorities for the campaign vetted out of that yet? Have they been defined, do you have a case for support, or would that be a part of the study or the expectations as part of the study?**

A: We are going to be drafting the background paper and it will informed by the strategic plan. Each of the strategic planning goals had a group on campus to identify goals within those strategies and we are supposed to see a report of that information at the President’s Executive Council in the next few weeks. From that information, we plan on at least getting a draft done by mid-December, so they will be formulated and certainly vetted through this process as we go out to test the case in the feasibility study process.

**Q:  Your comment about ratings:  Are you interested in knowing about services for wealth screening that any of us may offer?**

A:  Not at this stage.  We are embarking on another project that is related to ratings and are currently looking at an additional 500 that will be rated. This was done using predicted modeling.

**Q:  Is there any thinking yet about the size of the dollar goal of the next campaign?**

A:  Yes.  We presented where we were in terms of a gap on goals that are 50, 75, and $100 million to our Board of Trustees and our Foundation Board, and of course everyone has $100 million stuck in their head when you put a number out like that.  We don't think that $100 million is not possible, it is just whether we have resources to support being successful at this stage and part of this process is to determine, if in fact do look at $100 million, what would we need to be successful?

**Q:  How has development activities looked to the close of the campaign almost two years ago?  Is it at a steady state, have you enjoyed a post-campaign bump, or is the annual activity higher/lower/the same as pre-campaign days?**

A:  Higher than pre-campaign.  We have had a lot of transitions, retired associate vice president, a presidential transition in which we are still introducing President Keenan to key prospects, as well as currently going through a Vice President transition.  In light of that, we've done pretty well with our fundraising.

**Q:  You had mentioned earlier that alumni participation was a big opportunity for you, and I would love to hear about where you are percentage wise and where that is trending?**

A:  I would say it is under 5%, if that gives you an idea of our potential.

**Q:  You mentioned in the last campaign that there was great buy-in of the volunteers. Could you speak a little about the role of the Foundation Board, the Boards of Overseers, and the Alumni Association Board and how they have been involved?**

A:  The Foundation Board and Board of Trustees and Alumni Board are extremely engaged at this stage.  For historical purposes, each of those groups gave at 100% in the last campaign, we had 100% buy-in from our key boards.  The Board of Overseers is being evaluated about its long-term existence, especially with a new leader in place, so it has been on hiatus for about two years now.

**Q:  Who would you consider to be your peer group when you think about fundraising?**

A:  We have had an opportunity to have a direct line to Oswego State University's leadership, and they are one campaign ahead of us, so I would say that they have been someone we have been looking at.  I think within the Massachusetts state system, we look at UMASS Lowell, for example, as someone we might compete with in fundraising or try to aspire to those levels. We are, within the state university system, I believe the most sophisticated system currently. We get a lot of questions from our peers about what we are doing. However, I think we can't look at ourselves anymore.

**Q: In the last campaign, who were your primary contributors?**

A: Alumni first, friends second. Due to our prominence on the North Shore, we have a solid friend backing where local business owners see the value in what we are doing, so several our contributors are local businesses. The largest gift we received in the 10,000 Reasons campaign was from a friend, and the two following were from alumni. We had a minimal support from foundations, so that is an area in which we would benefit from exploring more. Parents tend to never be a good group for us.

**Q: What were the sizes of those gifts?**

A: The friend provided a $3.3 million gift, and over $1 million in each of the other two. In total, there were 6 $1+ million gifts.

**Q: Do you have a budget for this work?**

A: We have not established our budget yet. The Foundations' fiscal year runs from July-June and given that this will be a calendar year project, we will be making decisions based on the best fit as well as the most fiscally responsible. At this point, however, we do not have a number.

**Q: How has the composition of the Foundation Board looked over the years? Is there a pipeline of candidates that you have as possible future board members? How are you feeling about the Board's strength and vitality today?**

A: With the passing of leadership, there is some desire for a few members to see a succession plan to their roles. There has not been a lot of folks that have identified n interest in stepping back which we are encouraged by. We have two new board members coming on, and yes, we have a pipeline. We have been working with gift officers and with the board development committee thinking about who would make sense to come on the board. We want to be thoughtful about not bringing too many new people on at once, but I think that over the next year, we do have a desire to bring a few more members on. The board has evolved since the campaign.

**Q: A follow up question to the wealth screening question that was previously asked: Some of the firms represented here have data analytics groups and can offer predictive modeling and other things that help make more educated decisions about what might be possible in a campaign. Are those the type of services that you would be interested in seeing in a proposal?**

A: We just did a predictive model on our database, and we are in the middle of rating 500 prospects for as a result of that work.

**Q: On the data side of things, how big is the database; how many of them are alumni; what percent of them have email addresses, etc.?**

A: Total is roughly 80,000 with 60,000 being alumni and the other 20,000 being made up of friends, organizations, foundations, and other non-alumni groups. Of those numbers, we have about 35,000 valid emails, but are working our way up to 40,000. By June, we hope to get to having 50% valid emails.

**Q: What percent of the database has screened ratings?**

A: At the beginning of the last campaign, we screened the entire database, but at the time was roughly 60,000. Overall, about 60,000/80,000 have gone through screened ratings, and that was about 8 years ago.

**Q: Would love to hear about how well the faculty has been in terms of being partners in your fundraising?**

A: Wonderful, the last campaign did a lot to help faculty understand how we can be helpful. One example is our Center for Holocaust and Genocide Studies are great collaborators with us. They have an opportunity to bring prospects in, and they bring us into those discussions when it is appropriate and work with us on strategies. They understand the role we can play in getting support for their research or for their teaching. In both ways, they reach out to us when they see an opportunity and welcome us into their thinking, and vice versa. If we ever come across a prospect that would benefit from connecting with a faculty member, they are always more than willing to do that.

**Q: On your proposal you are asking for an assessment of campus culture and environment and its level of readiness. Are you looking at academic leadership as being a central part of this next campaign?**

A: Yes.

**Q: How many of the academic leadership do you expect to involve in the campaign? Are they going to need training, assistance?**

A: All of the above. We have a completely new leadership on campus since the last campaign. I think they are all very willing to and would benefit from fundraising 101.

**Q: What is your major gift level and how many front-line officers do you have working, at, above, and below that level?**

A: We are in the process of reevaluating our major gift level, it is currently at $25,000, but we are in the process of doing a portfolio shift to $100,000 or greater. We have more rated prospects than we know what to do with, which is a good problem, so we want to make sure we are focused on the highest-level prospects. We've been meeting regularly to identify the top 25 prospects, the top 200, and within that, we are going to be doing portfolio rebalancing and then shifting some of the work that major gift officers have been involved in to our annual fund team. We have 4 people currently doing the front-line work, 3 of which have management responsibility, and 1 is exclusively a gift officer. In April, we will have 3.

**Q: It seems that you want this work to be completed in calendar 2019?**

A: Yes, calendar 2019. We plan to take a joint vote between our Foundation Board and the Board of Trustees in January/February of 2020.

**Q: That would be both the organizational readiness and the feasibility study?**

A: Correct.

**Q: How many external interviews would you like to see as part of the feasibility study?**

A: 30-50.

**Q: Is it safe to assume based on your earlier comments about the donors being local, most of those conversations would be in and around Salem?**

A: All. It is a very small radius, believe it or not.

**Q: You had mentioned that there is a lot of highly rated prospects in your pool. How engaged are they?**

A: There is a high level of engagement with donors from the last campaign, but I would say there is a lot of opportunity for engagement with those highly rated prospects because a lot of the work in rating those new prospects has happened within the last year. We are working with the Foundation Board's Fundraising and Engagement Committee on engagement events and trying to bring new rated prospects in to engage them in conversations about what is going on at the university. That is a strategy that we have been working on for about a year and a half and will continue to do.

**Q:  Do you have a sense of whether the donors of the last campaign are still prospects or if they have fatigue from the previous campaign?**

A:  They are still prospects and giving.  We think there is even greater potential.

**Q:  Have you done any recent surveys of your alumni, parents, community that we could have access to as part of the study?**

A:  We have one planned in calendar year 2019, so our partner could even be a part of looking at that and helping us.