



Institutional Advancement Committee Meeting

SMCM Faculty/Staff Liaisons

Friday, September 20, 2024 at 10:00 AM EDT to Friday, September 20, 2024 at 11:00 AM EDT

Virtual Meeting via Zoom

Meeting Details: <https://smcm.zoom.us/j/87919970324>, +1 301 715 8592 US (Washington DC)

Meeting ID: 879 1997 0324

Passcode: 599061

Agenda

I. Open Session Call to Order

II. Discussion Items

A. Enrollment Marketing

- 1. Key Marketing Strategies to Assist Admission Reach Enrollment Goals**
- 2. Alumni Assistance—Alumni Association President Kate Fritz '04**

B. Taking the LEAD Campaign Update

- 1. Progress-to-Date and Fundraising Priorities**
- 2. Foundation Board Impact—Foundation President Dan Schiffman '87**
- 3. Special Initiative—Traditional Residence Hall**

III. Action Items (None)

IV. Information Items

- A. Report from St. Mary's College of Maryland Vice President**
- B. Report from St. Mary's College of Maryland Alumni Association President**
- C. Minutes from June 14, 2024**

V. Motion to Close the Meeting



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE
SEPTEMBER 20, 2024**

**OPEN SESSION
AGENDA**

I. CALL TO ORDER

II. DISCUSSION ITEMS

A. Enrollment Marketing

1. Key Marketing Strategies to Assist Admission Reach Enrollment Goals
2. Alumni Assistance—Alumni Association President Kate Fritz '04

B. Taking the LEAD Campaign Update

1. Progress-to-Date and Fundraising Priorities
2. Foundation Board Impact—Foundation President Dan Schiffman '87
3. Special Initiative—Traditional Residence Hall

III. ACTION ITEMS (None)

IV. INFORMATION ITEMS

- A. Report from St. Mary's College of Maryland Vice President
- B. Report from St. Mary's College of Maryland Alumni Association President
- C. Minutes from June 14, 2024

V. MOTION TO CLOSE THE MEETING

Vote to close the meeting in compliance with Title 10, Subtitle 3 of the General Provisions Article (the Open Meetings Act) for the purpose set forth on the closing statement: To review and discuss items permitted to be discussed in closing session by MD Gen. Prov. Code Ann. 3-305(b) to protect the privacy or reputation of individuals with respect to a matter not related to public business. Matter to be discussed are donors relative to a special traditional hall fundraising project.

A portion of this meeting will be held in closed session.

BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE
REPORT SUMMARY

Date of Meeting: September 20, 2024

Date of Next Meeting: TBD

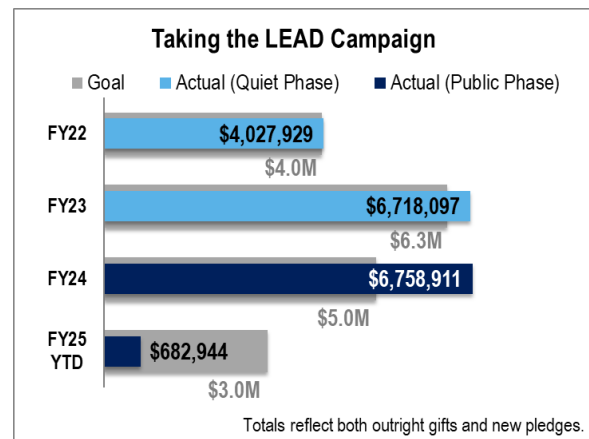
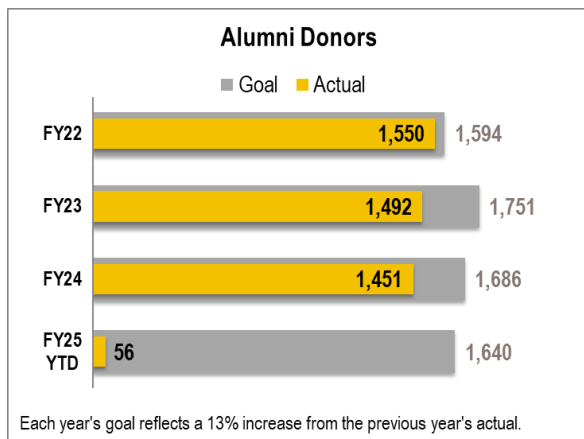
Committee Chair: Gail Harmon

Committee Members: Trustee Chair John Bell '95, Vice Chair Judy Fillius '79, Carlos Alcazar, Kate Fritz '04, Elizabeth Graves '95, Kristen Greenaway, Melanie Rosalez '92, President Tuajuanda Jordan

Staff Members: Vice President Carolyn Curry; Andrew Cognard-Black, faculty liaison; Gretchen Phillips, staff liaison; Dan Schiffman, SMCM Foundation president

Dashboard Metrics:

Revenue and Fundraising



Executive Summary:

Institutional Advancement (IA) aligns with *The Rising Tide* and the institution's mission by strengthening the College's brand and reputation, increasing philanthropy, increasing alumni engagement and assisting the College in becoming known as a cultural hub for the region. The two graphs are among metrics that track progress. IA focuses on annually building the alumni donor base with an FY25 goal of 1,640 alumni donors. The Taking the LEAD campaign reached its \$20M goal a year early. A final push to June 30, 2025, under the theme How High Can We Fly? is underway to secure much-needed LEAD funding. Since July 1, 2024, more than \$682,000 has been raised.

The IAC will meet to review progress-to-date on The Taking the LEAD campaign and discuss a

special major donor project to be initiated. Foundation President Dan Schiffman will touch on ways the Foundation Board is complementing the fundraising efforts.

IAC will also review key strategies IA's integrated marketing team employs to partner with and assist Admission in reaching its enrollment goals. Alumni Association President Kate Fritz will point out ways alumni also assist in this collaborative effort.

Taking the LEAD Campaign Dashboard

How HIGH Can We Fly?

As of September 12, 2024

LEAD Campaign Overview

	CUMULATIVE METRICS
Campaign Goal	\$ 20,000,000
Total Raised to Date (Total Value of Gifts/Pledges)	\$ 21,063,036
Balance of Outstanding Pledges and Unrealized Planned Gifts	\$ 7,573,631
Percent Raised toward \$20m Goal	105.32%

	FY21-FY24 Total	FY2025 YTD (\$3M Goal)	Total Campaign
Annual Total Raised	\$ 20,281,299	\$ 781,737	\$ 21,063,036
Annual Total Number of Major Gift Donors (\$10,000 and up)	\$ 162	\$ 8	\$ 170
Total Value of Major Gifts (\$10,000+)	\$ 17,780,448	\$ 730,000	\$ 18,510,448
Number of New Pledges	88	8	96
Value of New Pledges	\$ 7,929,833	\$ 648,911	\$ 8,578,744
Number of New Planned Gifts	5	1	6
Value of New Planned Gifts	\$ 4,823,735	\$ 50,000	\$ 4,873,735

LEAD Campaign Priorities

Total Dollars Raised	FY21-FY24 Total	FY2025 YTD	Total Campaign
LEAD General Fund	\$ 3,508,497	\$ 552,805	\$ 4,061,302
New Academic Programs—Business Administration	\$ 411,005	\$ -	\$ 411,005
New Academic Programs—Marine Science	\$ 320,368	\$ 55,075	\$ 375,443
New Academic Programs—Neuroscience	\$ 52,190	\$ -	\$ 52,190
New Academic Programs—Performing Arts	\$ 1,568,989	\$ -	\$ 1,568,989
Enhanced Curricular Support	\$ 1,302,549	\$ 76,209	\$ 1,378,758
Co-Curricular Support	\$ 459,376	\$ -	\$ 459,376
Honors College Promise	\$ 303,004	\$ -	\$ 303,004
IDEAA	\$ 6,250	\$ -	\$ 6,250
Scholarship Support	\$ 7,546,356	\$ 63,325	\$ 7,609,681
St. Mary's Fund	\$ 824,096	\$ 4,700	\$ 828,796
Unrestricted Endowment	\$ 2,502,200	\$ -	\$ 2,502,200
Other	\$ 1,476,420	\$ 29,623	\$ 1,506,043
TOTAL	\$ 20,281,299	\$ 781,737	\$ 21,063,036



**BOARD OF TRUSTEES
INSITUTIONAL ADVANCMENT COMMMITTEE**

INSTITUTIONAL ADVANCEMENT REPORT

Date of Meeting: September 20, 2024

Reporter: Carolyn Curry, vice president of Institutional Advancement

Institutional Advancement (IA) is comprised of the six units of development, integrated marketing and communications, alumni relations, events and conference and the Dodge Performing Arts Center (Dodge PAC). IA's strategic focus is to ensure a strong future for St. Mary's College of Maryland in an intensely competitive environment by advancing the College's reputation and brand as the National Public Honors College, inspiring philanthropy, strengthening alumni engagement and establishing the institution as a cultural hub for the region.

IA aligned its four goals with *The Rising Tide* strategic plan through the reporting period July 1, 2024 – August 31, 2024, as illustrated in selected progress points.

Fundraising for the Taking the LEAD Campaign

Giving to date: By June 30, 2024, \$6.8M was raised toward the FY24 \$5M goal, exceeding it by 35% and exceeding the overall campaign goal of \$20M a year ahead of schedule (\$20,281,299). The campaign pivoted to the How High Can We Fly? phase that will culminate June 30, 2025. The FY25 goal is \$3M.

From July 1, 2024, through August 23, 2024, \$682,944 has been raised. Of that total, 85% has been designated for the LEAD General Fund, the campaign's highest priority. Five major FY25 gifts total \$640,000, one of which is six-figures toward the naming of the Dallas P. Dean Learning Commons.

Cultivation and Stewardship: The tactics below are among those underway for cultivation and solicitation.

- *Dallas P. Dean Learning Commons:* On September 27, tied to President Jordan's annual State of the College address to the campus, a naming ceremony will be held for the Dallas P. Dean Learning Commons. The naming was approved by the SMCM Board of Trustees in June 2024 and by the state Board of Public Works in July 2024 in honor of the late alumnae Ms. Dean, a long-time major donor and ambassador for the College and its MAT degree program. The IA team is producing a tribute video and a special feature in the Mulberry Tree magazine it produces.
- *Planned Giving:* A planned giving mini campaign for those 65+ years of age, inclusive of donors who already have made outright campaign gifts and indicated an interest in a

planned gift, is being launched. Foundation Director Scott Raspa '87, who gave the largest planned gift in the College's history, is a major spokesperson and fundraiser. All such booked gifts will be counted toward the Taking the LEAD campaign.

- *Residence Hall project:* The Development team has a major donor-driven initiative under the LEAD campaign underway to renovate restrooms in a traditional hall as a catalyst for future residence hall projects in coming years.
- *Awareness:* To keep the campaign in front of cohorts, the team is working with the Campaign Steering Committee on upcoming appeals, launched a Back to School How High Can We Fly? appeal, added new assets and impact examples to the Taking the LEAD website, and is scheduling six alumni gatherings in tandem with IA's Alumni Relations team across the U.S. for President Jordan. The campaign will also be featured at Hawktoberfest (October 18). The fall Mulberry Tree magazine (circulation 14,000+) featured the impact of the Taking the LEAD campaign to date.
- *Giving Tuesday:* In preparation for the annual online giving event December 3, the Alumni Council, along with the full IA team, have been preparing marketing and other assets; outreach to secure influencers among students, faculty, staff, alumni and others will begin in a few weeks. One goal is to achieve at least 1,000 alumni donors.

Increasing SMCM's standing as the College of Choice

Enrollment Marketing: The integrated marketing team assists in realizing funnel goals as set by Admission through multiple and targeted strategies. Complementing the 12 pieces created by the team since July 2024, QR code scans on them have realized a 43% uptick (Y/Y). Among other strategies:

- Launched in August, a new continuous "visit" digital campaign in Maryland and key out-of-state markets also pushes Open Houses; radio is incorporated regionally.
- Producing short-form videos (15-30 second "reels" of students authentically relaying their SMCM experience and value) to augment enrollment messaging as well as new :30 second College spots and a new recruitment piece to integrate into Open Houses.
- Improving the SMCM website and key enrollment pages based on suggestions courtesy of Trustee Carlos Alcazar and his colleagues. Among them, the team has improved search engine optimization with 10-12 pages among the top Google search results over just two in June 2024. The team has engaged student ambassadors who are supplying their photos of the day to assist in visualizing the SMCM story.
- Launched new targeted transfer advertising and out-of-state strategies.

- While not directly related to enrollment marketing, creating or overhauling a variety of websites that indirectly create impressions and perceptions about the SMCM experience. In addition to keeping fresh and relevant key Admission pages, work is ongoing on sites related to student success, community relations, wellness, campus life, selected majors, and the Presidential Search.

Alumni Engagement

Choosing to have alumni engage in strategic SMCM activities is a goal of the Alumni Relations team through bi-monthly communiques, e-newsletters and social media. Already, X (Twitter) is up 9% Y/Y with audience growth and Instagram up 14%; engagement rates on all platforms are soaring.

The team is currently overseeing the College's Hawktoberfest (October 18-19) which primarily focuses on parents and families, but also alumni, students, faculty and staff. In FY24, total registration was just under 1,800 with more than 1,100 parents attending and the largest number of students (380). In the first two days of September registration, nearly 350 people registered. A primary goal of the event is to underscore to all cohorts attending that SMCM is the "right" choice for earning a degree, to invest in, to engage in or to volunteer talent and time.

In addition to *Giving Tuesday*, which the team oversees, other alumni engagement initiatives underway include:

- *Mentor-a-Seahawk*: With a goal of 342 alumni volunteers, active recruitment is underway to assist the Center for Professional and Career Development pair mentors with students for career guidance, advice and networking opportunities. In spring 2024, 285 alumni volunteers met with 450 students under this program.
- *Refer-a-Seahawk*: Alumni refer prospects to Admissions; efforts are underway to meet or exceed the 67-referral goal set over the 56 achieved in FY24.

Advancing The National Public Honors College and LEAD brand and reputation

Among the tactics employed in the reporting period:

- *Focus on rankings and accolades*: With the College rising from #11 to #4 in the nation in the Princeton Review's "Making an Impact" ranking, the marketing team is capitalizing on this by licensing the ranking and incorporating it into strategic enrollment messages. The ranking is derived based on student surveys about on-campus engagement, sustainability and opportunities in student government. Complementing this ranking are the aforementioned student video reels under production. A new push: the team is

driving traffic to the College's ranking page, up 16% Y/Y July 1- August 31, 2024, with 677 views and 560 users (up 18%).

- *Increasing viewing of news posts:* In addition to increasing FY25 earned media (goal of 10% unique posts over FY24), the SMCM news posts have seen an uptick in Y/Y web visitors at 5.9% (July 1 – August 31, 2024). This measures individual users who visit the SMCM Newsroom at inside.smcm.edu/news and who also access the link at the bottom of every web page to read selected stories posted there.
- *Leveraging the brand internally:* The team trained the Academic Affairs program student ambassadors on brand messaging and assets. Among other initiatives:
 - For the past year, the team has published a “Brand Tip of the Month” within the SMCMDaily (for faculty and staff) and The Current (for students) newsletters it produces each day. Daily page views for the tips are 20% higher than in the spring.
 - The Brand Resources web pages for the campus community now offer an online tool for designing flyers, posters and social media “art” popular with students, faculty and staff alike.
 - The September 27 State of the College will feature an all-campus reception where the IA team will be distributing new and specially produced College branded swag for all who attend.

Enhancing St. Mary's College of Maryland as a cultural hub and sought-after resource

- *Cultural Hub:* The Dodge Performing Arts Center (Dodge PAC) has booked 11 premiere ticketed performances to date though the spring now open for sales (does not include student or free performances or external vendors renting the facilities). Among the eclectic mix are the Twain Laughing to the Polls (November 27); Nobuntu, an internationally celebrated female a cappella quartet from Zimbabwe (October 4); the jazz Brubeck Brothers Quartet with Camille Thurman (November 1); and traditional Irish music with Danu (March 1). In FY24, the Dodge PAC increased attendance over FY23 by 51% with 31,918 attendees including 85 events/concerts. In the reporting period July 1- August 31, 2024, the Dodge PAC hosted 26 events and 1,915 people.
- *51st Governor's Cup Yacht Race:* IA's Alumni Relations and Events and Conferences teams oversaw the onsite day and evening events and support for post-race activities in August. Ninety boats registered (99 in FY24). A record 11 local food truck vendors participated in a concerted effort to partner with the community. A post-survey to the

racers (24.7% response rate) yielded 100% race registration satisfaction, 60% good/very good post-race experience and numerous suggestions for future races.

- *Top-tier Event Experience:* The Events and Conferences team partners with the full IA staff and others across campus to ensure the College delivers to internal and external audiences the best experiences possible. Whether taking a leadership or supporting role, the team touches branding, customer service, logistical needs, staging receptions, décor and messaging. Over the summer, IA supported five River Concerts (one was cancelled due to rain) with about 5,900 attendees. It also produced four IA VIP receptions held during each River Concert hosting a total of more than 180 guests. The Events and Conferences team provided logistical, onsite and liaison support to five summer clients, including the National Hispanic Institute, Brendan Sailing and the Maryland Special Olympics Regatta, totaling 532 attendees. The team has just completed support for the Opening Convocation August 23 and is currently training campus users on how to book venues and events through its online support software.

Currently, IA is overseeing campus teams producing September 27 marque events mentioned earlier, Hawktoberfest, Giving Tuesday and The Sacred Journey.

- *Marketing:* Monthly event ads and visit/Open House ads are running in print and radio in regional placements. Digital advertising for the Dodge PAC (July 2024 – August 31, 2024) has reached more than 80,000 targeted users in Southern Maryland and in Baltimore, D.C. and Virginia with 3,024 engagements (3.7% rate). Altogether, print, radio and digital ads have driven 5,374 page visits to the Dodge PAC site for the first three promoted fall events.

Of note, the Commemorative to Enslaved Peoples of Southern Maryland is now featured in the state's tourism magazine and in the Maryland Office of Tourism's new "Freedom, Faith & Family" brochure on the Underground Railroad.



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

SMCM ALUMNI ASSOCIATION REPORT

Date of Meeting: September 20, 2024

Reporter: Kate Fritz '04, SMCM Alumni Association president

The Alumni Council met for its annual retreat in mid-August, where it laid out the priorities for the year ahead. Our three focus areas for the year include:

- Engage our existing and future alumni base
- Engage our Alumni Council members
- Continue operational excellence

The Council plans to continue to build on the success of existing, key College events like Hawktoberfest, Alumni Weekend, Bay-to-Bay Service Days, among others. These events offer the Council opportunities to truly prioritize and focus its efforts to engage existing and future alumni.

President Tuajuanda Jordan joined our meeting, and offered us an open dialog regarding her tenure, her legacy and what she believes the College needs next in a President.

The Council is beginning its work preparing for *Giving Tuesday* on December 3, with a goal to raise \$30K from the current and former Alumni Council members to fund this year's Alumni Council Challenge which engages the broader SMCM community. We hope the Trustees will join the efforts again this year for another successful fundraising effort that supports President Jordan's LEAD initiative, academic departments, student clubs, athletes and so much more.

The Council recently welcomed new Chapter Presidents in Philadelphia and Western Maryland, filling two key vacancies. To our objective of engaging our existing and future alumni base, we are working to fill the remaining chapter vacancies in Washington DC, Chicago, Boston, Denver and the California Bay area before Bay-to-Bay Service Days in April.

Our next Council meeting takes place November 2, 2024.



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

**OPEN SESSION
MINUTES**

Date of Meeting: June 14, 2024

Status of Minutes: Draft

Institutional Advancement Committee Members Present: Committee Chair Gail Harmon, Talib Horne '93, Judith Fillius '79, Elizabeth Graves '95, Kristen Greenaway, President Tuajuanda Jordan

Member Absent: Peg Duchesne '77, Kate Fritz '04, Andrew Cognard-Black (faculty liaison), Gretchen Phillips (staff liaison)

Staff Member: Vice President for Institutional Advancement Carolyn Curry

Others Present: Trustee Chair John Bell '95, Betsy Barreto, Mary Broadwater, Donny Bryan '73, Adrienne Dozier, David Taylor, Aaron Tomarchio '96

Chair Harmon motioned to close the meeting to discuss the naming of a building, seconded by Kristen Greenaway.

Names of members voting aye: Chair Gail Harmon, Talib Horne '93, Judith Fillius '79, Elizabeth Graves '95, Kristen Greenaway, President Tuajuanda Jordan

Members Opposed: None

Abstaining: None

The meeting went into closed session at 9:43 a.m.

Statutory authority to close session: In accordance with Md. Gen. Prov. Code Ann. § 3-305 (b) to discuss the matters set forth on the closing statement, specifically: (13) To comply with a specific, constitutional, statutory, or judicially imposed requirement that prevents public disclosures about a particular proceeding or matter – which in this case is the financial information of a prospective donor that are is not subject to disclosure under the Maryland Public Information Act.

**STATEMENT REGARDING CLOSING A MEETING OF THE BOARD OF TRUSTEES
OF ST. MARY'S COLLEGE OF MARYLAND**

INSTITUTIONAL ADVANCEMENT COMMITTEE

Date: September 20, 2024
Time: 10:00 a.m.
Location: Virtual Meeting

STATUTORY AUTHORITY TO CLOSE A SESSION

Md. Gen. Prov. Code Ann. '3-305 (b):

- (1) To discuss:
- (i) The appointment, employment, assignment, promotion, discipline, demotion, compensation, removal, resignation, or performance evaluation of appointees, employees, or officials over whom it has jurisdiction; or
 - (ii) Any other personnel matter that affects one or more specific individuals.
- (2) To protect the privacy or reputation of individuals with respect to a matter that is not related to public business.
- (3) To consider the acquisition of real property for a public purpose and matters directly related thereto.
- (4) To consider a preliminary matter that concerns the proposal for a business or industrial organization to locate, expand, or remain in the State.
- (5) To consider the investment of public funds.
- (6) To consider the marketing of public securities.
- (7) To consult with counsel to obtain legal advice on a legal matter.
- (8) To consult with staff, consultants, or other individuals about pending or potential litigation.
- (9) To conduct collective bargaining negotiations or consider matters that relate to the negotiations.

-
- (10) To discuss public security, if the public body determines that public discussions would constitute a risk to the public or public security, including:
- (i) the deployment of fire and police services and staff; and
 - (ii) the development and implementation of emergency plans.
- (11) To prepare, administer or grade a scholastic, licensing, or qualifying examination.
- (12) To conduct or discuss an investigative proceeding on actual or possible criminal conduct.
- (13) To comply with a specific constitutional, statutory, or judicially imposed requirement that prevents public disclosures about a particular proceeding or matter.
- (14) Before a contract is awarded or bids are opened, to discuss a matter directly related to a negotiation strategy or the contents of a bid or proposal, if public discussion or disclosure would adversely impact the ability of the public body to participate in the competitive bidding or proposal process.
- (15) Administrative function.

TOPICS TO BE DISCUSSED: Matter to be discussed are donors relative to a special traditional hall fundraising project.

REASON FOR CLOSING: To protect the privacy and identity of individuals or units that may be affected; to protect the privacy of an individual who is considering making a naming gift.