



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE
January 14, 2025**

AGENDA

- I. CALL TO ORDER**
 - A. Welcome & Opening Remarks – Trustee Judy Fillius, Committee Chair
 - B. Approval of Agenda
- II. APPROVAL OF MINUTES**
 - A. Review and approval of minutes from the Institutional Advancement Committee meeting on October 02, 2025
- III. DIVISION OF INSTITUTIONAL ADVANCEMENT REPORT**
 - A. SMCM Foundation Update – Financial Snapshot
 - B. SMCM Foundation Board Presentation
 - C. Giving Tuesday Report
- IV. DISCUSSION ITEMS**
 - A. Ark & Dove Gala Recommendations
 - B. IA Priority Recommendations to the Full Board (e.g. Renovation of Existing Student Housing)
 - C. Fundraising Ideas
- V. INTEGRATED MARKETING & ALUMNI RELATIONS**
 - A. Alumni Engagement - Alumni Association President
 - B. Report from Integrated Marketing & Communications
- VI. ADJOURNMENT**



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

MINUTES

Date of Meeting: October 2, 2025

Status of Minutes: DRAFT

Institutional Advancement Committee Members Present: Committee Chair Judy Fillius '79, Trustee Chair John Bell '95, Trustee Vice Chair Paula Collins, Melanie Rosalez '92, Kate Fritz '04, Donny Bryan '73, President Rhonda Phillips,

Members Absent: Susan Bass, Jesse Price, Elizabeth Graves, Kristen Greenway

Staff Member: Interim Vice President for Institutional Advancement Stephen L. McDaniel, CFRE

Others Present: Amanda VerMeulen (faculty liaison), Gretchen Phillips (staff liaison), Sarah Miller Martin, Chuck Steenburgh, David Taylor, Jerri Howland, Katie Gantz, Betsy Barreto, David Sushinsky, Jackie Wright

Chair Judy Fillius opened the meeting at 11:01 a.m., noting the new roster of committee members and expressing appreciation for everyone's participation. She reflected on the success of the past few years with the *Taking the LEAD* campaign, noting that the previous fiscal year ended successfully. Despite this success, she acknowledged that colleges everywhere are facing current challenges and emphasized the importance of maintaining momentum and upholding St. Mary's College's honors promise – a steadfast commitment to students and their families.

She highlighted that the upcoming year represents a time of transition, with a new president, Dr. Rhonda Phillips, and Interim Vice President for Institutional Advancement, Stephen McDaniel, CFRE.

Chair Fillius reiterated the committee's charge to continue elevating the College's profile and reputation while strengthening fundraising and philanthropic efforts.

Remarks by SMCM President Rhonda Phillips

Chair Fillius invited SMCM President Rhonda Phillips to say a few words to open the meeting.

President Phillips thanked the committee for their service and continued support of St. Mary's College, emphasizing how deeply she values their contributions. She noted that she would need to leave shortly to attend a faculty meeting as part of her 100 Day Listening Tour but wanted to underscore the critical importance of Institutional Advancement. President Phillips explained that IA plays a central role in fundraising, alumni relations, communications, and event planning – all key areas in supporting the College's mission.

She stated that one of her top priorities is expanding fundraising efforts and strengthening alumni engagement, both locally and nationally. President Phillips acknowledged the work underway under Interim VP McDaniel to explore new and expanded approaches to fundraising, including developing an annual giving plan and continuing to enhance the annual Day of Giving. She expressed enthusiasm about adopting best practices and using this post-campaign period as an opportunity to plan for the College's next phase of growth.

President Phillips concluded by thanking everyone again for their dedication and partnership.

President Phillips exited the meeting.

Approval of Minutes – IAC Committee Meeting on April 16, 2025

Chair Fillius presented the minutes from the April 16, 2025, Institutional Advancement Committee and asked if there was any discussion. Here none, she called for a motion to approve.

MOTION: Trustee Melanie Rosalez moved to approve the minutes from the Institutional Advancement Committee Meeting of April 16, 2025; Board of Trustees Chair John Bell seconded. All were in favor, the motion carried.

Division of Institutional Advancement Report

Chair Fillius invited VP McDaniel to deliver his Institutional Advancement Report to the committee.

VP McDaniel thanked Chair Fillius and the committee for their continued dedication and contributions to St. Mary's College and acknowledged several key staff members present, including Director of Foundation Finance and Administration Jackie Wright, who he identified as a crucial resource for maintaining the integrity of campaign records and assisting with financial details.

Taking the LEAD Campaign Wrap-up

McDaniel reported that the *Taking the LEAD* campaign had been an exceptional success, ultimately raising \$23.3M – 116% of the original target of \$20M. He highlighted that this achievement was made possible by over 10,000 donors contributing over the five-year campaign period. He noted that the donors to the campaign were recognized in the latest edition of *The Mulberry Tree*.

VP McDaniel reported that \$12.6M in funds have been used to date, with \$1.3M in outstanding pledges and a \$5M unrealized planned gift included in the total. The campaign increased the College's endowment by \$4.4M. Funds raised beyond the goal supported academic programs and the refurbishment of Prince George Hall, the first target of a planned residence hall renovation project.

He emphasized that these results mark just the beginning of continued efforts to sustain the College's growth and financial health, leading into an upcoming annual fund campaign.

McDaniel noted that a detailed dashboard report had been shared with committee members, breaking down campaign results by gift level, category, and restriction status.

Chair Fillius noted some prior confusion between the *Taking the LEAD* campaign, the St. Mary's Fund, the Honors College Promise, and the unrestricted endowment. She requested that future materials clearly differentiate these categories, noting that while the Honors College Promise supports internships, study abroad, and research opportunities, the LEAD General Fund serves as an enabling fund with broader flexibility. Trustee Donnie Bryan echoed Chair Fillius thoughts, suggesting that the Board receive a future presentation clarifying the roles and uses of the Foundation, quasi-endowment, and Institutional Advancement funds to help both new and existing members better understand their function. Chair Fillius agreed, noting that such a session would serve as a valuable orientation and refresher.

100-Day Listening Tour

VP McDaniel detailed President Phillips' 100-Day Tour, which ran July 1-October 9. The tour included engagements with alumni, faculty, civic leaders, and community members across Maryland. VP McDaniel explained that the purpose of these meetings was to allow the President to hear directly from stakeholders about the College's opportunities and challenges as she prepares to articulate her vision for St. Mary's. He noted that Institutional Advancement played a key role in coordinating these efforts.

Annual Fund Campaign

VP McDaniel introduced the Annual Fund Campaign, calling it the "bloodline" of Institutional Advancement. Aiming to raise \$2.5–\$3 million by June 30, the campaign will support scholarships, student success, faculty excellence, and campus life. He highlighted the upcoming Day of Giving (December 2, 2025) and emphasized that annual giving cultivates future major and planned donors. He outlined a broad outreach strategy involving alumni, faculty, staff, parents, and community partners, stressing the value of unrestricted gifts for meeting immediate needs. He encouraged board members to assist through advocacy and donor engagement.

Chair Fillius praised the initiative, noting that transitioning from the LEAD Campaign to an annual model is key to long-term sustainability. She underscored the need to reconnect with the College's 15,000 alumni and leverage past data to expand participation.

VP McDaniel agreed, noting that the 10,000 donors from the LEAD Campaign form a strong base but that sustained growth will depend on consistent, year-round engagement.

Alumni Association Report

Trustee Kate Fritz, Alumni Association President, provided an update on Alumni Council activities, noting that the group held its annual retreat in August 2025 to set priorities for the year. The Council identified three main goals:

- **Engaging Alumni Council Members** – Encouraging participation across committees,

volunteer opportunities, and regional and campus events.

- **Modernizing Engagement Initiatives** – Reviewing and updating programs such as regional alumni chapters, Mentor-a-Seahawk, and Refer-a-Seahawk to strengthen outreach.
- **Enhancing Alumni Association Engagement Programs** – Expanding participation in key events including Alumni Weekend, Giving Tuesday, Bay to Bay Service Days, and Spring Break-a-Sweat.

Trustee Fritz detailed several areas of focus for the year:

- **Regional Chapters:** With a new VP of Chapter Activities, Ken Benjies, the Council is working to fill leadership vacancies and expand outreach. New presidents have been recruited for the Boston and Washington, D.C. Metro chapters. Each regional chapter will host a project during Bay-to-Bay Service Days in April.
- **Alumni Scholarships:** The Council aims to strengthen the Alumni Legacy Scholarship Fund, currently supporting two legacy students per year. Efforts include benchmarking against peer institutions, reviewing MOUs, and enhancing family legacy programming during events like move-in day and Hawktoberfest.
- **Alumni Awards:** The Council will expand the nomination pipeline and increase visibility for alumni award recipients throughout the year and during Alumni Weekend.

Fritz concluded by previewing upcoming events: Hawktoberfest (October 17–18, 2025), which typically attracts more than 1,200 participants, and Giving Tuesday (December 2, 2025), a cornerstone fundraising event that raised more than \$415,000 from nearly 4,000 donors in 2024.

Chair Fillius commended Fritz and her team, noting their energy and impact. She asked about feedback from alumni living outside the DMV area.

Executive Director of Alumni Relations David Sushinsky responded that the team expanded out-of-state engagement over the past year with tours in California, New England, and Florida. He emphasized that virtual programming launched during the COVID-19 pandemic, such as the virtual 5K, continues to connect alumni nationwide while acknowledging the value of in-person events, noting that alumni appreciate direct engagement and that Giving Tuesday has helped reengage many donors.

Chair Fillius added a personal endorsement of the Mentor-a-Seahawk program, sharing her positive experience mentoring two students. She noted the program's flexibility for both local and remote participants and praised the insight and energy it brings to mentors and mentees alike.

Fillius concluded by expressing appreciation to Trustee Fritz, Sushinsky, and VP McDaniel for their leadership and dedication to alumni engagement.

Integrated Marketing & Communications Report

3 Enrollment Marketing

Chuck Steenburgh reported on recent developments in Integrated Marketing and Communications, highlighting the College's new partnership with 3 Enrollment Marketing, a boutique firm selected after reviewing over 20 proposals. The firm replaces a more traditional vendor and will shift focus from event-based recruitment to year-round digital engagement, nurturing prospects throughout the enrollment funnel. Early results have been strong, with the September open house seeing a 15% attendance increase over 2024 using less than one-third of the prior budget. Full implementation of the new strategy is expected by the end of October.

Board of Trustees Vice Chair Paula Collins raised concerns about the growing national narrative questioning the value of higher education and asked how marketing efforts address this, particularly for first-generation students. Steenburgh noted that St. Mary's attracts students who value a traditional residential experience but said messaging emphasizes the lead component of the liberal arts curriculum and alumni success stories to demonstrate practical outcomes. He referenced a Washington Monthly op-ed by President Phillips on the return on investment of a college degree. Collins encouraged outreach to parents and counselors who influence college decisions.

Trustee Melanie Rosalez suggested benchmarking against peer institutions to understand how others are addressing the "to-go-or-not-to-go" question in their marketing. She proposed that the new marketing partner could assist with gathering comparative insights. Steenburgh agreed that this was a valuable idea.

Judy Fillius underscored the importance of highlighting internships and practical experiences, while Melanie Rosalez suggested benchmarking peer institutions on strategies addressing whether to pursue college at all. Steenburgh agreed this would be valuable. Steenburgh clarified that the College's former marketing partner, CCA, helped develop the National Public Honors College rebrand and may be re-engaged for future creative and reputation-building projects.

SMCM Website Update

Steenburgh detailed recent updates to the College's website. Following a comprehensive review by former Trustee Alcazar's firm, Culture ONE World, the web development team implemented a complete redesign of academic program pages over the summer. The revamped pages now feature consistent layouts, improved visuals, clearer navigation, and organized information through a button structure. Each page includes key details about majors and minors, links to the course catalog, highlights from the Honors College Promise, and features on facilities and alumni outcomes. Student testimonials, program-specific news feeds, and eye-catching visuals further enhance user experience.

Steenburgh encouraged trustees to explore the updated pages, noting that the redesign better showcases the College's academic offerings and institutional strengths. He also shared that the President's website now includes a dedicated section for the First 100 Days Listening Tour, featuring video messages from President Phillips and a timeline summarizing her engagement

activities. This section, updated weekly, offers the community a transparent view of the President's early initiatives and outreach.

Chair Fillius commended the improvements, and Steenburgh closed by recognizing the web team's effort and inviting continued feedback.

SMCM Foundation Report

VP McDaniel reported that the SMCM Foundation continues to be in strong standing. He noted the Joint Investment Advisory Committee (JIAC), recently completed a regularly scheduled RFP process to select a new investment advisor. Wright reported that the Foundation received 20 proposals, six of which were disqualified upon review. The remaining 14 were fully evaluated, and J.P. Morgan was ultimately selected to remain in place as the investment advisor.

McDaniel added that in addition to providing investment advisory services, J.P. Morgan has engaged several St. Mary's College students as interns, offering them valuable exposure to the financial industry. He clarified that while the College's endowment is often referenced as \$23M, the total endowment is actually more than \$40M. J.P. Morgan will manage the entire portfolio, and the Foundation intends to provide greater transparency through dashboard-style investment performance reports at future board meetings.

He also confirmed that the Foundation's audit is nearing completion. According to McDaniel, the Foundation remains fully compliant with IRS requirements and is managed efficiently, reflecting its overall good financial health.

In response to a question from Judy Fillius regarding the amount distributed annually from the Foundation to the College, McDaniel explained that the Foundation determines this rate based on investment policies reviewed each year. Jackie Wright confirmed that the current year's distribution rate is 4.95%, nearly 5%, drawn only from earned income while preserving the principal.

Strategic Discussion: FY26 Advancement Priorities and Trustee Engagement

Chair Fillius invited VP McDaniel to address key considerations based on prior discussions and notes. He outlined several areas of focus for trustee engagement, emphasizing the importance of active collaboration between trustees and Institutional Advancement. He identified five key "touch points" for meaningful participation:

- **Philanthropic Support:** McDaniel encouraged trustees to make a personal gift to the College at a level meaningful to them, underscoring the importance of achieving 100% trustee participation in annual giving. He also invited trustees to assist in cultivating donors, particularly through participation in donor dinners, campus tours, and similar engagement events.
- **Stewardship:** He stressed the value of trustees expressing appreciation directly to donors—through handwritten notes, phone calls, or personal outreach—remarking that nothing reinforces gratitude more than hearing "thank you" from a trustee.

- **Advocacy and Ambassadorship:** McDaniel urged trustees to act as champions for the College, sharing positive messages and promoting its reputation among their networks. He noted that trustees' relationships with potential donors make their engagement vital to advancement work.
- **Planning and Collaboration:** Trustees were invited to serve as sounding boards for Institutional Advancement strategies, reflecting McDaniel belief that fundraising succeeds best through close trustee-staff collaboration rather than operating in silos. He added that faculty and staff recognition, such as trustee thank-you notes, also fosters goodwill and strengthens community ties.
- **Long-Term Support and Legacy Giving:** McDaniel highlighted the new Free Will platform, which allows individuals to create legally binding wills online at no cost, with the opportunity to include St. Mary's College as a beneficiary. He encouraged trustees to consider establishing or contributing to endowments and to include the College in their estate plans.

VP McDaniel also discussed mentorship opportunities, inviting trustees to connect with students and model engagement in the College's life. McDaniel shared plans to establish a program to strengthen ties with Trustees Emeriti, ensuring lifelong connection and involvement. He emphasized that volunteer leadership is vital to institutional success, calling trustees the "first line" of volunteer engagement.

Trustee Bell expressed support for VP McDaniel message, sharing his personal story of re-engagement with St. Mary's College after a decade-long absence. He credited the Institutional Advancement team for reconnecting him and noted how that outreach led to long-term service on both the Foundation and College boards. Trustee Bell suggested several practical steps to strengthen trustee participation, including:

- Preparing thank-you letters for trustees to sign during upcoming board meetings.
- Improving advance communication and calendar sharing to increase trustee attendance at donor and campus events.
- Enhancing internship and mentorship programs by engaging trustees and alumni to support student opportunities and foster lifelong connections to the College.

Trustee Bell also commended the Free Will initiative as an innovative approach to encouraging planned giving.

Chair Fillius thanked Trustee Bell for his comments and reiterated her commitment to advancing these priorities. She proposed preparing summary slides for the upcoming board meeting, in collaboration with McDaniel, to highlight key advancement priorities and trustee engagement actions. She also noted the importance of clarifying distinctions among the Foundation, JIAC, and College to ensure understanding of their respective roles and shared goals.

Fillius emphasized the importance of stewardship, volunteering to write handwritten notes to donors, and encouraged other trustees to do the same. She referenced ongoing work to strengthen ties with alumni and Trustees Emeriti and noted that President Phillips continues to refine committee roles to ensure alignment with College priorities in fundraising, philanthropy, and communications.

Trustee Collins recommended that the recent Washington Monthly article featuring President Phillips be circulated to all trustees.

Trustee Bryan inquired whether Institutional Advancement would be involved in fundraising for the traditional residence hall rehabilitation project, and if so, how and when it would begin. Chair Fillius confirmed the importance of that initiative, noting that facility improvements remain a top priority for both admissions appeal and donor engagement.

Adjournment

Chair Fillius concluded the discussion by thanking all participants for their thoughtful input, reiterating that trustee engagement, philanthropy, and stewardship are central to the College's advancement goals and long-term success.

The meeting adjourned at 12:30 p.m.

SMCM Foundation Operations Orientation Briefing



Dan Schiffman '91
President, SMCM Foundation

Stephen L. McDaniel, CFRE
Interim Vice President of Institutional Advancement
& SMCM Foundation Executive Director



Mission & Purpose

The St. Mary's College of Maryland Foundation exists to advance the College's mission as the National Public Honors College by securing, stewarding, and managing private philanthropic resources. **The Foundation serves as the College's charitable gateway, ensuring that donor gifts are received, invested, and deployed in accordance with donor intent and the highest fiduciary standards.**

- **Importantly, the SMCM Foundation holds the highest nonprofit philanthropic transparency certification—the Candid Platinum Seal—demonstrating our commitment to financial stewardship, accountability, and public trust.**



Mission & Purpose

Core Mission Elements

- Support student access, affordability, and academic excellence.
- Provide responsible stewardship of endowed and current-use funds.
- Strengthen donor confidence through rigorous transparency and reporting.
- Enable the College to pursue strategic initiatives not fully funded by State appropriations.

Strategic Role

The Foundation is an essential partner to the Institutional Advancement division, expanding the College's capacity for:

- Endowment growth
- Major and planned gifts
- Annual giving
- Corporate and foundation philanthropy

Governance & Management



Board Governance

- The Foundation is governed by its own Board of Directors, operating under Maryland nonprofit law and the Foundation's bylaws.
- Directors include alumni, corporate leaders, and community members with expertise in philanthropy, finance, governance, and investment oversight.
- The Foundation operates with full transparency, supported by annual independent audits and public reporting aligned with Candid Platinum standards.



Governance & Management



Key Committees

- **Executive Committee** – Oversees strategic direction and executive decisions.
- **Joint Investment Advisory Committee (JIAC)**– Provides fiduciary oversight, selects investment advisors, reviews portfolio performance, and manages risk tolerance.
- **Governance Committee** – Oversees board recruitment, onboarding, assessment, and compliance.
- **Development Committee** – Supports fundraising strategy and donor stewardship.



Governance & Management



Management & Staff Leadership

- The Interim Vice President for Institutional Advancement & Executive Director of the Foundation serves as the senior administrative officer supporting Foundation operations.
- Foundation operations are supported by Finance, Gift Accounting, Advancement Services, and Donor Relations teams.
- The Foundation invites a close coordination with the College's CFO, President's Office.

Restricted & Unrestricted Funds



Restricted Funds

- Legally binding through donor gift agreements.
- Support targeted priorities such as scholarships, professorships, academic programs, student emergency support, visiting scholars, and capital improvements.
- Include **permanently restricted (true endowment)** and **temporary restricted (current-use)** funds.

Restricted & Unrestricted Funds



Unrestricted Funds

- Provide flexible support that can be directed to the College's most immediate and strategic needs.
- Include **Board-designated quasi-endowments**, which function similarly to endowments but may be accessed with Board approval.
- Support priorities such as:
 - Presidential initiatives
 - Emergency needs
 - Strategic investments
 - Advancement capacity-building

Spending & Investment Policies



Spending Policy Overview

- Endowed funds follow a consistent annual distribution formula designed to ensure long-term stability and intergenerational equity.
- Typical spending rate: **4–5% of the trailing 12-quarter average market value**, reviewed annually by the Joint Investment Advisory Committee (JIAC).



Spending & Investment Policies

Investment Policy Principles

- Preserve and grow the long-term purchasing power of endowed assets.
- Diversify across asset classes to moderate risk and enhance returns.
- Align investments with fiduciary responsibilities and donor expectations.
- Maintain sufficient liquidity to meet payout requirements and operational needs.

Oversight and Compliance

- The Investment Committee meets quarterly to evaluate performance and ensure compliance with the Investment Policy Statement (IPS).
- The Foundation employs a professional investment advisor subject to regular review and performance evaluation.



Risk Tolerance



Investment Risk Framework

- The Foundation maintains a **moderate long-term risk tolerance**, appropriate for an institution needing both stability and sustainable growth.
- Risk considerations include:
 - Predictability of scholarship and program funding
 - Market volatility
 - Liquidity needs
 - Compliance with donor intent

Risk Tolerance



Risk Mitigation Factors

- Broad portfolio diversification
- Annual review of risk posture by the Investment Committee
- Ongoing monitoring of market conditions and rebalancing
- Transparent reporting to the Foundation Board and BOT committees



Balances & Fund Categories



The Foundation manages a diversified portfolio of philanthropic assets across multiple categories:

- Endowment Funds
- Current-Use Restricted Funds
- Unrestricted Funds



Balances & Fund Categories

Endowment Funds

- **Permanently Restricted Endowments** (true endowments)
- **Board-Designated Quasi-Endowments**
- Support scholarships, faculty development, student experiences, and core academic programs.

Current-Use Restricted Funds

- Annual Fund designations
- Academic, athletic, and student-support funds
- Specialized programmatic grants and pass-through funds



Balances & Fund Categories

Unrestricted Funds

- Provide essential flexibility for college leadership and Foundation operations.
- Support strategic initiatives, donor engagement, and emerging priorities.

Future Considerations

- Property held for investment or future campus use
- Assets supporting staff housing or capital development partnerships (e.g., MEDCO collaborations)



Balances & Fund Categories

Financial Reporting

- Annual audited financial statements
- Quarterly portfolio performance reports
- Donor fund reporting for endowed and current-use funds

Foundation Assets Report



As of November 30, 2025:

- Total Endowment value - \$45m

Breakout:

- Unrestricted \$449k
- Restricted \$44.4m
- Quasi-endowed \$202k
- Available to spend (including amounts encumbered for FY2026) \$10.2m

Giving Tuesday 2025



- **Total Raised \$466,023** an institutional record, and increase of 12% from 2024
- **Unique donors 3,677** exceeding the goal of 3,500
- **Alumni:** 3.71% increase in alumni donors to 1,017, and a 4% increase in giving to \$173,394
- **Board of Trustees:** 85% increase in giving to \$62,450
- **Foundation Board:** 26% increase in giving to \$39,750
- **Friends of the College:** 8.5% increase in giving to \$100,826
- **133 designations supported**

Conclusion



This briefing provides Trustees with a high-level overview of how the SMCM Foundation supports the College through mission-driven philanthropy, strong governance, prudent financial management, and industry-leading transparency.

Giving Tuesday	FY23	FY24	FY25	FY26	% Change
Total Unique Donors	2,892	3,800	3,915	3,677	-6.5%
Total Dollars Raised	\$309,877	\$391,086	\$416,075	\$466,023	+12%

- Set an institutional record in dollars raised with \$466,023, a 12% increase from FY25.
- Exceeded the goal of 3,500 donors with 3,677, but were down from FY25 record year of 3,915 donors. It's unclear at this point as to why, but anecdotal evidence suggests that there were some external factors such as the government furlough and campaign donor fatigue.
- A review of the data shows increases across the following groups:
 - Alumni: 1,017 donors (+3.71%) and \$173,394 in giving (+4%)
 - Parents of Alumni: 121 donors (+25%) and \$25,218 in giving (+119%)
 - Board of Trustees: \$62,450 in giving (+85%) - donor numbers remain similar
 - Foundation Board: \$39,750 in giving (+26%) - donor numbers remain similar
 - Friends of the College: 1,706 donors (-13%) but \$100,826 in giving (+8.5%)
- Although student giving was slightly down compared to last year's record, we still received \$5,027 from 256 students, numbers most colleges our size would likely envy.
- There were also slight decreases in the number of donors and dollars donated by current parents and faculty/staff.
- Summary: This year, the planning committee didn't implement any large changes, allowing us to build on areas we already excel - particularly in the recruitment and support of the Champions. Collaborating with Kelly Neiles and the PSAs proved valuable in identifying Champions for academic departments, including some influential faculty members. We successfully continued key components, such as the \$10 bonus for alumni and student donors (now in its third year) and the Allan Challenge (in its fourth year), both of which have been instrumental in engaging student and alumni donors.

Institutional Advancement



Case for Support
The Board of Trustees “Ark & Dove Awards Gala”
An Annual Signature Event
to
Advance the Mission of Maryland’s Public Honors College

Signature Special Event Concept - Trustee Susan Bass

Charge



Purpose and Vision

- The *Ark & Dove Awards Gala* is envisioned as the **premier philanthropic and recognition event** of St. Mary's College of Maryland (SMCM). Established under the leadership of the Board of Trustees, this annual celebration honors individuals and organizations whose values reflect leadership, service, and commitment to education.
- This event represents a **bold and strategic initiative** to strengthen the College's philanthropic foundation by generating **unrestricted funds** that provide the flexibility necessary for innovation, student success, and institutional excellence.

Why Unrestricted Funding Matters



- Unrestricted gifts are the **lifeblood of the College's annual priorities**. They provide immediate resources that allow leadership to respond to emerging needs and opportunities, such as:
 - **Scholarships and student success initiatives** ensuring affordability and access for all students.
 - **Faculty support and academic innovation** across liberal arts disciplines.
 - **Campus life enhancements** that improve student retention and engagement.
 - **Strategic initiatives and special projects** aligned with the President's vision and the Board's goals.
- By focusing on unrestricted giving, the Ark & Dove Awards Gala strengthens the College's capacity to act boldly, innovate quickly, and sustain its reputation as the **National Public Honors College**.
- **Passioned directed contributions are always welcomed.**

Event Overview



- **Event Name:** *St. Mary's College of Maryland Board of Trustees Ark & Dove Awards Gala*
- **Purpose:** To celebrate excellence, honor leadership, and raise unrestricted philanthropic support for the College.
- **Annual Fundraising Goal:** \$300,000–\$1,000,000 (net)
- **Expense Ratio:** 25% or less
- **Audience:** Trustees, alumni, corporate and foundation partners, major donors, community leaders, and friends of the College.
- **Leadership:** Co-chaired by the SMCM President, Board of Trustees President, and SMCM Foundation President.

Award Recognition



- Each year, the *Ark & Dove Awards* Gala will recognize individuals and organizations whose achievements exemplify:
 - **Leadership and Service** to higher education, community, or the public good.
 - **Philanthropy and Partnership** advancing the College's mission and values.
 - **Innovation and Impact** in fostering social responsibility, and academic excellence.
- Honorees will be selected by a Board-appointed committee and celebrated during the dinner in a program designed to inspire giving and engagement.

Sponsorship and Support Opportunities

Level	Gift Amount	Recognition and Benefits
Presenting Sponsor	\$50,000	Premier recognition; logo on all materials; table for 12; opportunity to present an award; private reception with College leadership.
Platinum Sponsor	\$25,000	Recognition in program; table for 10; full-page program ad; featured on event signage and website.
Gold Sponsor	\$10,000	Recognition in program; table for 10; half-page ad; mention during event remarks.
Silver Sponsor	\$5,000	Recognition in program and signage; table for 10.
Supporting Sponsor	\$2,500	Four seats; name listed in program.
Individual Ticket	\$500	One seat at the dinner and recognition in program.

Program Framework



Time	Segment
6:00 PM	VIP Reception, Photo Line & Silent Auction
6:45 PM	Dinner Seating with Student Ensemble
7:00 PM	Welcome by President & Board Chair
7:20 PM	Dinner Service
8:00 PM	Ark and Dove Awards Presentation
8:40 PM	Student Story & Fund-a-Need Appeal
9:10 PM	Entertainment Segment & Silent Auction Announcements
9:45 PM	Closing Toast & Acknowledgments
10:00 PM	Networking Dessert Reception

Implementation Timeline



Phase	Milestones
Month 1-2	Establish committees, confirm date/venue, define award categories
Month 3-4	Launch sponsorship drive, finalize honoree list
Month 5	Issue invitations, coordinate media outreach
Month 6	Rehearse program, finalize logistics and production
Event Month	Execute dinner and fundraising components
30 Days After	Send acknowledgments, issue financial and impact reports

Revenue Structure



- **Ark & Dove Awards Dinner**
- **Goal: \$250,000 Net Proceeds**
Target Gross Revenue: \$335,000
Expense Ratio: 25%
Date: TBD
Venue: TBD (Campus or Regional Partner Venue)

Revenue Structure



- Sponsorship Levels (60% of total revenue) – Target: \$200,000
- Table & Individual Ticket Sales (20% of total revenue) – Target: \$65,000
- Silent & Live Auction (12% of total revenue) – Target: \$40,000
- Souvenir Journal / Tribute Ads (8% of total revenue) – Target: \$25,000

Expense Structure



Category	Budget	% of Total
Event Production (venue, AV, décor)	\$20,000	25%
Catering & Beverage	\$25,000	31%
Marketing & Print Materials	\$10,000	12%
Auction & Journal Management	\$8,000	10%
Entertainment & Program	\$10,000	12%
Contingency & Fees	\$7,000	10%
Total Estimated Expenses	\$80,000	100%

Impact of Giving



- All proceeds will directly benefit **St. Mary's College of Maryland's unrestricted fund**, supporting immediate institutional priorities that enhance the student experience and sustain academic excellence.
- Every contribution to the *Ark & Dove Awards Gala* contributes to a larger vision:
 - **\$500,000** raised funds 25 new need-based scholarships.
 - **\$250,000** supports innovation grants for faculty excellence.
 - **\$100,000** strengthens student engagement through mentoring and internships.
 - **\$50,000** supports arts, athletics, and leadership programs enhancing campus life.

Join Us on the Voyage



- Just as the original Ark and Dove carried hope and vision to a new land, the *Ark & Dove Awards Gala* carries the promise of a brighter future for St. Mary's College of Maryland.
Your investment helps us continue a legacy of access, excellence, and leadership that defines our College and transforms lives.

Stephen L. McDaniel, CFRE
Interim Vice President for Institutional Advancement
Executive Director, St. Mary's College of Maryland Foundation

Revised January 2026

Alumni Council President's Report

January 14, 2026

Alumni Council

The Alumni Council last met on Saturday November 1st, where we welcomed the opportunity to meet and get to know President Phillips. Additionally, we discussed the final plans for Giving Tuesday, had lunch with the SAGE students, and carried out our quarterly business.

Giving Tuesday

As others have reported, Giving Tuesday was again a strong success. Led by the Office of Alumni Relations, the campaign exceeded its goal of 3,500 donors, engaging 3,677 donors in just 32 hours and setting an institutional record of \$466,023 raised. This brings the 12-year total to more than \$3.2 million, supporting a wide range of College priorities, from the St. Mary's Fund (unrestricted) and scholarships to academic departments, athletics, and student organizations. The growth of the campaign is notable when compared to its first year in 2014, when \$17,066 was raised from 227 donors. I'd like to recognize the current and former Alumni Council members for generously donating nearly \$35,000 this year to fund the Alumni Council Champion Challenge which inspired 90 students, faculty, staff and alumni to serve as Champions and encourage their personal networks to donate.

Alumni Benefits Program

With encouragement from President Phillips, the Office of Alumni Relations has prioritized the expansion of alumni benefit programs to strengthen alumni engagement and generate modest, sustainable revenue to support alumni activities. Currently, the Office offers four annual alumni scholarships, a lifelong Google account, access to campus facilities (gym, waterfront, and library), and FreeWill, which enables alumni to create a will or trust at no cost.

Looking ahead to 2026, the Office plans to relaunch the alumni license plate program and introduce several new benefits, including an alumni travel program, a virtual learning consortium featuring industry leaders, and select partnerships with credit card and insurance providers.

Regional Alumni Events

The Office of Alumni Relations is finalizing its annual travel schedule to maintain engagement with alumni across the country and to introduce these new engagement tools. In partnership with the Alumni Council, the team plans to host events with all Maryland-based chapters and approximately half of the out-of-state chapters this year, with the remaining chapters scheduled for next year. Establishing this regular rotation will help alumni plan ahead and allow the College to better coordinate outreach and resources.

Integrated Marketing & Communications Update

- **Enrollment Marketing**
 - **3Enrollment Conversion Apply in full swing and Conversion Deposit (yield) nearing implementation as regular admission and ED II deadlines approach (Jan. 15)**
 - **Continued strong partnership with enrollment management – challenges exist but we are in a position to meet enrollment goals with continued strengthening performance of 3E**
- **Event Marketing – Dodge Performing Arts Center/Athletics**
 - **String Queens (Nov. 15) – sold out; Dan Tyminski (Feb. 14) already sold out**
 - **Initial partnership with athletics promoting Youth Game (Jan. 10) for men's basketball**
- **Team Notes**
 - **Working together on a strategic reorganization of the office to meet new institutional strategic priorities – some adjustment in staff roles, increased use of student interns and possible creation of contractual fellowships for recent graduates**
 - **Senior Graphic Designer Jo Oliver '99 received another national award from Graphic Design USA, for her “7 Wonders” blanket design (top tier champion gift for GT 2025).**
 - **Collectively the team received two gold, one silver and one merit award in the 13th Annual Educational Digital Marketing Awards. The “Honors for All” 30-second video spot and 2025 Mulberry Music Festival digital marketing campaign received gold.**