



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE
JANUARY 8, 2025**

AGENDA

I. CALL TO ORDER

II. DISCUSSION ITEMS

- A. Completing the Taking the LEAD campaign
 - 1. Progress-to-date on How High Can We Fly?
 - 2. Residence Hall Modernization initiative update
 - 3. Fundraising opportunities ahead
- B. Increasing SMCM Standing as the College of Choice
 - 1. Enrollment marketing out-of-state campaign
 - 2. Website positioning for the future
 - 3. Alumni engagement and opportunities—Alumni Association President Kate Fritz '04
- C. Enhancing SMCM as a regional cultural hub
 - 1. The Dodge PAC—opportunities and challenges

III. ACTION ITEMS—None

IV. INFORMATIONAL ITEMS

- A. Report from St. Mary's College of Maryland Vice President of Institutional Advancement
- B. Taking the LEAD Campaign Dashboard
- C. Report from St. Mary's College of Maryland Alumni Association President
- D. Minutes from September 20, 2024

V. ADJOURNMENT



BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE
REPORT SUMMARY

Date of Meeting: January 8, 2025

Date of Next Meeting: April 16, 2025

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; Adrienne Dozier

Executive Summary:

Institutional Advancement (IA) aligns with The Rising Tide and advances the College's mission by enhancing its brand and reputation, driving philanthropy, increasing alumni engagement and positioning the College as a cultural hub for the region. The Institutional Advancement Committee meeting will focus on three key IA goals. First, a brief update on the How High Can We Fly? component of the Taking the LEAD campaign and the residence hall modernization initiative will be presented. Discussion will address fundraising opportunities arising from these initiatives in preparation for FY26.

To increase the College's position as a College of Choice, the IAC will review and discuss three focal points: a) the progress of a new out-of-state marketing campaign designed to support enrollment growth; b) revamping of the SMCM website for the future; and c) the expansion of alumni engagement, including emerging opportunities. The Alumni Association President will lead the latter.

Concluding the meeting, the IAC will review and discuss how the Dodge Performing Arts Center is establishing itself as a cultural hub and its positioning for the future success.

These agenda items collectively advance the College's reputation, strengthen its brand and serve as revenue drivers.



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

INSTITUTIONAL ADVANCEMENT REPORT

Date of Meeting: January 8, 2025

Reporter: Carolyn Curry, vice president of Institutional Advancement

Institutional Advancement (IA) is comprised of the units of development, integrated marketing and communications, alumni relations, events and conferences 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 September 2024 – December 2024 as illustrated in selected progress points.

Fundraising for the Taking the LEAD Campaign

Giving to date: As of June 2024, the Taking the LEAD campaign surpassed its \$20M goal a year ahead of schedule raising \$20,281,299. The campaign transitioned to the How High Can We Fly? phase which will conclude in June 2025, with a 2024-25 goal of \$3M. To date \$1,570,313 has been raised with 90% allocated to current funds and 44% directed to the priority LEAD General Fund. Campaign updates and impact can be tracked at go.smcm.edu/taking-the-lead/

- *Giving Tuesday (Dec. 3, 2024):* The Alumni Relations team led a phenomenal record-breaking Giving Tuesday raising \$816,075, inclusive of \$416,075 in gifts plus a \$400,000 gift from Bill Seale for the William Seale Professor of Business. This exceeded the FY25 goal of \$300,000 and outperformed 2023's total of \$391,086.
- *Residence Hall modernization:* A major donor-driven fundraising initiative is underway for restroom upgrades in one traditional residence hall, aiming to catalyze updates for the three others. Don Stabile, professor of the College and major donor, is helping the development team with a matching gift challenge to raise \$1.6M this semester.
- *Planned Giving:* Efforts target 1,000 alumni for planned gifts. Foundation Director Scott Raspa '86, who made the College's largest planned gift, is collaborating with the team, resulting in two planned gifts to date.
- *Grants:* \$98,815 has been received in corporate and foundation grants during this reporting period, with several others under consideration or development.

Cultivation and stewardship: On September 27, 2024, IA's Assistant VP of Development Karen Raley oversaw a ceremony to name the Dallas P. Dean Learning Commons after the late benefactor and alumnae of the College. A video tribute is available on the College's Giving webpage. Other initiatives included:

- *California Events (Nov. 6-9, 2024):* The Alumni Relations and Development teams hosted six large and small events in California for alumni, major donor prospects, and parents drawing 60 attendees. Sites included Cardiff, Coronado, Newport Beach, Los Angeles, Monterey and Berkeley. President Jordan attended several of these events, expressing gratitude for their ongoing support and commitment to the College.
- *Florida Events (January 2025):* In mid-January, the teams will travel to Florida for similar outreach and cultivation events in Jacksonville, Orlando, Tampa, Fort Myers and Sarasota; President Jordan will meet with attendees at the last three events.

Increasing SMCM's Standing as the College of Choice

Enrollment Marketing: The integrated marketing team assists in realizing Admission funnel goals through multiple and targeted communication strategies. From the 25 print pieces produced in the reporting period, QR code scans were up 24% (1,420) over the same time last year with 25% more unique individuals. Among other strategies successfully employed during this time:

- *Key page views:* How to Apply page views increased by an impressive 53% (11,860 v. 7,771) with engagement up 68% (1 min. 25 secs.) by 21% more users.
- *Extended Visit campaign:* An additional fall visit push was launched after the November Open House. The efforts drove 20,000k website sessions thus far (up 46% over fall 2023) with Instagram accounting for 13,000 sessions. The effort will run through January 2025 not only encouraging visits, but also generating buzz for The National Public Honors College in-and out-of-state.
- *Out -of -state:* A new three-month digital out-of-state campaign, backed with retargeting on social media and digital display, generated 1,124 website visits in November from a highly targeted pool of inquiries; 800+ secondary actions were also recorded (page views, form fills, button clicks, etc.). Adding hyper-geotargeting, the campaign total exposure so far is more than 500,000 impressions reaching 100,000+ students, families and influencers (teachers, coaches, counselors, school staff). The integrated marketing team produced two :30 videos for the drive.
- *Video assets:* A new recruitment video for Admission to show at Open Houses and other related events was introduced along with video ads and parent and student testimonials, the latter being utilized on web pages and in digital pushes.

Alumni Engagement: Choosing to have alumni engage in strategic SMCM activities is the goal of the Alumni Relations team through bi-monthly communiques, e-newsletters and social media. The digital media engagements are significantly up over the same period last year: X/Twitter (51

in 2024 v. 14 in 2023), Facebook (3,338 v. 1,436) and Instagram (2,814 v. 418). Among other metrics, video views by alumni in Instagram skyrocketed 11,162 v. 45 when comparing reporting periods. The Alumni Council is currently piloting an “engagement scorecard” to actively track their involvement with the College in order to scale the effort to a broader alumni base. Updates on other ongoing activities include:

- *Hawktoberfest (Oct. 18-19, 2024)*: The annual Fall Family Weekend produced by Alumni Relations engaged 1,825 attendees, a College record surpassing last year’s total of 1,714. Of significance, 1,066 were parents/family members and 479 were students, the latter the highest number ever. The event underscores why SMCM is the best choice; surveys, testimonials and the sheer growth in attendance point to success.
- *Giving Tuesday (December 3, 2024)*: Also led by Alumni Relations, the annual online fundraiser exceeded the donor goal of 3,000 with 3,915 unique donors and more than 4,100 gifts, another College record. The goal of achieving 1,000 alumni donors was also met for the first time. The involvement of the Alumni Council, IA’s SAGE student group, former Alumni Association President Allan Wagaman and Associate Dean of Faculty Kelly Neiles and the Program Student Ambassadors all were instrumental in incentivizing, encouraging and thanking hundreds of donors.
- *Mentor-a-Seahawk*: In connection with the Center for Career and Professional Development, Alumni Relations recruited 65 alumni mentors to support two LEAD course sections in the fall with efforts underway to recruit 300 for the spring semester needs.
- *Refer-a-Seahawk*: 39 alumni to date have referred 44 prospective students, progressing toward the FY25 goal of 67 referrals.

Affinity Marketing: The integrated marketing team continues to enhance SMCM’s online presence by updating and creating fresh content across numerous webpages. Notably, the Taking the LEAD webpage experienced a 43% increase in pageviews (549) and a 33% rise in users (243) compared to the early fall 2024 reporting period. Additionally, three campaign-related news stories collectively garnered 620 pageviews. For Giving Tuesday, the team implemented a broader targeting strategy with paid social media reaching 8,281 users. Throughout the fall, efforts were also focused on migrating the smcm.edu website to a more secure hosting platform and purging outdated pages and content in partnership with departments across campus.

- *Internal newsletters*: The team produces a SMCMDaily newsletter for all faculty and staff and The Current, a recently created daily news update for students. The Current received 2,944 visits during the fall semester, a solid baseline for readership. Its Photo of the Day submissions surged to 26 students from just six in the spring. The Current just earned national recognition from the Educational Digital Marketing Association, receiving a Bronze Award for its overall creativity and content and a Silver Award for its Photo of the Day feature. The latter integrates submitted photos across social and print platforms, showcasing the College experience.

- *Holiday assets:* The team produced President Jordan's annual holiday card and video, with the latter emphasizing 2024 momentum. The holiday video achieved 663 views with a 77% average completion rate within the first two days, marking the highest engagement in all comparable reporting periods.

Advancing The National Public Honors College and LEAD

The fall Mulberry Tree magazine (reaching 14,000 readers) spotlighted the Taking the LEAD fundraising campaign and the impact of donations on LEAD initiatives. Among other tactics employed in the reporting period:

LEAD visibility: Website views for LEAD pages are up 6% (2,800) in comparison with the previous early fall 2024 reporting period with active users up 950 from 750. Student-focused YouTube shorts about their LEAD experiences garnered nearly 500 video plays, complemented by 235 views on general LEAD videos.

Rankings: The College's ranking achievements—such as its #5 ranking among U.S. News and World Report's Top Public Colleges for the second consecutive year and a leap to #4 from #14 in Princeton Review's Making a Difference—were leveraged across ads, social media and promotional materials. Visits to the College Rankings webpage grew by 25% in the reporting period (610 v. 489) compared to the earlier fall reporting.

Enhancing St. Mary's College of Maryland as a Cultural Hub and Sought-after Regional Resource

The integrated marketing team launched a Community Hub website for the new Office of Community Outreach and Engagement achieving 471 pageviews during the reporting period. Among other initiatives:

Events: In November, IA produced the annual Sacred Journey in conjunction with the Sacred Journey Steering Committee, involving nearly 300 participants, including Congressman Steny Hoyer. President Jordan received the inaugural Sacred Journey award and Commemorative lantern. Among other events in the reporting period, the team supported the Twain Laughing to the Polls led by Professor Ben Click drawing 400+ attendees. Internally, the Events team is testing several survey instruments to gather feedback from attendees. The team also manages the newly overhauled venue scheduling system, facilitating more than 6,000 monthly space reservations across campus and training employees in its use.

Dodge Performing Arts Center: While fall 2024 overall attendance (12,075) is lower than in 2023 (15,280) in the same reporting period, average attendance per event rose to 242 from 191. December events in particular drew nearly 4,000 attendees over nine performances in an 11-day period.

- *Strategic academic shift:* A strategic shift was made this fall to streamline usage of the primary performance venues (the Recital Hall and Concert Hall) to increase availability for the Music Department. By reassigning alternative venue space to other non-

performing campus events that did not require the Dodge PAC, the venue prioritization has provided the department enhanced student rehearsal and classroom practicum space.

- *Community rentals:* The Dodge PAC secured revenue-generating partnerships with groups like Historic St. Mary's City/Newtowne Players, Ballet Caliente and the COSMIC Symphony. These collaborations benefit students by fostering community connections and professional opportunities as well as expanding the venue's regional footprint.
- *Ticketing platform:* Conversion to a new ticketing platform launched this fall will allow for more convenience, segmented tracking, ticket options and ticket packaging. For the first time, the Dodge PAC ventured into ticket packaging which enabled customers to buy tickets for a suite of concerts at a reduced price.
- *Art installation:* A commissioned piece by Aurora Robson, made possible by the state and the Maryland State Arts Council, will be installed in January and provide added marketing opportunities.
- *Integrated marketing:* A distinctive logo complementing the College logo was created for the Dodge PAC that is now featured on its website and promotional materials. The team also expanded the Dodge PAC website encompassing multiple pages with a more navigable layout. The result: a 139% increase in pageviews (2,765 v. 1,155) compared to the earlier fall 2024 reporting period. Organic Google search and ads on Meta were the primary contributors to the bump, among other mediums. For the seven ticketed events during the reporting period, the primary generators of tickets were the Dodge PAC website and social media, among other mediums including postcards and flyers.

Taking the LEAD Campaign Dashboard

How HIGH Can We Fly?

December 12, 2024

LEAD Campaign Overview

	CUMULATIVE METRICS
Campaign Goal	\$ 20,000,000
Total Raised to Date (Total Value of Gifts/Pledges)	\$ 21,851,312
Balance of Outstanding Pledges and Unrealized Planned Gifts	\$ 7,332,224
Percent Raised toward \$20m Goal	109.26%

	FY21-FY24 Total	FY2025 YTD (\$3M Goal)	Total Campaign
Annual Total Raised	\$ 20,281,299	\$ 1,570,013	\$ 21,851,312
Annual Total Number of Major Gift Donors (\$10,000 and up)	\$ 162	\$ 15	\$ 177
Total Value of Major Gifts (\$10,000+)	\$ 17,780,448	\$ 1,200,400	\$ 18,980,848
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	2	7
Value of New Planned Gifts	\$ 4,823,735	\$ 55,000	\$ 4,878,735

LEAD Campaign Priorities

Total Dollars Raised	FY21-FY24 Total	FY2025 YTD	Total Campaign
LEAD General Fund	\$ 3,508,497	\$ 621,528	\$ 4,130,025
New Academic Programs—Business Administration	\$ 411,005	\$ 402,665	\$ 813,670
New Academic Programs—Marine Science	\$ 320,368	\$ 56,628	\$ 376,997
New Academic Programs—Neuroscience	\$ 52,190	\$ 110	\$ 52,300
New Academic Programs—Performing Arts	\$ 1,568,989	\$ 1,600	\$ 1,570,589
Enhanced Curricular Support	\$ 1,302,549	\$ 105,370	\$ 1,407,919
Co-Curricular Support	\$ 459,376	\$ -	\$ 459,376
Honors College Promise	\$ 303,004	\$ 5,958	\$ 308,962
IDEAA	\$ 6,250	\$ 14	\$ 6,264
Scholarship Support	\$ 7,546,356	\$ 121,173	\$ 7,667,529
St. Mary's Fund	\$ 824,096	\$ 27,957	\$ 852,053
Unrestricted Endowment	\$ 2,502,200	\$ 2,000	\$ 2,504,200
Other	\$ 1,476,420	\$ 225,010	\$ 1,701,430
TOTAL	\$ 20,281,299	\$ 1,570,013	\$ 21,851,312



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

SMCM ALUMNI ASSOCIATION REPORT

Date of Meeting: January 8, 2025

Reporter: Kate Fritz '04, SMCM Alumni Association president

The Alumni Council had a busy fall focusing on two priorities: Giving Tuesday and re-building our Regional Chapters.

Giving Tuesday 2024 - The Alumni Council and Alumni Council Legacies (former members) set an ambitious goal to raise \$30,000 for this year's Alumni Council Challenge. Exceeding all expectations, we collectively raised over \$43,000 - a record-breaking amount. 100% of the Council contributed on Giving Tuesday and this funding inspired SMCM Champions to rally around SMCM causes of personal significance (academic departments, student clubs, athletic teams, scholarships, etc.). The top 10 performing Champions, determined by donor votes through the donation form, were awarded amounts ranging from \$500 to \$5,000 for their chosen SMCM cause. Additionally, every Champion cause received \$10 for each alum and student who voted for them.

The impact of this Challenge, combined with the seamless coordination of the event by the Institutional Advancement team, was extraordinary. This year, a record 3,900+ donors contributed a total of \$416,075 in addition to the surprise \$400,000 gift from Bill Seale which brings the total to \$816,075. The momentum was further fueled by six Alumni Council members who took time off work on December 3 to be on campus, assisting Institutional Advancement in engaging students and building excitement at the Campus Center. This unique Challenge continues to set SMCM apart from other colleges and nonprofits on Giving Tuesday.

Regional Chapters - In addition to Giving Tuesday, the Alumni Council has prioritized building and rebuilding regional chapters to strengthen alumni connections across the country. In November, President Jordan and the Institutional Advancement team embarked on a six-stop tour from San Diego to Berkeley, California, connecting with alumni and supporters throughout the state. This effort resulted in a petition for charter with more than double the required signatures to establish a Southern California Alumni Chapter. The Alumni Council will vote on this new chapter at the Winter Council meeting in February, and we are optimistic about its approval.

These accomplishments underscore the energy, generosity, and dedication of the SMCM alumni community. With even more exciting opportunities ahead, we look forward to seeing what we can achieve together in partnership with the Institutional Advancement team in the coming year.



**BOARD OF TRUSTEES
INSTITUTIONAL ADVANCEMENT COMMITTEE**

**OPEN SESSION
MINUTES**

Date of Meeting: September 20, 2024

Status of Minutes: Draft

Institutional Advancement Committee Members Present: Committee Chair Gail Harmon, Trustee Chair John Bell '95, Kate Fritz '04, Elizabeth Graves '95, President Tuajuanda Jordan, Melanie Rosalez '92, Andrew Cognard-Black (faculty liaison), Gretchen Phillips (staff liaison)

Members Absent: Carlos Alcazar, Kristen Greenaway, Judith Fillius '79

Staff Member: Vice President for Institutional Advancement Carolyn Curry

Others Present: Betsy Barreto, Mary Broadwater, Adrienne Dozier, Katie Gantz, David Hautanen, Jerri Howland, Amir Mohammadi, Karen Raley, Chuck Steenburgh, David Taylor, Jackie Wright

Chair Gail Harmon opened the meeting at 10:03 a.m., noting new members Judy Fillius (vice chair), Carlos Alcazar and Melanie Rosalez. The meeting focused on two of five areas of Institutional Advancement (IA): enrollment marketing and fundraising. Vice President of Institutional Advancement Carolyn Curry and Assistant Vice President of Integrated Marketing and Communications Chuck Steenburgh outlined strategies to support enrollment, with input from Alumni Association President Kate Fritz on alumni collaboration. Foundation President Dan Schiffman discussed the Foundation Board's role impact on the LEAD campaign and VP Curry introduced a new fundraising initiative.

Enrollment Marketing

VP Curry emphasized the partnership between Enrollment Management and IA, with Enrollment Management setting recruitment goals and the integrated marketing team supporting brand development and the College's reputation as well as targeting prospective students and families through a multitude of marketing channels. AVP Chuck Steenburgh acknowledged that most in attendance were familiar with the team's marketing support of College initiatives, successes, events and fundraising. However, they may not be aware of the daily efforts put forth for recruitment as they are not the target demographic for receiving those continuous communiques and thus less likely to witness firsthand the impact.

AVP Steenburgh explained the concept of the marketing funnel stages (*see the Advancing Enrollment Marketing handout in the IAC packets*) and how different channels are assessed for effectiveness, highlighting the team's extensive work in advertising, design, print, video and

digital and social media. He noted that the team has received numerous third-party validations through national awards. Part of the success comes from the data supplied by external partners and web analytics.

Trustees asked about the impact of print, the website's importance, retargeting, national media efforts and search engine optimization. Special thanks went to Trustee Carlos Alcazar for providing expertise on the SMCM website and effective strategies. A record turnout for the spring Open House was cited as an example of how specific marketing techniques helped contribute to the success.

Alumni Association President Kate Fritz outlined alumni involvement in recruitment and in building the brand, including the Refer-a-Seahawk program, serving as ambassadors, contributing testimonials to digital marketing, serving as influencers and visibly pushing the brand in Bay-to-Bay Service Days and Giving Tuesday.

Taking the LEAD Campaign

Foundation President Dan Schiffman provided an overview of the spend rate, how the Foundation sets it and the impact to the more than 130 endowed funds the Foundation manages, particularly private scholarships. The rate is calculated based on the twelve-quarter rolling average of the endowment's market value and is set annually in November to ensure that scholarships are available to offer in the recruitment of students for the incoming class. He also highlighted that the Foundation manages more than 300 endowed and current funds combined, and illustrated how much the College had spent from these funds for the last three years.

VP Curry provided an update on the ongoing "How High Can We Fly?" phase of the LEAD campaign, which is set to conclude in June 2025. The LEAD campaign has thus far raised \$21M with an FY25 goal of \$3M of which \$781,000 has been raised. A *Taking the LEAD Campaign Dashboard* was provided in the materials. She emphasized the importance of expanding the donor base and shared goals for alumni, faculty/staff, student and parent cohorts.

A new fundraising initiative to modernize restrooms in one of the College's traditional residence halls was unveiled as part of the "How High Can We Fly?" efforts with a fundraising goal of \$1.6M. The idea came from long-time faculty member and leadership donor Don Stabile, who felt that such a project could greatly enhance recruitment and retention efforts, as well as serve as a catalyst for future fundraising for the other three halls. Trustee involvement was encouraged to help secure major donors for the project.

Chair Harmon then advised that she would make a motion for the committee to move into closed session to review and discuss prospective donors who may support the traditional residence hall bathroom modernization project.

Adjournment for Closed Session

Chair Harmon made a motion to close the meeting in compliance 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 is not subject to disclosure under the Maryland Public Information Act. Trustee Elizabeth Graves seconded the motion.

Names of members voting aye: Trustee Chair John Bell '95, Kate Fritz '04, Melanie Rosalez '92, Elizabeth Graves '95, SMCM President Tuajuanda Jordan

Members Opposed: None

Abstaining: None

The meeting adjourned for closed session at 10:52 a.m.

DRAFT