



FINAL REPORT



SMU IGNITED: BOLDLY SHAPING TOMORROW

FINAL REPORT

July, 2025

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I. Executive Summary

The completion of *SMU Ignited: Boldly Shaping Tomorrow* marked the third successful consecutive comprehensive campaign conducted by the University, generating a combined \$3B+ in philanthropic support. This is in addition to SMU's active participation in two campaigns which established and provided ongoing financial support for facilities and programs of the George W. Bush Presidential Center.

Immediately following the December 2015 conclusion of SMU Unbridled: The Second Century Campaign, the University began tallying gifts toward its anticipated third campaign, and organizational planning for the new campaign began in earnest in the spring of 2016. Led by the Trustee Special Committee on Development (composed of previous campaign co-chairs as well as officers of the Board), President R. Gerald Turner and Senior Vice President for Development and External Affairs (DEA) Brad Cheves, a deliberate planning process was undertaken addressing the following topics, among others:

- Identifying elements of the University's Strategic Plan which would be attractive to philanthropists as well as the broad Mustang nation;
- Securing the financial and staff resources required by DEA to conduct another centrally funded and executed campaign of greater size than previous campaigns;
- Applying the latest technologies available in the areas of marketing, communications, gift solicitations, analytics, prospect research and management, and other areas in support of a robust marketing and solicitation effort;
- Developing goals related to donor counts, gift sizes, gift purposes, and overall financial results, leveraging the new campaign to create sustainable and long-term growth in philanthropic support;
- Creating new ways to celebrate donors and campaign milestones as an encouragement of continued support, as well as providing meaningful stewardship and reporting; and
- Identifying the most likely donor prospects and most dedicated volunteers, as well as the recruitment of an experienced and capable staff.

Funding Priorities

A key decision by the campaign leadership was to focus objectives on the highest priorities affecting SMU's future (endowment, academic and athletics programs, student support, technology and facilities, etc.) and not on ancillary goals such as alumni giving participation and regional engagement, having made strides in those areas in the previous two campaigns with strong elements continuing. Three global areas for support were identified which would encompass funding priorities across the institution: Student Support, Faculty and Academic Resources, and Campus and Community (including Athletics).

Volunteer Organization

The Campaign was led by the aforementioned Special Committee on Development, renamed the Campaign Leadership Council (CLC). Volunteer Campaign Steering Committees (CSCs) were formed in the areas of highest solicitation opportunity: schools with large and active bases of alumni and donors, and athletics. The CLC met quarterly through the campaign planning and public phases; the Campaign Steering Committees met as necessary with a minimum of one meeting per semester through the Campaign's public phase. Twice a year the Campaign Executive Committee (composed of the CLC and chairs of the CSCs) met to review campaign progress. Finally, pre-existing non-campaign committees, such as Executive Boards, friends programs, membership groups and others were employed episodically in support of campaign funding opportunities in their specific areas.

DEA Staff Structure

In Fall 2015, the consulting firm Marts & Lundy conducted an organizational audit of DEA at the request of President Turner and SVP DEA Cheves, in preparation for a third comprehensive campaign. Based on this report, DEA continued the strategy of dispersing campaign execution responsibilities across pre-existing functional units, rather than creating a separate campaign staff unit. Fundraising responsibilities were distributed into three overlapping and coordinated components:

- Gift purpose (supported by staff embedded in schools and Athletics)
- Gift size (supported by staff focused on newly identified gift levels: Principal Gifts [\$1M+], Major Gifts [\$100K+]; and Leadership Gifts [\$25K+])
- Targeted Constituency (alumni, parents, corporations, foundations, planned giving prospects, etc.)

DEA functional units focused on fundraising were expanded from two (Annual Giving and Alumni Relations, and Development) to three (Annual Giving and Alumni Relations, Principal and Major Gifts, and School and Project Development) to allow for broader reach, more donor-centric interaction, and the recruitment, training and management of a larger fundraising team.

In addition, the Office of Public Affairs was renamed Marketing and Communications and reorganized around functional disciplines to allow for greater specialization and improved consistency, accountability and service. The new structure flattened the organization and established dedicated roles for critical functions such as social media and project management. The division is now comprised of Digital Marketing, Planning and Development Marketing, Media Relations, Strategic Communications, and Creative Marketing. This restructuring was designed to better support SMU's strategic goals, elevate storytelling and position the University as a thought leader.

With the objective of building an organization capable of conducting a \$1B+ comprehensive campaign while increasing the numbers of donors at higher levels, the Board authorized DEA to add up to 25 new positions, imbedded across DEA functional units where it was projected additional campaign support would be required. At any one time, up to 23 of the positions were filled. At the time of this writing, these positions are imbedded across the entire division in every function unit, with the anticipation they will remain post-campaign.

A DEA organizational chart reflecting the structure at the Campaign's conclusion is provided in Appendix D.

Brief comments regarding each functional unit follow.

Annual Giving and Alumni Relations

As an important component to building a pipeline of alumni and parent support, as well as a significant element of campaign marketing and donor recognition, Annual Giving and Alumni Relations (AGAR) played a significant role during the Campaign. With numerous regional events and outreach programs, in close collaboration with schools, units, and athletics, and through the employment of social media as well as traditional communication methods, the Campaign was able to attract, largely due to the programs of AGAR, over 67,500 donors to the Campaign. This number is compared to 41,344 donors in the first campaign and 65,235 donors in the second campaign, both of which spanned longer timeframes.

Development Services

Development Services played a critical role in the success of the Campaign through prospect identification and management, prospect research, gift and record keeping, and analytical support for top decision makers. While a remarkable level of support and strategy was provided by Development Services, it quickly became apparent SMU was employing an aged Constituent Record Management (CRM) tool. The importance of upgrading SMU's CRM is paramount, and recent significant investments have been made for this purpose and the transition to a new CRM platform is underway.

Marketing and Communications

During the planning phase for the Campaign, DEA conducted substantial research to understand the priorities and philanthropic goals of donors, particularly current and prospective major donors – and then developed the *SMU Ignited: Boldly Shaping Tomorrow* name, visual vocabulary and messages to inspire deeper support for the University. (In conjunction with the launch of the campaign, SMU also rolled out a modernized logo, visual vocabulary and website that enhanced the coordination of academics and Athletics efforts to raise the University's visibility.) Throughout the *SMU Ignited* campaign, SMU emphasized the long-term impact donors make – on the lives of students, by enhancing the important research and teaching of faculty, and on the communities Mustangs serve.

Because the media landscape had changed substantially since the *SMU Unbridled* campaign, the University's approach to marketing the *SMU Ignited* campaign evolved to find the best ways to communicate the Campaign's messages and impact to current and prospective donors. Extensive use of digital and other advertising – particularly through social media – enabled the University to keep SMU visible to supporters and to show the ways donors' investments make a significant difference on the Hilltop and beyond. Over nearly four years, these efforts generated more than 186.3 million impressions with alumni and donor audiences.

Principal and Major Gifts

The impact of DEA's focus on Principal and Major Gifts can be seen in the table Donor Count by Commitment Size (page 24), which showed significant growth in the number of donors

whose commitments reached major gift and principal gift levels, including several historic gifts at eight and nine figures. This was the direct result of the strategy to build and expand the Major Gifts and Principal Gifts teams, led by a new Vice President of Principal and Major Gifts.

Two significant elements within Principal and Major Gifts were Corporate and Foundation Giving and Planned Giving.

- Corporate and Foundation Giving
 - During the Campaign, cultivation and solicitation of foundations and corporations was pursued by fundraisers and leadership across campus, working in coordination with a centrally based staff. The centralized Corporate and Foundation Relations office was part of the Principal and Major Gifts functional unit within DEA.
 - Funding from foundations, corporations and all other organizations during the *SMU Ignited* campaign reached \$212,283,685 (not including “personal and family foundation” giving) a slight increase from the \$210,312,159, from the Unbridled Campaign and increase of 55% from the total in A Time to Lead campaign (\$137,245,410) – both of which spanned longer timeframes. Of the *SMU Ignited* total, foundation commitments were 66% of the dollar value, reflecting continued engagement from many of the foundations and institutional donors who have collaborated with and supported the University over the years.
 - Of the many gifts secured from organizations, several million dollar+ commitments were received from significant local and regional foundations, as can be seen in Appendix F.
 - Corporate philanthropy was aided through strong alumni and community member connections. Corporate relationships with AT&T, Toyota North America and Texas Instruments stood out for their philanthropic and research support, mentorships, internships, executive engagement, and other connections with the University. National firms and companies such as Amazon, Comerica, EY, Exxon Mobil, Goldman Sachs, Hunt Consolidated, Jones Day, and PwC saw significant involvement through corporate philanthropy, alumni participation and, in many cases, service on SMU’s school executive boards. Stand out collaborations include the West Dallas STEM School collaboration with Toyota North America and Dallas Independent School District, the Data Science Scholars Program in partnership with AT&T, and the Dedman School of Law’s Corporate Counsel Externship Program.
- Planned Giving
 - A significant focus was placed on growing the Planned Giving program, which ultimately accounted for \$169M of the *SMU Ignited* campaign total. As a comparison, the first campaign received \$83.1M in Planned Gifts, and the second campaign had \$139.2M. SMU has the aspiration of Planned Gifts representing 20% or more of future campaign financial totals.

Program Services and Donor Relations

Prior to the launch of the Campaign, Donor Relations was transferred from the Development Services functional unit to create a new Program Services and Donor Relations function unit, to

better align and coordinate donor recognition with special events and endowment reporting. Significant enhancements were made to the way donors were recognized and stewarded, including ceremonial recognition certificates, more personalized special events, special stewardship written reports, continuation of the prestigious Mustang Award program, and more personalized service overall. SMU continued its tradition of highly impactful donor recognition through events of all sizes, each tailored to the appropriate message and impact of the donors being recognized. This ranged from small private gatherings to expansive arena-sized programs. It is important to note many ongoing programs not directly related to the Campaign were critical to the Campaign's visibility, including the Tate Lecture Series among others. Finally, it is notable that during the Campaign, the Program Services and Donor Relations team was given the additional assignment of executing SMU's central academic ceremonies.

School and Project Development

As noted above, the impact of DEA's strategy to support school and athletics fundraising with centrally managed but de-centrally housed fundraising staff was highly impactful, with record-setting results in each school and unit. More detailed impact reports are provided in the following Campaign Steering Committees Summary Outcomes (pages 51-73).

Timeline

The campaign planning phase began January 1, 2016; the public phase launched September 17, 2021; and the Campaign concluded May 31, 2025. A list of campaign milestones follows.

Timeline of Campaign Milestones

The following timeline provides examples of significant steps in campaign planning and execution, volunteer meetings, donor recognition events, and selected donor commitments of \$1,000,000+ in size. For a complete list of major and principal gift donors to the Campaign please refer to Appendix F.

| Date | Event |
|--------------------|--|
| January 1, 2016 | Campaign Planning Phase begins; financial counting begins |
| Winter, 2016 | Commitment of \$10,000,000 from David B. Miller '72, '73 and Carolyn L. Miller and David B. Miller Family Foundation to Moody Coliseum/Men's Basketball Program and Indoor Performance Center (Armstrong Fieldhouse), naming the Miller Boulevard Ballroom |
| Winter, 2016 | Commitment of \$1,250,000 from WJO Foundation (Fay C. O'Neil '55 and William J. O'Neil '55, Shala and Scott O'Neil, Brittany O'Neil) to create the William J. O'Neil Center for Global Markets and Freedom |
| Winter, 2016 | Commitment of \$1,000,000 from Charles C. Butt to the Annette Caldwell Simmons School of Education and Human Development |
| March 24, 2016 | First annual Giving Day |
| September 14, 2016 | Public announcement of a commitment of \$10,000,000 from Diane M. Brierley and Harold M. Brierley to establish the Brierley Institute in Customer Engagement in Cox |
| September 16, 2016 | Dr. Bob Smith Health Center Groundbreaking Ceremony |
| Fall, 2016 | \$1,000,000 commitment from Kathryn H. Arata '87, '91 and Stephen L. Arata '88 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Fall, 2016 | Anonymous commitment of \$1,000,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Fall, 2016 | \$2,000,000 commitment from A. Taylor Nance to university scholarships |
| December 13, 2016 | Celebration of Deason Family Criminal Justice Reform Center funded by Deason Family commitment of \$3,500,000 and Koch Foundation commitment of \$3,500,000 |
| December 15, 2016 | Public event celebrating the establishment of the AT&T Center for Virtualization, made possible by a \$2,500,000 commitment from AT&T |
| December, 2016 | Carl Sewell '66 and Peggy Higgins Sewell '72 give \$1,000,000 for Sewell BBA Scholars in Cox and continue this gift each year of the Campaign. |
| Winter, 2017 | \$10,000,000 commitment received from Steve Lockton in support of Dedman College, Athletics, and General University scholarships |

| Date | Event |
|------------------|---|
| Winter, 2017 | Richard Collins '69 and the Calvert K. Collins Family Foundation commit \$1,000,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Winter, 2017 | Pledge of \$1,000,000 from Richard Ware and William Ware to the Indoor Performance Center (Armstrong Fieldhouse) |
| Winter, 2017 | Announcement of naming of Gene and Jerry Jones Grand Atrium, Meadows Arts Center |
| Winter, 2017 | The Randall S. Fojtasek '85, '90 and Olamaie G. Fojtasek Family Foundation commits a total of \$1,000,000 to Cox and Simmons |
| January 10, 2017 | Event celebrating the establishment of the William F. May Endowed Directorship in SMU's Maguire Center for Ethics and Public Responsibility |
| March 7, 2017 | Annual Giving Day |
| Spring, 2017 | Commitment of \$2,000,000 from Jack Sanders establishing the Jack Frost Sanders Endowed Film Scholarship at Meadows |
| Spring, 2017 | Liz Martin Armstrong '82 and Bill Armstrong '82 commit \$1,500,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Spring, 2017 | Jennifer Gelety Flanagan '82 and Martin L. Flanagan '82 commit a total of \$1,100,000 to the Indoor Performance Center (Armstrong Fieldhouse) and the Niemi BBA Scholarship at Cox |
| Spring, 2017 | A total of \$2,319,397 is committed by over 90 donors in support of the Albert W. Niemi Center for American Capitalism, Maria and Albert Niemi Centennial BBA Scholars, and other funds in the Cox School |
| March 28, 2017 | Dedication of the Olamaie Curtiss Graney Design Lab in Harold Simmons Hall, Simmons School |
| April 6, 2017 | Opening of the SMU Mission Foods Texas-Mexico Center |
| April 7, 2017 | Major Donor Luncheon and Update, launching Pony Power: Strengthening the Stampede |
| April 7, 2017 | Parent Major Donor reception at Turner home |
| Summer, 2017 | Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 commit \$4,230,000 to Hunt Leadership Scholars Program and continue to support the program throughout the Campaign with significant gifts |
| Summer, 2017 | \$1,800,000 is received from the Estate of Leonard Allen Shankle in support of General University |
| Summer, 2017 | Sheila and Jody Grant commit \$1,500,000 to the Robson & Lindley Aquatics Center |
| Summer, 2017 | The Mary Elizabeth Shankle Family Trust gives \$1,250,342 to General University |
| Summer, 2017 | Garry A. Weber '58 gives \$1,000,000 in support of Football Locker Room Renovation |
| October 13, 2017 | Dedication of the Payne Stewart SMU Golf Training Center at Trinity Forest Golf Club |

| Date | Event |
|-------------------|---|
| October 19, 2017 | Reception celebrating the acquisition of Congressman Sam Johnson's papers and his gift of a new endowment |
| November 3, 2017 | Dedication of Robson & Lindley Aquatics Center |
| November 13, 2017 | North Texas leaders briefing, Federal Reserve Bank of Dallas |
| November 16, 2017 | Houston leaders briefing luncheon |
| Fall, 2017 | Linda W. Hart '65 and Milledge A. Hart, III commit \$5,000,000 to the Gerald J. Ford Research and Innovation Building, moving the Hart eCenter and Guildhall to campus |
| Fall, 2017 | Donors commit over \$5,000,000 in honor of Kyle Miller in support of the Kyle Miller Energy Management Program in the Maguire Energy Institute at Cox, the Kyle Miller Energy Scholarship Fund for BBA and MBA scholarships, and the Indoor Performance Center (Armstrong Fieldhouse). The drive was led by Tucker Bridwell |
| Fall, 2017 | Over \$5,000,000 received from the Estate of Jeanne Roach Johnson for the Jeanne R. Johnson Scholarship Fund in Cox and the Music Division in Meadows |
| Fall, 2017 | Hamon Foundation provides \$2,000,000 in support of summer engineering campus and establishes the Jake Hamon Engineering Scholars program |
| Fall, 2017 | The Moody Foundation commits a total of \$1,000,000 to Meadows renovations and Simmons faculty research |
| Fall, 2017 | Garry A. Weber '58 commits \$1,000,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Winter, 2018 | Gene H. Bishop and Kathy S. Bishop commit \$6,200,000, for a purpose to be determined at a later date |
| Winter, 2018 | Andrew H. Chen and Elain T. Chen commit \$2,000,000 to establish the Andrew H. Chen Chair in Financial Investments |
| April 14, 2018 | Reception in conjunction with Spring Football Game to launch Indoor Performance Center (Armstrong Fieldhouse) project |
| April 23, 2018 | Hamon Charitable Foundation Gift Celebration |
| Spring, 2018 | Bradley E. Cox and Catherine C. Cox commit \$1,000,000 for The Timonthy Lee Morrison Memorial Business Scholarship |
| Spring, 2018 | Penny and Paul Loyd commit \$4,000,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Spring, 2018 | Liz Martin Armstrong '82 and Bill Armstrong '82 commit an additional \$1,500,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Spring, 2018 | Stephanie Chantilis Bray '85 and Bennie M. Bray commit \$1,000,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Spring, 2018 | Ashley and Stacy Smith commit \$1,000,000 to the Indoor Performance Center (Armstrong Fieldhouse) |
| Spring, 2018 | Daniel M. Doyle, Jr. and Nicole Kudelko Doyle '94 commit \$1,000,000 to the President's Discretionary Fund |

| Date | Event |
|--------------------|---|
| Summer, 2018 | An anonymous donor commits \$3,000,000 to establish the Robert B. Rowling Center for Business Law & Leadership in Dedman Law |
| Summer, 2018 | Hoblitzelle Foundation commits \$1,250,000 to renovation of the Meadows Arts Center |
| Summer, 2018 | Carolyn Fulgham Butcher '62 and Preston Butcher commit \$1,000,000 to establish the Carolyn Fulgham Butcher and Preston Butcher Family Excellence Scholarship in honor of Helen and Everett Fulgham |
| Summer, 2018 | Carolyn Covey Morris and Nigel Morris commit \$1,000,000 to Meadows CCPA Students Scholarship Support |
| September 7, 2018 | Announcement of a partnership with DISD and Toyota, creating a new STEM school in West Dallas. Toyota USA Foundations supports the initiative with a \$2,000,000 grant to Simmons School |
| September 14, 2018 | Event announcing a commitment of \$5,000,000 from Mary C. Templeton and Richard K. Templeton establishing the Templeton Research Excellence Fund at Lyle |
| Fall, 2018 | The Estate of Gayle David Fogelson gives \$1,750,000 to the Gayle David Fogelson Endowment for Dedman College |
| Fall, 2018 | Katy A. Miller and Kyle D. Miller '01 commit \$1,000,000 to the Katy A. and Kyle D. Miller Energy Management Scholarship in Cox |
| Fall, 2018 | David B. Miller '72, '73 and Carolyn L. Miller and David B. Miller Family Foundation commit \$2,700,000 to Athletics |
| Fall, 2018 | Lilly Endowment commits \$1,000,000 to support Youth Ministry in Perkins School |
| Fall, 2018 | SMU announces more than \$212,000,000 has been committed to the upcoming campaign |
| December 5, 2018 | Moody Coliseum Basketball Court renamed in honor of David Miller |
| December, 2018 | Carl Sewell '66 and Peggy Higgins Sewell '72 commit \$1,600,000 to Athletics, Cox, Dedman College |
| January 1, 2019 | Board Special Committee on Development renamed Campaign Leadership Council |
| Winter, 2019 | Campaign Leadership Council approves endowment naming levels, volunteer structure, accounting period for new campaign |
| Winter, 2019 | Marlyne Sexton commits \$5,000,000 to Meadows Arts Center renovation |
| Winter, 2019 | Anne R. Bromberg commits \$2,000,000 faculty position in Meadows, and support for Dedman Law, Meadows Museum |
| Winter, 2019 | Jerry Bywaters Cochran '58 provides \$1,500,000 art collection to University Art Collection |

| Date | Event |
|-------------------|--|
| Winter, 2019 | Linda W. Hart '65 and Milledge A. Hart, III commit \$1,250,000 to establish the Milledge A. Hart, III Scholarship Fund for Veterans of The United States Marine Corps |
| Winter, 2019 | The Andrew W. Mellon Foundation commits \$1,000,000 to SMU DataArts, The National Center for Arts Research, Meadows School |
| January 25, 2019 | Event announcing the establishment of the Linda and Mitch Hart Institute for Technology, Innovation and Entrepreneurship, through a gift of \$6,500,000 from Linda W. Hart '65 and Milledge A. Hart, III |
| February 22, 2019 | Groundbreaking ceremony for the Ford Research and Innovation Building, lead donors Gerald J. Ford '66, '69 and Kelli O. Ford |
| March 5, 2019 | Annual Giving Day |
| March 13, 2019 | President's Associates Celebration |
| May 15, 2019 | Faculty and Staff Donor Reception |
| Summer, 2019 | Nancy and Richard Rogers commit \$5,000,000 to Meadows Arts Center renovation, naming the Nancy C. and Richard R. Rogers Center for Visual Arts |
| Summer, 2019 | Diane and Hal Brierly provide an additional \$5,000,000 to the Brierley Institute in Customer Engagement in Cox |
| Summer, 2019 | Highland Park United Methodist Church provides \$3,000,000 toward the Hillcrest Parking Center |
| Summer, 2019 | Garry A. Weber '58 adds \$1,000,000 to his Armstrong Fieldhouse commitment |
| Summer, 2019 | Liz Martin Armstrong '82 and Bill Armstrong '82 commit \$7 million, naming Armstrong Fieldhouse |
| September, 2019 | Campaign Steering Committees begin meeting |
| September 6, 2019 | Armstrong Fieldhouse dedication event |
| October 18, 2019 | Public announcement of \$50,000,000 commitment from David B. Miller '72, '73 and Carolyn L. Miller and David B. Miller Family Foundation to Cox School of Business, representing the first alumnus gift of its size to SMU |
| October 25, 2019 | Celebration of Bobby Lyle gift designation in support of Lyle School New Strategic Vision |
| November 8, 2019 | Meadows Arts Center renovation and expansion project kickoff event |
| November 12, 2019 | Public event announcing \$100,000,000 commitment from Moody Foundation to establish Moody School of Graduate and Advanced Studies, representing the largest single gift in SMU history |
| December 5, 2019 | First Campaign Executive Committee meeting |
| February 25, 2020 | Reception announcing a commitment of \$5,000,000 from Ray W. Washburne '84 and family, to name the Washburne Soccer and Track Stadium |

| Date | Event |
|--------------------|--|
| February, 2020 | Ashlee Hunt Kleinert and Chris Kleinert commit \$1,000,000 total to Dedman College Scholars and Embrey Human Right Program |
| Spring, 2020 | Joe Hardt and Marie M. Park provide \$1.075M for the Center for Preaching Excellence, Perkins School |
| June, 2020 | Hillcrest Parking Center Opens, made possible through financial partnership with Highland Park United Methodist Church |
| May 7, 2020 | Campaign Executive Committee meeting |
| May 31, 2020 | Pony Power exceeds its \$150,000,000 three-year goal |
| May 31, 2020 | SMU receives record gift revenue in a fiscal year 2020: \$121, 508,089 |
| September, 2020 | Gay and Bill '64 Solomon commit matching gift of \$1,000,000 for Perkins Chapel organ, in honor of Caren and Vin Prothro |
| September 18, 2020 | Announcement of a \$15,000,000 commitment from Gina L. Bridwell and Tucker S. Bridwell '73, '74 supporting the Bridwell Institute for Economic Freedom and the Cox School Renovation and Expansion project |
| Fall, 2020 | Carter Creech '60, '63 commits \$1,500,000 to the Middle School College and Career Readiness Program in Simmons School |
| Fall, 2020 | Linda W. Hart '65 and Milledge A. Hart, III commit \$1,750,000 to the Hart Center for Engineering Leadership in the Lyle School |
| Fall, 2020 | Lilly Endowment, Inc. commits \$999,975 to the Theological Congregational Ministry program in Perkins School |
| Fall, 2020 | Shelli Mims Lindley and Steven J. Lindley '74 commit \$1,200,000 to the Robson-Lindley Aquatics Center Phase II project |
| Fall, 2020 | Total for anticipated new campaign exceeds \$500,000,000 |
| October 3, 2020 | Washburne Soccer and Track Stadium Groundbreaking Ceremony |
| October 8, 2020 | Aurelia C. Heppner and Brad K. Heppner '88 Gift Announcement, supporting Cox School Renovation and Expansion project and the Heppner Faculty Research Fund in Cox |
| October 15, 2020 | Cox100 Gala and inaugural presentation of the Cox Visionary Award to Edwin L. Cox, Sr. '42 |
| November 13, 2020 | Public Announcement of a commitment of \$7,500,000 from Jane R. and Pat S. Bolin '73 to the Cox School Renovation and Expansion project |
| December 3, 2020 | Campaign Executive Committee Meeting |
| December 4, 2020 | Dedication of Gerald J. Ford Hall for Research and Innovation |
| December, 2020 | Anonymous gift of \$3,000,000 received by Perkins School |
| February, 2021 | Bill Armstrong '82 and Liz Martin Armstrong '82 and The Armstrong Foundation commit \$1,000,000 to the Vision 2025 Football Support Fund |

| Date | Event |
|-------------------|---|
| February, 2021 | Joshua E. Oren '94, '99 and Lisa Harmon Oren '98 commit \$1,000,000 to the Hughes-Trigg Expansion and Renovation project, naming the Oren Auditorium |
| February 26, 2021 | Rich and Mary Templeton commit \$5,000,000 for Templeton Ph.D. Fellowships, Lyle School |
| April 8, 2021 | Public announcement of a commitment of \$15,000,000 from Bryan S. Sheffield '01 and Sharoll M. Sheffield to the Cox School Renovation and Expansion project |
| April 13, 2021 | Annual Giving Day |
| Spring, 2021 | An anonymous donor commits \$5,000,000 to the Cox School Renovation and Expansion project |
| Spring, 2021 | Carter Creech '60, '63 commits \$3,500,000 to the West Dallas STEM School, Simmons School |
| Spring, 2021 | Frederick B. Hegi, Jr. '66 and Jan Vestal Hegi '66, The Hegi Family commit \$1,000,000 to the Hegi Career Center |
| Spring, 2021 | Barry M. Kitt and Beth M. Kitt commit \$1,000,000 to the Cox School Renovation and Expansion project |
| Spring, 2021 | Jeremy M. Lacy '96 commits \$1,200,000 to Cox School scholarships |
| Spring, 2021 | Jennifer Overstreet Styslinger '86 and Mark J. Styslinger '87 commit \$4,000,000 to the SMU Tennis Complex and the Tennis Excellence Fund |
| May 6, 2021 | Campaign Executive Committee Meeting |
| May 7, 2021 | Board of Trustees approves campaign public phase launch in September, 2021 |
| August 26, 2021 | Public announcement of a commitment of \$3,000,000 from Linda Pitts Custard '60, '99, and William A. Custard '57 to establish the Custard Institute for Spanish Art and Culture, Meadows Museum |
| September, 2021 | Edwin L. Cox '42 commits \$5,000,000 to scholarship in the Cox School |
| September, 2021 | John R. Ingram and Stephanie H. Ingram commit \$2,000,000 to the Ingram Family Mustang Scholarship |
| September, 2021 | Alessandra Comini commits \$2,000,000 to the Alessandra Comini Fellowship and the Alessandra Comini Professorship in European Music History, Meadows School |
| September, 2021 | Teddlie Family Trust commits \$1,400,000 to general university scholarships |
| September, 2021 | Allison T. Benners and Frederick H. Benners, Jr. '90, '97 commit \$1,000,000 to the Cox School Renovation and Expansion project |
| September, 2021 | Charles R. Emrich '79 commits \$1,000,000 to create the Charles R. Emrich Endowed Scholarship |
| September, 2021 | Bruce A. Robson '74 and Emily K. Robson commit \$1,000,000 to the Robson-Lindley Aquatics Center Phase II project |
| September, 2021 | Carl Sewell '66 and Peggy Higgins Sewell '72 commit \$1,000,000 to the renovation of the Meadows Arts Center |

| Date | Event |
|--------------------|--|
| September 11, 2021 | Rotunda Families Inaugural Reception |
| September 16, 2021 | Campaign Executive Committee Meeting |
| September 16, 2021 | Board of Trustees Campaign Launch Preview Dinner |
| September 17, 2021 | Campus Campaign Kickoff event; over \$654 million committed to date |
| September 21, 2021 | Civic and Community Campaign Launch, AT&T Discovery District |
| October 1, 2021 | Public announcement of a commitment of \$6,000,000 from Kim M. Shaddock and William C. Shaddock '74 to the Cox School Renovation and Expansion project |
| October 1, 2021 | Hughes-Trigg Student Center Renovation Celebration |
| October 29, 2021 | Houston Campaign Celebration |
| December 3, 2021 | Frances Anne Moody Hall Groundbreaking |
| December 9, 2021 | Atlanta Campaign Celebration |
| Fall, 2021 | Katy A. Miller and Kyle D. Miller '01 commit \$5,000,000 to the Cox School Renovation and Expansion project |
| Fall, 2021 | An anonymous commitment of \$4,371,380 is given in support of ManeFrame III |
| Fall, 2021 | Jo A. Hickman and Family commit \$2,500,000 to the Robson-Lindley Aquatics Center Phase II project |
| Fall, 2021 | Bloomberg Philanthropies gives \$2,500,000 to SMU DataArts, The National Center for Arts Research, Meadows School |
| Fall, 2021 | The Deason Foundation commits \$2,500,000 to The Deason Criminal Justice Reform Center, Dedman Law |
| Fall, 2021 | O'Donnell Foundation commits \$2,000,000 to create the Peter O'Donnell, Jr. Director of the Data Science Institute |
| Fall, 2021 | Mark C. Griege '81 and Peggy Griege commit \$1,000,000 to the Cox School Renovation and Expansion project |
| Fall, 2021 | Jerry William Pittman '58 commits \$1,000,000 to the SMU Golf Program |
| Fall, 2021 | Leland B. White '72 and Monica Hillenbrand White '87 commit \$1,000,000 to the President's Discretionary Fund |
| January 21, 2022 | Event celebrating \$50,000,000 commitment from Garry A. Weber '58 to name Garry Weber End Zone Complex |
| February, 2022 | Anonymous donor commits \$6,000,000 to the Cox School Renovation and Expansion project |
| February, 2022 | Gary T. Crum '69 and Sylvie P. Crum commit \$5,000,000 to the Cox School Renovation and Expansion project |
| February, 2022 | Michael T. McGuire '05 and Natalie K. McGuire commit \$1,500,000 to the Cox School Renovation and Expansion project |
| February, 2022 | Morris Foundation (Kenneth R. Morris '72 and Linda A. Morris) commits \$1,500,000 to the Cox School Renovation and Expansion project |

| Date | Event |
|----------------|--|
| February, 2022 | Katherine E. Georgas and William J. Georgas commit \$1,000,000 to the Cox School Renovation and Expansion project |
| February, 2022 | Mimi Vanderstraaten and William H. Vanderstraaten '82 commit \$1,000,000 to the SMU Cox Real Estate ImpactFund |
| February, 2022 | Hamon CharitableFoundation commits \$3,100,000 to the Hamon Scholarship and the Hamon STEM Education Program, Lyle School |
| February, 2022 | Belle Stumberg Berg '71and Donald A. Berg '70,'77 commit \$1,000,000 to establish the Belle and Donald BergResearch Excellence Fund, Lyle School |
| February, 2022 | John C. Thomas '88 and Wendy Thomas commit \$5,000,000 to name Thomas House |
| February, 2022 | Nancy Ann Hunter Hunt'65 and Ray L. Hunt '65 commit \$2,000,000 to establish the Judge Elmo B. Hunter Legal Center for Victims of Crimes Against Women, Dedman Law |
| February, 2022 | Eula Mae and John Baugh Foundation commits \$2,700,000 in support of the Baptist House of Studies Program, Perkins School |
| February, 2022 | The Andrew W. MellonFoundation commits \$1,000,000 to SMU DataArts, The NationalCenter for Arts Research, Meadows School |
| February, 2022 | The Dedman Foundation and Family commit \$5,000,000 need-based scholarships and other campaign priorities |
| March 22, 2022 | Annual Giving Day |
| April 7, 2022 | Hickman Outdoor Pool groundbreaking ceremony |
| April 8, 2022 | Dedication ceremony for Washburne Soccer and Track Stadium |
| April 28, 2022 | Public announcement of a commitment from Dr. William Spears representing the largest non-alumnus gift in SMU history and establishing the William S. Spears Institute for Entrepreneurial Leadership, Cox School |
| May 5, 2022 | Campaign Executive Committee Meeting |
| May 6, 2022 | Groundbreaking ceremony for the Cox School Renovation and Expansion project |
| May, 2022 | Jennifer Tucker Clyde '85 and R. Andrew Clyde '85 and Murphy USA Charitable Foundation commit \$1,000,000 for the Cox School Renovation and Expansion project |
| May, 2022 | Kelly Hoglund Compton '79 commits \$1,250,000 to the Campaign |
| May, 2022 | Susan Smith Cooper '62 and William R. Cooper '58 commit \$2,000,000 for the Cox School Renovation and Expansion project |
| May, 2022 | Harlan R. Crow and Katherine Raymond Crow '94 commit \$1,000,000 for the Cox School Renovation and Expansion project |
| May, 2022 | Fritz Duda and Mary Lee Duda and the Fritz and Mary Lee Duda Foundation commit \$5,000,000 for the Cox School Renovation and Expansion project |

| Date | Event |
|--------------------|--|
| May, 2022 | D. Bobbitt Noel, Jr. '76 and Karen H. Noel commit \$1,000,000 to the Dedman School of Law |
| May 6, 2022 | Groundbreaking ceremony for the Cox School Renovation and Expansion project |
| June 13, 2022 | Los Angeles Campaign Celebration (SoFi Stadium) |
| September 16, 2022 | Dedication of the Meadows Fine Arts Center renovation and expansion project |
| September, 2022 | Deason Foundation/Doug Deason commit a combined \$2,500,000 to the Darwin Deason Institute for Cyber Security Endowment Fund and the Deason Innovation Gym, Lyle School |
| September, 2022 | Estate of Cary M. Maguire commits a total of \$1,500,000 to the Cary M. Maguire Center for Ethics and Public Responsibility and the Maguire Energy Institute, Cox School |
| September, 2022 | The Cain Foundation commits \$1,150,000 to the Cain Denius Business Law Boot Camp |
| September, 2022 | J. Timothy Brittan commits \$1,100,000 to the Equestrian Program |
| September, 2022 | Bert A. Getz '89 and Susan Getz commit \$1,000,000 to the Cox School Renovation and Expansion project |
| September, 2022 | Charles Koch Foundation commits \$1,050,000 to the Deason Criminal Justice Reform Center, Dedman Law |
| September, 2022 | Mark S. Moussa '80 commits \$1,000,000 to the Meadows Arts Center Renovation project |
| September 23, 2022 | Rotunda Families Reception |
| September 23, 2022 | Bill Armstrong '82 and Liz Martin Armstrong '82 announce \$15,000,000 commitment to Garry Weber End Zone Complex at a Pep Rally the night before TCU game |
| September 28, 2022 | Event honoring Lyle School Major Donors |
| October 20, 2022 | Luncheon to announce a commitment of \$5,000,000 from Bill Armstrong '82 and Liz Martin Armstrong '82 naming the Elisabeth Martin Armstrong Dean of Dedman College |
| October 21, 2022 | Homecoming Campaign Donor Reception |
| November 15, 2022 | NVIDIA SuperPOD Ribbon Cutting Ceremony |
| December 1, 2022 | Campaign Executive Committee Meeting |
| December 1, 2022 | Trustee Dinner celebrating Mustang Award Recipients |
| December 2, 2022 | Groundbreaking ceremony for Garry Weber End Zone Complex |
| December, 2022 | An anonymous donor commits \$1,000,000 to the Perkins School for scholarships and other purposes |
| December, 2022 | Jennifer Gelety Flanagan '82 and Martin L. Flanagan '82 commit \$5,000,000 to the Garry Weber End Zone Complex project |
| December, 2022 | David R. Grieve '84 and Kathleen M. Grieve commit \$1,000,000 to the Campaign |
| December, 2022 | Paula H. Rhines and Walden C. "Wally" Rhines '75 commit \$1,250,000 to the Lyle School to establish a faculty position in Quantum Informatics |

| Date | Event |
|-------------------|--|
| December, 2022 | William J. Ware '01 commits \$2,000,000 to the Garry Weber End Zone Complex project |
| February, 2023 | An anonymous donor commits \$1,000,000 to the Cox School Renovation and Expansion project |
| February, 2023 | Anita Ray Arnold and Truman Arnold commit \$1,000,000 to the Meadows Arts Center renovation project |
| February, 2023 | The Jeanne R. Johnson Foundation commits \$1,600,000 to scholarships in Cox and Meadows |
| February, 2023 | Jack D. Knox '60, '63 commits \$11,000,000 to the Campaign |
| February, 2023 | Cary M. Maguire Foundation commits \$2,000,000 total to the Cox School Renovation and Expansion project and the Maguire Energy Institute |
| February 24, 2023 | Event announcing a commitment of \$20,000,000 from Mary C. Templeton and Richard K. Templeton, supporting education and research and endowing the Dean's position, Lyle School |
| March 7, 2023 | Annual Giving Day |
| April 18, 2023 | Meadows Executive Board celebration of a commitment of \$15,000,000 from G. Marlyne Sexton to establish the G. Marlyne Sexton Institute for Musical Theatre and the G. Marlyne Sexton Director of Musical Theatre at Meadows |
| May 4, 2023 | Campaign Executive Committee meeting |
| May 5, 2023 | Luncheon announcing a commitment of \$30,000,000 from Jan and Trevor D. Rees-Jones '78 to establish the Rees-Jones Library of the American West, including construction and endowment support. In subsequent years the donors provide numerous additional significant gifts for collection acquisitions. |
| May 11, 2023 | Event co-hosted with Tyle Junior College announcing a commitment of \$1,000,000 from Ann Warmack Brookshire '77 and Bradley W. Brookshire '76 to establish the Brookshire SMU/Tyler Junior College Transfer Scholarship, Cox School |
| May, 2023 | Richard Ware '68 commits \$3,000,000 to the Garry Weber End Zone Complex |
| May, 2023 | Robert Gotovac, Jr. '86 commitments \$1,000,000 to the Garry Weber End Zone Complex project |
| May, 2023 | J. Stephen Lockton '89 and Samantha A. Lockton and Stephen Lockton Family Foundation commit \$1,000,000 to the Garry Weber End Zone Complex project |
| May, 2023 | The Estate of Mary Frances McClure Burleson '57, '97 gives \$1,400,000 to SMU |
| May, 2023 | Clements Foundation commits \$1,000,000 to the Scholars' Den renovation project in Clement Hall |
| May, 2023 | Leland B. White '72 and Monica Hillenbrand White '87 commit a total of \$1,000,000 to Opportunity SMU and Engineering scholarships |

| Date | Event |
|--------------------|---|
| May, 2023 | The Phillips Foundation commits \$1,700,000 total to the Creative and Social Impact Lab (Meadows) and the Real Estate Impact Fund (Cox) |
| May, 2023 | Sarah Fullinwider Perot '83 and Ross Perot, Jr. and The Sarah and Ross Perot, Jr. Foundation commit \$1,000,000 to The Thomas W. Luce, III Centennial Dedman Law Scholars Program |
| Summer, 2023 | SMU designated "top 50" university in terms of fundraising revenue by the Council for the Advancement and Support of Education (CASE) |
| August 23, 2023 | Announcement at annual all-faculty meeting of a \$30,000,000 commitment from O'Donnell Foundation in support of the O'Donnell Data Science and Research Computing Institute (Provost Office) and the Initiative for Digital Innovation in Engineering and Computer Science (Lyle School), including faculty positions, research funds and student support |
| September 1, 2023 | Event announcing SMU's entry into ACC July 1, 2024 |
| September 15, 2023 | Dedication of Frances Anne Moody Hall |
| September, 2023 | An anonymous donor commits \$1,000,000 to the Applied Physiology and Sport Management Program, Simmons School |
| September, 2023 | An anonymous donor commits \$1,000,000 to General University and Dedman College scholarships |
| September, 2023 | Kimberly Knollin Carter '81 and Thomas E. Carter '80 commit \$1,200,000 in support of scholarships |
| September, 2023 | Linda Gladden commits \$2,500,000 in support of scholarships |
| September, 2023 | Cindy L. Havens and G. Paul Havens commit a total of \$2,000,000 to the Sterling R. E. Havens Professorship of Creative Writing Fiction and the Sterling R. E. Havens Writing and Reasoning Program |
| September, 2023 | Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 commit \$1,225,000 to the Simmons School and to the Nancy Ann and Ray L. Hunt Leadership Scholars Program |
| September, 2023 | The Estate of Raymond L. Norbury, Jr. give \$1,000,000 to Lyle Engineering |
| September, 2023 | A. Wellford Tabor and Ann V. Tabor commit \$1,000,000 the Bridwell Institute for Economic Freedom and renovation project (Cox School), and Athletics (in honor of Tucker Bridwell) |
| September, 2023 | Antonio Villeda '82 and Maria F. Villeda commit \$1,000,000 to Dedman Law |
| September, 2023 | Robert A. Wilson '67 and Susan Cooper Wilson '67 and The Robert A. and Susan C. Wilson Foundation commit \$1,000,000 to the Cox School Renovation and Expansion project |
| September 18, 2023 | SMU announces \$100,000,000 committed in seven days in support of joining the ACC |
| September 20, 2023 | Houston Major Donor Reception |
| September 26, 2023 | New York City Campaign Celebration |

| Date | Event |
|--------------------|---|
| September 29, 2023 | Rotunda Families Reception |
| October 4, 2023 | Custard Institute for Spanish Art and Culture at the Meadows Museum Dedication Event |
| October 27, 2023 | Homecoming Campaign Donor Reception |
| Fall, 2023 | An anonymous donor commits \$1,000,000 to the ACC Competitiveness Campaign |
| Fall, 2023 | Nancy McMillan Dedman '50 commits \$1,000,000 to the ACC Competitiveness Campaign |
| Fall, 2023 | Rachael Redeker Dedman '96 and Robert H. Dedman, Jr. '80, '84 commit \$1,000,000 to the ACC Competitiveness Campaign |
| Fall, 2023 | Clark K. Hunt '87 and Tavia S. Hunt commit \$1,000,000 to the ACC Competitiveness Campaign |
| Fall, 2023 | Warren G. Lichtenstein commits a total of \$1,000,000 to the ACC Competitiveness Campaign and the Cox Renovation and Expansion project |
| Fall, 2023 | Bruce A. Robson '74 and Emily K. Robson commit \$1,000,000 to the ACC Competitiveness Campaign |
| Fall, 2023 | Randi Scheel Barnes '76 and Shepard E. Barnes '76 commit \$1,000,000 total to Athletics and Cox Scholarships |
| Fall, 2023 | Joseph G. Beard, Sr. '83 and Sherry H. Beard commit \$2,000,000 to the Garry Weber End Zone Complex |
| Fall, 2023 | Justin B. Cox '08 and Molly Macatee Cox '08 commit \$1,000,000 to the Cox Renovation and Expansion project |
| Fall, 2023 | Pedie O. Bramblett Danis '95 commits \$1,000,000 to Faculty Research in Dedman Law |
| Fall, 2023 | Steven J. Lindley '74 and Shelli Mims Lindley commit \$1,000,000 to the Cox Renovation and Expansion project |
| Fall, 2023 | Allison Wortley and Michael J. Wortley '98 commit a total of \$7,500,000 to the ACC Competitiveness Campaign and Mustang Football |
| Fall, 2023 | Barbara Lovingfoss Mayfield '86 commits \$1,350,000 to Meadows School |
| December 7, 2023 | Campaign Executive Committee meeting |
| December 8, 2023 | Dedication of Holt Hickman Outdoor Pool at the Robson & Lindley Aquatics Center |
| December, 2023 | Carl Sewell '66 and Peggy Higgins Sewell '72 commit a total of \$4,550,000 to Athletics Circle of Champions, Sewell BBA Scholars, and Dedman College Scholars |
| Winter, 2024 | Anita Ray Arnold and Truman Arnold commit \$5,000,000 to the Cox Renovation and Expansion project |
| Winter, 2024 | Carter B. Ewing and Sarah A. Ewing commit \$1,000,000 to the Garry Weber End Zone Complex |
| Winter, 2024 | The Jeanne R. Johnson Foundation gives a total of \$4,700,000 to the Cox Renovation and Expansion project, the Division of |

| Date | Event |
|-------------------|--|
| | Music, and the Jeanne R. Johnson Music Faculty Excellence Fund |
| Winter, 2024 | Catherine Susser and Sam L. Susser and Susser Bank Holdings, LLC commit \$1,000,000 to the Cox Renovation and Expansion project |
| Winter, 2024 | Leland B. White '72 and Monica Hillenbrand white '87 commit a total of \$1,000,000 to the ACC Competitiveness Campaign, the Leland White Family Engineering Scholars and Opportunity SMU scholarship and retention program |
| Winter, 2024 | Billie Ida Forrester '74 and Mack O. Forrester commit \$1,000,000 to the Cox Renovation and Expansion project |
| Winter, 2024 | Claire Morris Spaht '94 and Spaht Family Foundation commit \$2,000,000 in support of the Division of Art chairperson position and a Meadows Student Immersion fund |
| February 23, 2024 | Insiders Briefing and Luncheon for ACC Competitiveness Campaign donors and volunteers |
| March 5, 2024 | Annual Giving Day |
| Spring, 2024 | An anonymous estate provides a total of \$3,500,000 to Meadows Museum and Meadows School |
| Spring, 2024 | Diane M. Brierley and Harold M. Brierley commit \$1,500,000 to the Cox Renovation and Expansion project |
| Spring, 2024 | NexPoint Advisors, L.P. commits \$3,000,000 to the Cox Renovation and Expansion project |
| Spring, 2024 | Tracey Nash-Huntley '81 and David S. Huntley '80, '82 commit a total of \$1,000,000 to Dedman Law Centennial Scholarship, Dedman College Scholars, and the Connect Mentoring Program |
| Spring, 2024 | Karen Johnson Scharbauer '74 commits \$1,000,000 to the ACC Competitiveness Campaign |
| Spring, 2024 | Sarah A. Scharbauer '03 commits \$1,000,000 to the ACC Competitiveness Campaign |
| May 2, 2024 | Campaign Executive Committee meeting |
| May 3, 2024 | Dedication of the David B. Miller Business Quadrangle |
| May 23, 2024 | Gayle Stoffel commits \$1,000,000 to the Gayle and Paul Stoffel Scholars Fund, Meadows School |
| May 29, 2024 | Laurie-Leigh Nix White '07, '08 and Charles E. White, III commit a total of \$1,200,000 to the Cox School and Athletics |
| Spring, 2024 | Linda W. Hart '65 and Milledge A. Hart, III commit a total of \$4,000,000 to the Cox Renovation and Expansion project and to the David Gergen Director of the Center for Presidential History (Dedman College) |
| July 1, 2024 | Event celebrating SMU's official entry into ACC |
| Summer, 2024 | Anita Ray Arnold and Truman Arnold commit an additional \$3,000,000 to the Cox Renovation and Expansion project |
| Summer, 2024 | Arnold Ventures commits \$1,758,294 to the Deason Criminal Justice Reform Center, Dedman Law |

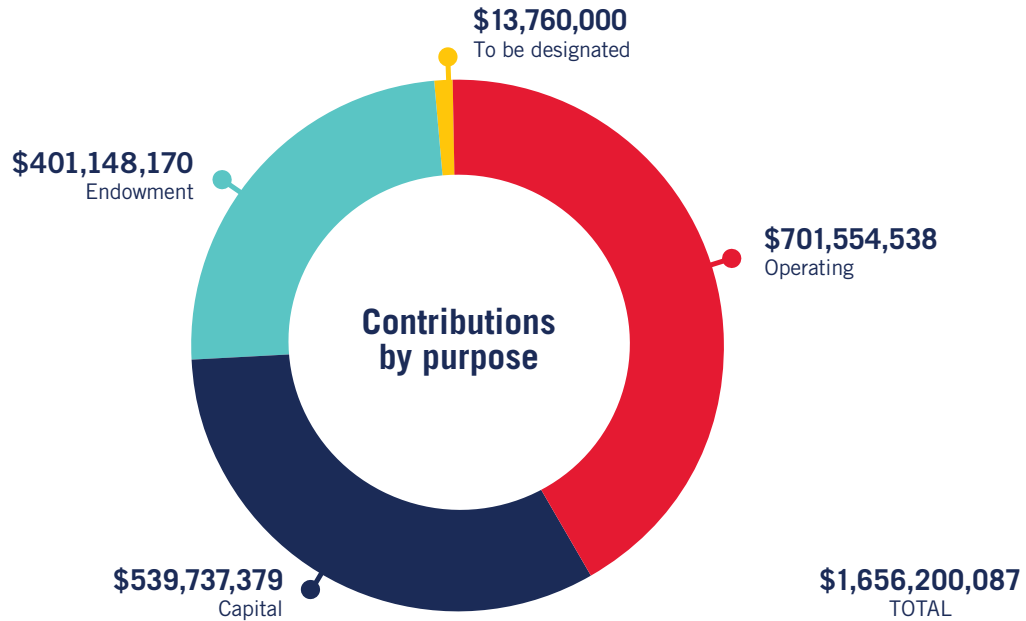
| Date | Event |
|--------------------|--|
| Summer, 2024 | The Estate of Anne R. Bromberg gives \$3,500,000 to Dedman Law |
| Summer, 2024 | Matthew H. Fleegeer '87 and Valerie "Candee" Fleegeer '86, '90 and the Fleegeer Family Foundation commit a total of \$2,000,000 to the ACC Competitiveness Campaign and the Garry Weber End Zone Complex project |
| Summer, 2024 | Linda L. Gardner and W. Fred Alsup commit a total of \$1,800,000 to the Alsup Senior Curate and the Alsup Fellowship of Spanish Art, Meadows Museum |
| Summer, 2024 | Jeremy M. Lacy '96 commits a total of \$1,000,000 to the Lacy Mustang Athletic Fund and the Lacy Scholarship Fund |
| Summer, 2024 | Jodi K. Pratt and Kenneth W. Pratt commit \$1,000,000 to Basketball Capital Improvements |
| Summer, 2024 | Kim M. Shaddock and William C. Shaddock '74 commit \$1,000,000 to the Garry Weber End Zone Complex project |
| July 8, 2024 | Robert G. Skinner commits \$1,200,000 to general university support |
| September 5, 2024 | Athletics Principal Donor Dinner |
| September 6, 2024 | Garry Weber End Zone Complex Dedication Event |
| September 27, 2024 | Rotunda Families Reception |
| September 30, 2024 | Caren and Vin Prothro Organ Dedication Event |
| October 17, 2024 | Cox Major Donor Celebration |
| Fall, 2024 | An anonymous donor commits \$1,000,000 to Cheer/Pom Operations |
| Fall, 2024 | Addy Foundation commits \$3,500,000 to the Addy Center on Research and Evaluation, Simmons School |
| Fall, 2024 | The Estate of Anne R. Bromberg provides \$3,654,091 to the Meadows Museum |
| Fall, 2024 | Hamon Charitable Foundation commits a total of \$1,297,000 to Hamon Stem Education programs and the Hamon Thrive Scholars program, Lyle School |
| Fall, 2024 | The Estate of Carolyn Vestal Kelly '67, '83 and Thomas L. Kelly '68, '71 provide \$3,500,000 for General University endowment |
| Fall, 2024 | Amy B. Korenvaes and Harlan B. Korenvaes provide \$1,000,000 for the President's Discretionary Fund |
| Fall, 2024 | Paula H. Rhines and Walden C. Rhines '75 provide \$1,500,000 to the Rhines Ph.D. Fellowship, Lyle School |
| November 1, 2024 | Campaign Donor Reception |
| November 18, 2024 | Public event announcing the move of Dallas Institute of Humanities and Culture to Dedman College, including a transfer of \$12,000,000 in assets |
| December 5, 2024 | Campaign Executive Committee Meeting |
| Winter, 2025 | Eula Mae and John Baugh Foundation commits \$1,800,000 to Perkins School |

| Date | Event |
|-------------------|--|
| Winter, 2025 | Kristin S. Johnson and Scott A. Johnson '86 commit a total of \$1,250,000 to the Folsom Real Estate Institute and the Scott and Kristine Johnson Scholarship, Cox School |
| Winter, 2025 | David W. Ley '92 commits a total of \$2,500,000 to the Stephen W. Ley Scholarship Fund, General University, and the Sharon Ley Lietzow Piano Scholarship |
| Winter, 2025 | Lilly Endowment, Inc commits \$2,500,000 to Perkins School |
| Winter, 2025 | Andrew D. Peykoff, II '98 and Jaime E. Peykoff '00 a total of \$5,000,000 to Athletics, Cox Alternative Asset Management Center, and other future purposes |
| Winter, 2025 | Sumners Foundation, Inc. commits \$1,000,000 to Sumners Scholars, Dedman Law |
| February 13, 2025 | SMU achieves R1 Status |
| February 21, 2025 | In anticipation of exceeding financial goal three years ahead of schedule, Trustees vote to conclude the <i>SMU Ignited</i> campaign on May 31, 2025 |
| February 26, 2025 | Dedman Law Centennial VIP Dinner |
| February 27, 2025 | Dedman Law Centennial Alumni and Community Celebration |
| March 5, 2025 | Simmons School Campaign Donor Event |
| March 11, 2025 | Annual Giving Day |
| Spring, 2025 | Undergraduate Student Applications exceed 25,000 |
| April 4, 2025 | Inaugural Spears institute Innovation Awards |
| April 8, 2025 | Houston Donor Reception |
| Spring, 2025 | An anonymous donor commits \$5,000,000 for Simmons School scholarships |
| Spring, 2025 | Belle Stumberg Berg '71 and Donald A. Berg '70, '77 commit \$1,250,000 to create a professorship in Human-Augmented Innovation, Lyle School |
| Spring, 2025 | Martin S. Cox '75, '78 commits a total of \$2,000,000 in support of the Cox Family Professor, and the Laurie Hickman Cox Studio Art Scholarship |
| Spring, 2025 | Alah Elboraa commits \$1,238,250 in support of the SMU ROTC program |
| Spring, 2025 | Sarah A. Scharbauer '03 commits \$1,250,000 to Ford Stadium Turf Enhancements |
| Spring, 2025 | Karen Johnson Scharbauer '74 commits \$1,250,000 to Ford Stadium Turf Enhancements |
| Spring, 2025 | The Staton Foundation commits \$3,000,000 to the First Amendment Clinic, Dedman Law |
| Spring, 2025 | Mary C. Templeton and Richard K. Templeton commit \$1,000,000 to Women's Basketball |
| May 1, 2025 | Final Campaign Executive Committee meeting |
| May 1, 2025 | Rees-Jones Library of the American West Groundbreaking Event |

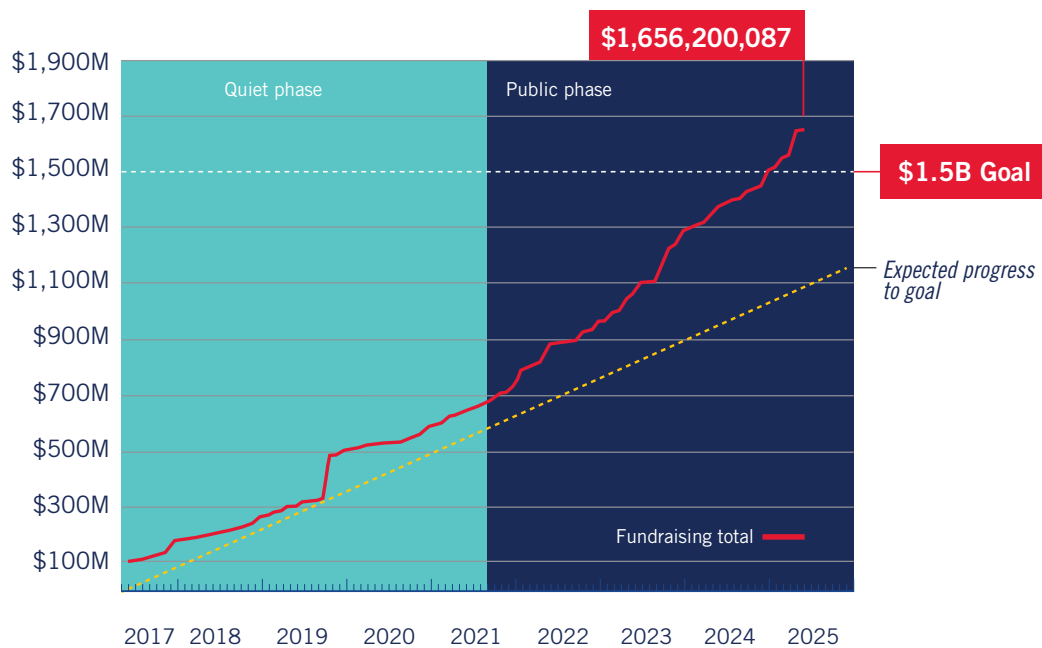
| Date | Event |
|---------------|--|
| May 2, 2025 | Campaign conclusion celebration; \$1,643,426,123 committed to date |
| May 31, 2025 | Campaign accounting concludes |
| June 1, 2025 | Campaign Leadership Council name changes to Trustee Special Committee on Development |
| July 17, 2025 | SMU-in-Taos Dining Hall Renovation Dedication |
| Fall, 2025 | Dedication of <i>SMU Ignited</i> Donor Monument |
| Spring, 2027 | Dedication of Rees-Jones Library of the American West |

Impact

CAMPAIGN TOTALS BY PURPOSE

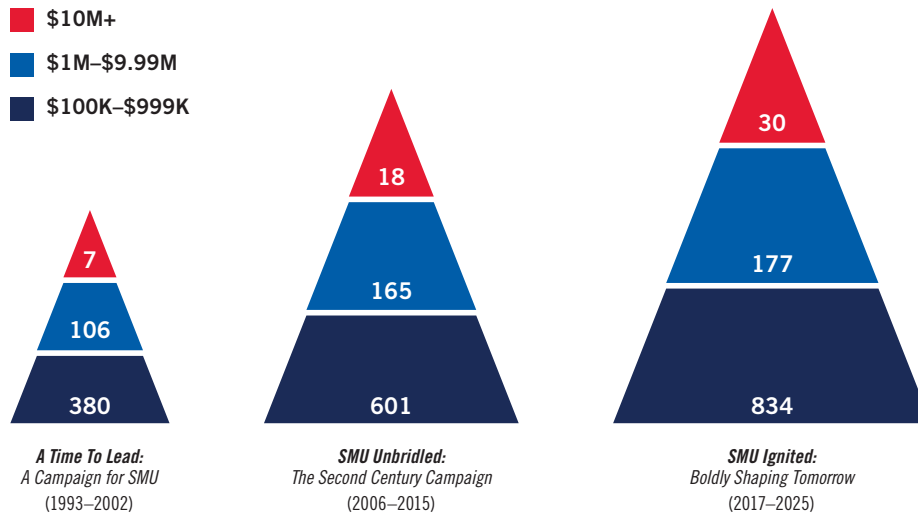


TOTAL COMMITMENTS OVER TIME



DONOR COUNT BY SIZE OF CUMULATIVE COMMITMENTS

Campaign comparison



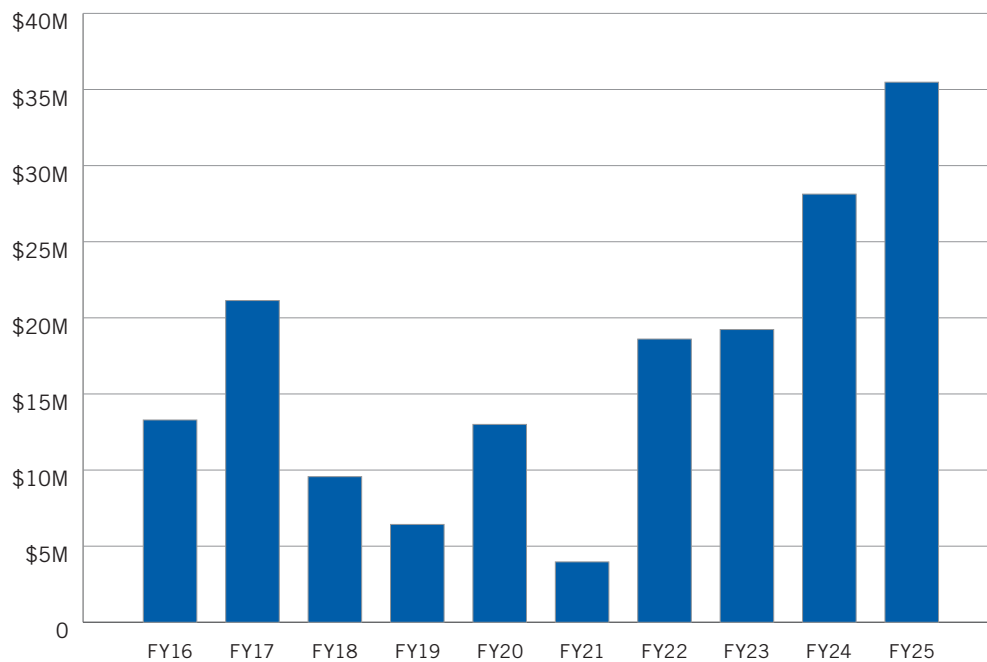
| | <i>A Time To Lead: A Campaign for SMU</i> (1993–2002) | | <i>SMU Unbridled: The Second Century Campaign</i> (2006–2015) | | <i>SMU Ignited: Boldly Shaping Tomorrow</i> (2017–2025) | |
|---------------------|--|---------------|--|-----------------|--|-----------------|
| \$100M | | | | | 2 | \$269,129,545 |
| \$50M–\$99.9M | | | 2 | \$144,566,574 | 3 | \$191,709,319 |
| \$25M–\$49.9M | 2 | \$65,657,159 | 3 | \$125,641,370 | 5 | \$187,780,999 |
| \$10M–\$24.9M | 5 | \$92,897,094 | 13 | \$202,992,244 | 20 | \$274,798,453 |
| \$5M–\$9.9M | 9 | \$61,154,407 | 26 | \$152,591,627 | 19 | \$118,371,454 |
| \$2.5M–\$4.9M | 20 | \$62,921,592 | 31 | \$99,350,164 | 38 | \$131,066,168 |
| \$1M–\$2.4M | 77 | \$109,154,965 | 108 | \$161,343,846 | 120 | \$175,313,760 |
| \$500,000–\$999,999 | 45 | \$149,714,813 | 84 | \$61,437,264 | 108 | \$69,768,630 |
| \$100,000–\$499,999 | 335 | | 517 | \$102,377,521 | 726 | \$135,582,137 |
| \$10,000–\$99,999 | many | | many | \$72,574,501 | many | \$69,733,041 |
| < \$10,000 | many | | many | \$23,326,636 | many | \$32,946,680 |
| TOTAL | 493+ | \$541,500,030 | 784+ | \$1,146,201,747 | 1,041+ | \$1,656,200,087 |

Totals by Campaign Steering Committee

| School/Unit | Total |
|-------------------------|-----------------|
| Cox CSC | \$323,943,404 |
| Dedman College CSC | \$71,360,728 |
| Dedman Law CSC | \$53,765,647 |
| Lyle Engineering CSC | \$97,621,035 |
| Meadows Arts CSC | \$113,309,348 |
| Perkins Theology CSC | \$45,958,161 |
| Simmons Education CSC | \$43,887,897 |
| Athletics CSC | \$374,558,239 |
| Other campaign activity | \$531,795,628 |
| Total | \$1,656,200,087 |

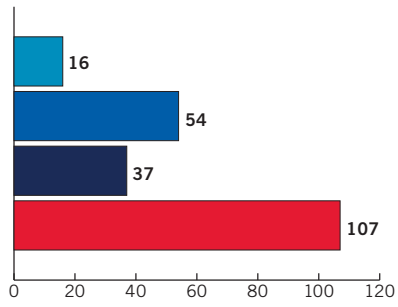
Campaign Planned Giving Commitments (Planning and Public Phase, by Year)

NEW PLANNED GIFTS

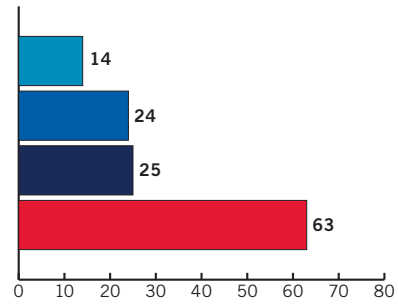


CAMPAIGN IMPACT

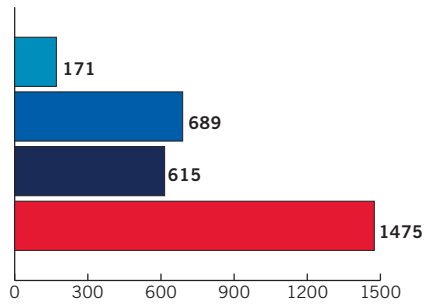
NEW ACADEMIC POSITIONS



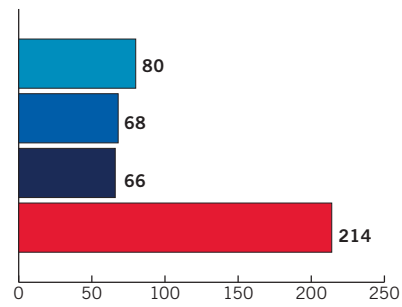
MAJOR NEW OR RENOVATED FACILITIES



NEW ENDOWED SCHOLARSHIPS



NEW ACADEMIC PROGRAMS



SOUTHERN METHODIST UNIVERSITY
SEVEN YEAR REVENUE COMPARISON REPORT BY PURPOSE
As of 5/31/25

| | | FISCAL YEAR | | | | | | |
|----------------------|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | | 2018–2019 | 2019–2020 | 2020–2021 | 2021–2022 | 2022–2023 | 2023–2024 | 2024–2025 |
| OPERATING Purpose | Unrestricted | \$1,678,726 | \$2,149,033 | \$1,511,379 | \$1,707,065 | \$1,312,201 | \$1,325,764 | \$2,771,045 |
| | Academic Division | \$10,567,958 | \$9,449,456 | \$12,295,378 | \$20,549,494 | \$11,794,660 | \$14,126,286 | \$15,194,805 |
| | Athletics | \$4,597,271 | \$5,677,648 | \$8,462,435 | \$9,118,902 | \$7,292,005 | \$25,625,473 | \$30,792,760 |
| | Faculty and Staff Compensation | \$1,649,000 | \$1,503,258 | \$1,277,021 | \$470,191 | \$1,253,660 | \$2,132,695 | \$3,040,737 |
| | Research | \$4,709,432 | \$3,925,467 | \$2,444,437 | \$3,437,323 | \$3,457,433 | \$3,066,195 | \$3,651,132 |
| | Student Affairs/Life | \$909,032 | \$682,812 | \$692,671 | \$923,087 | \$1,028,578 | \$1,463,260 | \$1,859,094 |
| | Student Financial Aid | \$8,661,083 | \$7,743,290 | \$19,120,128 | \$8,205,988 | \$10,326,986 | \$9,494,749 | \$14,143,249 |
| | Other | \$20,966,342 | \$11,557,502 | \$11,384,048 | \$13,563,286 | \$11,696,431 | \$43,053,251 | \$28,695,382 |
| | Total for Operating | \$53,738,845 | \$42,688,466 | \$57,187,497 | \$57,975,336 | \$48,161,954 | \$100,287,673 | \$100,148,203 |
| CAPITAL Purpose | Building and Plant | \$28,982,762 | \$37,275,229 | \$50,638,901 | \$50,286,410 | \$61,059,142 | \$63,701,663 | \$55,568,536 |
| | Endowment: Income Restricted | \$31,148,363 | \$37,993,899 | \$36,928,447 | \$92,747,132 | \$26,785,210 | \$35,507,086 | \$45,008,423 |
| | Loans | \$0 | \$64,025 | \$105,700 | \$3,017 | \$1,945 | \$500 | \$600 |
| | Endowment: Income Unrestricted | \$2,500 | \$245,955 | \$400 | \$6,050 | \$1,075 | \$900 | \$183,804 |
| | Total for Capital | \$60,133,626 | \$75,579,108 | \$87,673,448 | \$143,042,609 | \$87,847,372 | \$99,210,149 | \$100,761,363 |
| TOTAL | | \$113,872,470 | \$118,267,574 | \$144,860,946 | \$201,017,945 | \$136,009,325 | \$199,497,822 | \$200,909,566 |

SOUTHERN METHODIST UNIVERSITY
SEVEN YEAR REVENUE COMPARISON REPORT BY SCHOOL OR UNIT
As of 5/31/25

| | | FISCAL YEAR | | | | | | |
|--------------------------|----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| | | 2018–2019 | 2019–2020 | 2020–2021 | 2021–2022 | 2022–2023 | 2023–2024 | 2024–2025 |
| OPERATING School/Unit | Athletics | \$4,597,271 | \$5,677,648 | \$8,462,435 | \$9,543,902 | \$7,297,035 | \$25,647,974 | \$30,840,144 |
| | Cox School | \$7,050,819 | \$8,617,219 | \$16,195,997 | \$17,330,519 | \$7,180,044 | \$7,675,613 | \$8,801,649 |
| | Dedman College | \$3,700,438 | \$2,789,608 | \$2,519,458 | \$2,680,654 | \$4,102,424 | \$2,735,688 | \$8,755,489 |
| | Dedman School of Law | \$3,331,043 | \$4,410,575 | \$4,060,345 | \$2,432,796 | \$3,806,924 | \$4,182,000 | \$6,795,330 |
| | General University | \$17,521,066 | \$6,058,289 | \$7,923,253 | \$10,684,173 | \$7,153,286 | \$8,424,835 | \$11,692,941 |
| | Lyle School | \$2,423,714 | \$3,583,347 | \$3,605,875 | \$3,300,102 | \$4,097,525 | \$5,338,236 | \$5,765,748 |
| | Meadows School of the Arts | \$8,966,934 | \$6,135,721 | \$5,886,062 | \$6,318,505 | \$7,227,839 | \$6,375,609 | \$6,666,900 |
| | Moody School | \$0 | \$2,000,000 | \$2,400,000 | \$0 | \$1,990,441 | \$3,057,954 | \$4,919,998 |
| | Perkins School | \$2,507,188 | \$1,991,285 | \$3,527,869 | \$2,389,672 | \$3,213,311 | \$2,783,387 | \$3,911,983 |
| | Simmons School | \$2,575,094 | \$624,152 | \$1,692,958 | \$2,224,311 | \$905,952 | \$2,285,249 | \$3,035,071 |
| | SMU Libraries | \$156,244 | \$117,810 | \$220,572 | \$147,615 | \$156,095 | \$30,166,941 | \$7,070,836 |
| | Student Affairs | \$909,032 | \$682,812 | \$692,671 | \$923,087 | \$1,031,078 | \$1,614,189 | \$1,892,115 |
| Total for Operating | | \$53,738,845 | \$42,688,466 | \$57,187,497 | \$57,975,336 | \$48,161,954 | \$100,287,673 | \$100,148,203 |
| CAPITAL School/Unit | Athletics | \$9,590,753 | \$9,679,364 | \$9,668,763 | \$22,568,651 | \$15,781,416 | \$19,828,047 | \$20,522,595 |
| | Cox School | \$5,041,881 | \$4,672,761 | \$21,443,837 | \$67,454,196 | \$24,304,739 | \$26,823,843 | \$24,205,148 |
| | Dedman College | \$3,395,479 | \$3,315,302 | \$3,016,046 | \$3,448,917 | \$2,522,356 | \$3,139,606 | \$2,281,984 |
| | Dedman School of Law | \$3,734,075 | \$2,636,468 | \$7,070,871 | \$2,763,346 | \$2,353,524 | \$1,307,520 | \$4,011,721 |
| | General University | \$16,742,800 | \$10,612,980 | \$7,108,146 | \$10,439,280 | \$7,015,594 | \$13,671,800 | \$5,269,499 |
| | Lyle School | \$1,228,761 | \$12,651,553 | \$2,404,225 | \$5,272,164 | \$8,013,721 | \$8,506,999 | \$9,837,623 |
| | Meadows School of the Arts | \$6,176,061 | \$3,399,871 | \$7,775,217 | \$7,400,886 | \$7,921,842 | \$4,742,576 | \$15,652,436 |
| | Moody School | \$0 | \$23,000,000 | \$17,600,000 | \$15,000,000 | \$18,010,000 | \$6,950,000 | \$5,090,000 |
| | Perkins School | \$1,266,370 | \$3,209,097 | \$4,307,206 | \$853,810 | \$806,117 | \$1,369,056 | \$717,110 |
| | Simmons School | \$10,038,245 | \$25,000 | \$228,871 | \$170,000 | \$45,000 | \$20,000 | \$892,749 |
| | SMU Libraries | \$1,836,076 | \$1,466,992 | \$5,909,986 | \$697,475 | \$42,015 | \$11,611,647 | \$11,690,014 |
| | Student Affairs | \$1,083,125 | \$909,720 | \$1,140,281 | \$6,973,885 | \$1,031,049 | \$1,239,054 | \$590,484 |
| Total for Capital | | \$60,133,626 | \$75,579,108 | \$87,673,448 | \$143,042,609 | \$87,847,372 | \$99,210,149 | \$100,761,363 |
| TOTAL | | \$113,872,470 | \$118,267,574 | \$144,860,946 | \$201,017,945 | \$136,009,325 | \$199,497,822 | \$200,909,566 |

SOUTHERN METHODIST UNIVERSITY
SEVEN YEAR REVENUE COMPARISON REPORT BY SOURCE
As of 5/31/25

| | | FISCAL YEAR | | | | | | |
|---------------------|-----------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| | | 2018–2019 | 2019–2020 | 2020–2021 | 2021–2022 | 2022–2023 | 2023–2024 | 2024–2025 |
| OPERATING Source | Alumni | \$28,909,202 | \$15,567,785 | \$29,115,758 | \$17,528,540 | \$18,342,671 | \$61,474,300 | \$43,716,733 |
| | Non-Alumni Individual | \$6,518,414 | \$7,503,470 | \$5,669,716 | \$9,389,875 | \$7,373,352 | \$8,603,238 | \$10,420,444 |
| | Donor Advised Fund | \$3,259,748 | \$3,130,675 | \$5,839,019 | \$17,015,720 | \$4,922,372 | \$10,016,701 | \$16,038,360 |
| | Corporation | \$2,422,793 | \$2,123,997 | \$1,858,435 | \$2,428,010 | \$1,675,422 | \$1,645,243 | \$7,337,231 |
| | Foundations - Personal and Family | \$3,505,947 | \$4,213,332 | \$2,710,813 | \$3,955,275 | \$5,452,763 | \$9,297,811 | \$9,403,334 |
| | Foundations - Other | \$7,399,789 | \$8,780,400 | \$10,778,162 | \$6,025,828 | \$9,045,320 | \$8,070,783 | \$11,580,426 |
| | Other Organization | 1,722,952 | \$1,368,807 | \$1,215,596 | \$1,632,089 | \$1,350,054 | \$1,179,598 | \$1,651,676 |
| | Total for Operating | \$53,738,845 | \$42,688,466 | \$57,187,497 | \$57,975,336 | \$48,161,954 | \$100,287,673 | \$100,148,203 |
| CAPITAL Source | Alumni | \$25,046,251 | \$27,693,045 | \$38,974,125 | \$54,490,943 | \$36,292,648 | \$56,206,192 | \$46,800,164 |
| | Non-Alumni Individual | \$18,678,712 | \$10,420,265 | \$15,092,956 | \$44,928,164 | \$14,986,738 | \$16,553,692 | \$28,918,423 |
| | Donor Advised Fund | \$10,912,574 | \$7,532,654 | \$9,418,408 | \$22,367,646 | \$8,548,053 | \$9,653,226 | \$10,447,578 |
| | Corporation | \$2,309,595 | \$1,379,318 | \$643,140 | \$1,930,426 | \$1,445,701 | \$141,765 | \$35,638 |
| | Foundations - Personal and Family | \$2,147,000 | \$2,643,487 | \$1,003,460 | \$2,064,318 | \$5,143,433 | \$7,644,385 | \$7,335,100 |
| | Foundations - Other | \$585,001 | \$25,630,750 | \$20,596,050 | \$17,029,000 | \$21,050,000 | \$8,908,939 | \$7,115,973 |
| | Other Organization | \$454,493 | \$279,589 | \$1,945,309 | \$232,113 | \$380,800 | \$101,950 | \$108,486 |
| | Total for Capital | \$60,133,626 | \$75,579,108 | \$87,673,448 | \$143,042,609 | \$87,847,372 | \$99,210,149 | \$100,761,363 |
| TOTAL | | \$113,872,470 | \$118,267,574 | \$144,860,946 | \$201,017,945 | \$136,009,325 | \$199,497,822 | \$200,909,566 |

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Appendix A. Marts & Lundy Audit Summary Findings



December 16, 2015

Mr. Brad Cheves
Vice President for Development
and External Affairs
Southern Methodist University
P.O. Box 750281
Dallas, Texas 75275

Dear Brad:

The attached Post Campaign Review was undertaken by Marts & Lundy to analyze the unprecedented results of the *SMU Unbridled: The Second Century Campaign*. The value of this review will allow SMU to chronicle the successes and remaining opportunities in elevating an already high performing fundraising program that desires greater prominence. Strategic recommendations are made for programmatic and organizational enhancements for SMU so that it might build greater, sustainable fundraising capacity at an appropriate cost.

This assessment included 87 confidential interviews with SMU administrative and academic leaders, virtually all of the key members of the Development and External Affairs staff, all deans and a single Trustee who has been highly involved in the campaign process. In addition, the Marts & Lundy team carefully reviewed SMU campaign planning documents, collateral materials, organizational structures, fundraising reports and development officer metrics.

The perspective of this review is forward looking and strategically driven. Some positive aspects of the current SMU Development and External Affairs operation are not reported in detail for space reasons, but have been factored into our findings and recommendations.

This Executive Summary is submitted at the request of the Vice President for Development and External Affairs (VP/DEA) and is for dissemination at your discretion. It will focus on ten key recommendations that are most critical for your action, post campaign.

Ten Essential Areas of Focus in the Post Campaign Period

1. **Enhance the Organization, Identification and Solicitation of Principal Gift Prospects:**
Clearly, in light of the significant aspirations that SMU has in its sights, outright gifts of \$1 Million or more from individuals must become the dominant philanthropic force. Alumni, non-alumni friends and most especially parents must be identified in greater numbers than was possible in the Second Century Campaign. The evolution of this dominant donor market is consistent with national trends in higher education philanthropy.

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- a. Stewardship plans must be in place for those who gave \$1 Million or more in this campaign. This is the first step in securing future, personal commitments to the inevitable “next campaign” and the best way to ensure subsequent gifts.
 - b. Reorganize the Principal Gifts structure so that there is one leader who does not also have school based responsibilities.
 - c. Use standard higher education nomenclature where the word “principal” refers to SMU’s highest level prospects, generally with a rating of \$1 Million or more.
 - d. Expand the group responsible for principal gifts strategy to include deans and senior fundraisers from the schools and units. A principal gift is often as opportunistic as it is strategic. You never know when it will emerge as a possibility. Most gifts at this level, however, are the consequences of a deliberate strategic initiative.
 - e. DEA should undertake a detailed review of how principal gift officers actually spend their time, with the goal of ensuring that 80% is allocated to fundraising or directly related activities.
2. **Establish a \$1 Million Giving Society** to allow SMU to continually engage and involve its most important donors. The programming around this Society must be gracious, interesting and sometimes provocative. This group would be staffed by the new donor stewardship group.
3. **Retain no more than five direct reports to the VP/DEA** so that you are able to focus on the myriad of responsibilities that are unique to the way your position has evolved under President Turner. These encompass managing Trustee leadership, leading principal gifts solicitations and preparing for the next campaign effort. The five positions are outlined in the full post campaign review.
 - a. With principal gifts being a focal point, post campaign intensity needs to remain high by allocating 40-50% of your time to oversee this area in partnership with a new Principal Gifts Director.
 - b. You should maintain a prospect pool of no more than 100 individuals, all of whom carry a \$1 Million or above rating.
4. **Appoint an Ad Hoc Committee on Campaign Planning** comprised of trustees and former trustees, to begin thinking about the size, scope, timing and overall strategy for the next campaign. This committee should be appointed by the President, with you personally staffing it.
5. **Consolidate Endowment Giving (as a stewardship function) with Donor Relations** as a new Donor Stewardship group to be led by a Director of Donor Stewardship (replacing the departing Director of Donor Relations). Ensure strategic integration and consistency for all donor stewardship at SMU.
6. **Implement an on-going professional development and training program** to sharpen the skills of gift officers and to increase their job satisfaction. M&L professionals, well versed in this area, can guide SMU in how to build a comprehensive program.

7. Focus on the reorganization of a comprehensive annual fund that will include both a Parents Fund and Reunion Giving. Counsel sees no conflict in having Alumni Relations and the Annual Fund as complimentary programs under supervision of a single director.
8. Build a model for alumni engagement and develop metrics and the data to gauge success in this area. M&L will work with you to find best practices in measuring alumni programming effectiveness.
9. Disaggregate Development Communications from the on-going public affairs programming. The team should have a direct line reporting relationship within central Development. It is important to have a group totally focused on producing fundraising related materials for use in solicitation, stewardship programs and increasing visibility of major gifts received.
10. Retain present Development/External Affairs funding with an eye toward increasing it incrementally over the coming years prior to the initiation of the next campaign. Work with SMU's chief financial officer to find common ground using a Return on Investment approach. DEA must be accountable to achieve agreed upon returns. Work with Counsel to explore funding options that can be presented to the President and the Board of Trustees.

SMU has created a highly successful fundraising program that aspires to even greater heights. The results of *The Second Century Campaign* attest to these aspirations. SMU and its Development and External Affairs program now have the structure and leadership to pursue philanthropy commensurate with the boldness of its emerging strategic priorities.

We know for certain that SMU has a \$1 Billion fundraising program. Giving careful consideration to implementing these recommendations (described in greater detail in the attached Post Campaign Review) will assure that SMU is poised to become a \$2+ Billion fundraising program in the foreseeable future.

The Marts & Lundy team is honored that you entrusted it to help you prepare for a bright philanthropic future.

Sincerely,



Robert D. Sweeney
Of Counsel
Marts & Lundy

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Appendix B. Institutional Impact

Endowed Academic Positions: 37 created

Elisabeth Martin Armstrong Dean of Dedman College
The Harold M. Brierley Professor
Anne and Alan Bromberg Chair in Meadows School of the Arts
Herman Brown Chair in Mechanical Engineering
Andrew H. Chen Chair in Financial Investments Fund
Alessandra Comini Professorship in European Music History
Cox Family Professorship
Robert H. Dedman, Jr. Chairperson of the Department of Computer Science
Digital Innovation Initiative Professorship
Leighton K. Farrell Dean of Perkins School of Theology
David Gergen Director of the Center for Presidential History
Sterling R.E. Havens Professorship of Creative Writing Fiction
Mary Elizabeth Holdsworth Professorship
Associate Director, Hunt Scholars Program
Judge Elmo B. Hunter Legal Center Staff Attorney
Lyle School of Engineering Professorship in Human-Augmented Innovation
Kairo Directorship for the Center for Faith and Learning
J. Stephen Lockton Chair of Economics
William F. May Director of the Cary M. Maguire Center for Ethics and Public Responsibility
Meadows Museum Director of Education
Dean of the Moody School of Graduate and Advanced Studies
Peter O'Donnell, Jr. Director of the O'Donnell Data Science and Research Computing Institute
O'Donnell Data Science and Research Computing Institute Professorships (6)
O'Donnell Data Science and Research Computing Institute Associate Director
Vin and Caren Prothro Chairperson of the Department of Electrical and Computer Engineering
Walden and Paula Rhines Quantum Informatics Professorship
Mark A. Roglán Director of the Custard Institute for Spanish Art and Culture
G. Marlyne Sexton Director of Musical Theatre
William T. Solomon Chairperson of the Department of Mechanical Engineering
Claire Morris Spaht Chair
Executive Director of the Spears Institute for Entrepreneurial Leadership
Mary and Richard Templeton Dean of Lyle School of Engineering

Academic Programs: 66 created

Addy Foundation Center on Research and Evaluation
AT&T Center for Virtualization
Michael Aurbach Division of Art Fund
Belle and Donald Berg Research Excellence Fund
Brierley Institute for Customer Engagement
Anne and Alan Bromberg Endowed Meadows Museum Fund

James E. Bruseth and Toni S. Turner Fund for Archaeological Research
 Jerry Capps Mustang Excellence Fund
 Gail and Robert Clark Faculty Research Scholars Fund
 Dean Jennifer M. Collins Women's Leadership Initiative Fund
 Custard Institute for Spanish Art and Culture at the Meadows Museum
 Professor Harvey L. Davis and Chief Justice Clarence Guittard ABA Moot Court
 Competition
 Ann and JD Dell Fund for Human Rights
 DuPont Family World Language Academic Fund
 Embrey Human Rights Program Excellence Fund
 Embrey Human Rights Program Endowment Fund
 Gayle David Fogelson Fund for Dedman College of Humanities and Sciences
 Lt. Col. And Mrs. Lynn B. Harding Fund for Women's Golf
 Hart Center for Engineering Leadership
 Linda and Mitch Hart Institute for Technology, Innovation and Entrepreneurship
 Carolyn and Barksdale Hortenstine Endowment for the Robert B. Rowling Center for
 Business Law
 Huff Family Cox School Excellence Fund
 Nancy Ann and Ray L. Hunt Leadership Scholars Program Endowment Fund
 Harold B. Krom Fund
 J. Stephen Lockton Athletics Fund
 Leslie and Ryan Long Fund
 Spears Institute for Entrepreneurial Leadership
 Bobby B. Lyle Accelerating Emerging Research Fund
 Bobby B. Lyle Accelerating High-Tech Business Innovations Fund
 Malik Family Fund
 Masterson Family Business Excellence Fund
 Kyle D. Miller Energy Management Program Fund
 Miller Campus Center Maintenance Fund
 Mission Foods Texas-Mexico Center Endowed Fund
 James T. and Wynona L. Mobley Fund for Life After Ball
 Moody Academic Leadership Fund
 Moody Faculty Fellowship Fund
 Moody Research Incubator Fund
 NCAA Academic Student Support Fund
 O'Donnell Data Science and Research Computing Institute Faculty Research
 Acceleration Fund
 Ambassador Jeanne L. Phillips Fund for Global Education
 Jerry Pittman Endowment for SMU Men's Golf Head Coach
 Pratt Family Excellence Fund
 Pronger Family Excellence Fund
 Jerry Ann Rainey Putt Human Rights Excellence Fund
 Roark Reed Memorial Fund for the Criminal Justice Clinic
 Rees-Jones Library of the American West Fund
 Betty Regard Human Rights Program Fund
 Rider Family Fund

Robert B. Rowling Center for Business Law and Leadership
G. Marlyne Sexton Institute for Musical Theatre
Dr. Dennis Simon Civil Rights Pilgrimage Fund
Payne Stewart Cup Fund
Still Water Foundation Excellence Fund for the Bridwell Institute for Economic Freedom
Kathryn and Lynn Surls Cox School of Business Fund
Mary and Richard Templeton Engineering Leadership Fund
Templeton Research Excellence Fund
Terlato Family Excellence Fund
Velvin Family Program Support Fund
Mary Vernon Painting Prize Fund
Warsop Family President's Scholar Fund
James Wheat, M.D. Endowment Fund
Mary Longgear Wheat Endowment Fund
Sheldon Paul Wheat Endowment Fund
Col. Dan J. Wittliff and Manda L. Rash Engineering Leadership and Professional Development
Stephen and Barbara Doran Young Family Endowed Fund

Endowed Scholarships: 615 created through 189 scholarship programs/funds

Altschuler-Kulas Scholarship
David J. Anderson MBA Scholarship
Robin and Norm Bagwell Family Cox Community BBA Scholarship
Susan and James Baldwin Law Scholarship
Bandera Ventures MBA Scholarship
Peter and Sarah Bates Scholarship
Howard and Sally Baulch Scholarship
Tracey and Van Beckwith Scholarship
William K. Berenson Scholarship
Frances Heard Billups Scholarship
Kathryne and Gene Bishop Scholarship
Blabey Family BBA Scholars
Bland Family BBA Scholarship
Edward S. and Patricia J. Blythe Scholarship
Stacy Hinds Bolduc '86 Scholarship
Bridge & Armour Scholarship
Diane and Hal Brierley Scholarship for the Meadows School of the Arts
Brizius Family Scholarship
Lucille Alexander Broach Dedman College Scholars
Anne and Alan Bromberg Meadows School Scholarship
Anne and Alan Bromberg Dedman Law Scholarship
Brookshire SMU/Tyler Junior College Transfer Scholarship
Corinne and William J. Bryan III Scholarship
Build a Bridge Scholarship
Burke Family Scholarship
Prentiss and Helen Burt Scholarship

Carolyn Fulgham Butcher and Preston Butcher Family Excellence Scholarship
Butler-VanderLinden Family Scholarship
Kimberly and Jim Caccavo Family Scholarship
Thomas and Kimberly Carter Family Scholarship
Brad E. Cheves SMU-in-Taos Scholarship
Brad E. Cheves Tower Scholars Program
H. Wade Choate Mustang Band Scholarship
Class of 1970 Dedman College Scholars
Codd Family BBA Scholars
Alessandra Comini International Fellowship for Art History Studies
Christine and Chris Cook BBA Scholars
William R. Cooper BBA Scholars
Corrigan Family Holdings MBA Scholarship
Wayne & Lucile Tracey Curtis Scholarship
David Cush Dedman College Scholars
Cush Family Meadows Scholar
Emily Snodgrass Davidson Scholarship
Dedman Scholarship Endowment
Reverend Marilyn Dickson Scholarship
Digital Innovation Initiative Fellowship
Thomas DiPiero Dedman College Scholars
Lillian and Tony Dona MBA Scholarship
Don Donnally Scholarship
Michael Duda MBA Scholarship
Dunleavy Family Business Scholarship
Jeff and Pam Ellerman MBA Scholarship
Charles R. Emrich Scholarship
Errico Family BBA Scholarship
Linda Perryman Evans Meadows Scholars
Leighton K. Farrell Scholarship
Roswell LuGar Finlay Engineering Scholarship
Flather Family Scholarship
Randall S. Fojtasek '85, '90 and Olamaie G. Fojtasek Family MBA Scholarship
Thomas B. Fomby Graduate Award of Excellence
Carole and Gene Francis Scholarship
Dr. Herbert Gambrell Memorial Scholarship
Gaudin Family Dedman College Scholars
Allison and Tog George Dedman College Scholars
Judith W. and James A. Gibbs Student Scholarship
Marguerite Edwards Gipson Scholarship
Dr. Henry L. Gray Scholarship for Dedman College
Puneet and Richa Gupta Family Scholarship
Milledge A. Hart, III Scholarship for Veterans of The United States Marine Corps
Annette M. Havens Scholarship
Richard V. Helgason Scholarship in Computer Science
Ima Honaker Herron Scholarship

Dr. James H. Hinderer Memorial Scholarship
 Jim and Doris Hodges Scholarship
 Hohlt Family Scholarship
 B.R. and Denny Holman Real Estate Scholarship
 Diana Slaughter Horan and Timothy Horan, Jr. Scholarship
 Katy and Don Houseman MBA Scholarship
 Laura G. Howard Scholarship
 HPI Real Estate MBA Scholarship
 Robert W. Hsueh Business Scholarship
 Tracey Nash-Huntley and David Huntley Centennial Scholarship in the Dedman School
 of Law
 David S. Huntley and Tracey Nash-Huntley Dedman College Scholarship
 David S. Huntley and Tracey Nash-Huntley Scholarship
 Ingram Family Mustang Scholarship
 Interfraternity Council Leadership Scholarship
 Jeanne R. Johnson Scholarship
 Scott and Kristine Johnson Scholarship
 William and Lynda Foster Johnson Scholarship
 Hon. Sam Johnson Military Scholarship
 Julie Ann Jones Memorial Scholarship Endowment
 Skaria S. & Rachel S. Kalluvilayil MBA Scholarship
 Dr. David A. Karp Piano Scholarship
 T. Mark Kelly Scholarship
 Dr. Alireza Khotanzad Graduate Student Support
 Kisber Family Scholarship
 Kissire Family BBA Scholarship
 Kleinert Family Scholarship
 Melinda and Mike Lafitte MBA Scholarship
 Diny and Jim Landen BBA Scholars
 Lear Family Scholarship
 Venetia D.H. Lewis Scholarship
 Stephen W. Ley Scholarship
 Peter A. Lodwick Business Scholarship
 Londal Family Scholarship
 Chris A. Lorenzen Scholarship
 Tim and Denise Marshall Scholarship
 Juliann Weida McGinnis and Francis K. McGinnis, III Engineering Scholarship
 Bishop Michael McKee Perkins Scholars
 John Winn McKee Scholarship
 Kenneth E. and Marsha Scott Mifflin U.S. Military Scholarship
 David B. Miller BBA Scholars
 Katy A. and Kyle D. Miller Energy Management Scholarship
 Kyle D. Miller Energy Scholarship
 James T. and Wynona Mobley Graduate Scholarship
 James T. and Wynona Mobley for the Gerald and Gail Turner Scholars Program
 Moody Graduate Fellowship

Moody Ph.D. Dissertation Fellowship
Barbara Hill Moore Scholarship
Dawn and Steven Moore Dedman College Scholars
Timothy Lee Morrison Memorial Business Scholarship
Charles G. Northrup Scholarship
Alice and Erle Nye Law Centennial Scholarship
Bill O'Brien and Doug Hammond Memorial Scholarship
Opportunity SMU
Ami Patel Memorial Law Scholarship
Patterson Family Scholarship
Anne Spivey Paup Meadows Scholars
Henry B. "Hank" Paup Scholarship
Chad and Cari Peets Family Scholarship
Sarah F. Perot Meadows Scholar
Perry Family Scholarship
Charles Phillip Philbin Scholarship
Barbara Pierce Scholarship
Betsy and Rob Pitts Graduate Fellowship
Robert G. Pollock Meadows Scholars
Helen Gissler Powell Business Scholarship
William and Dewena Powell Law Scholarship
Stephen and Nicole Preston Dedman College Scholars
Terry D. Quinn Family MBA Scholarship
Joan Reisch and John Boddie Scholarship
Walden and Paula Rhines Ph.D. Fellowship
C. Paul Rogers Scholarship
ID and Lynn Russell Football
Rust Family Dedman Law Centennial Scholarship
Fatima Hassan-Salam and Junaid B. Salam Scholarship
Jack Frost Sanders Film Scholarship
Floyd and Burton Scheinman Scholarship
Schiltz Family Scholarship
Schmidly/Hurst Family Scholarship
Schmitz Family Scholarship
Suhagbanti Seekri MBA Scholarship
Noel Sewell President's Scholars
Walter Sheffield MBA Scholarship
Millette and A. Haag Sherman Mustang Scholars
Gay Nell and Henry Shiels Mustang Band Scholarship
Coach Eddie Sinnott Scholarship
B.K. Carter Sloan BBA '84 and Mark M. Sloan JD '90 Law Scholarship
Sean and Andrea Smith Opportunity Scholarship
SMU Guildhall Scholarship
Spaht Family Foundation Meadows Scholars
George Speranza Chemistry Scholarship
Payne Stewart Family Scholarship

Emily Rich Summers Meadows Scholars
Thear Sy Suzuki Scholarship
Eric and Janet Curtis Teddlie Scholarship
Templeton PhD Fellowship
Templeton Undergraduate Scholarship
Ira Terrell Athletic Scholarship
Nancy Lee and B.H. (Tim) Timmins for Global Education
Texas United Methodist College Association Scholarship
Thomas W. Tunks Graduate Music Education Scholarship
Gerald and Gail Turner Scholars Program
Rosemary Haggard Vaughan Meadows Scholars
Waldron Family Business Scholarship
James H. Wallenstein Centennial Scholarship in the Dedman School of Law
Warsop Family President's Scholar
Wendy Weber Smith Kappa Kappa Gamma Scholarship
Martha Hess Whitehead Scholarship
Harvey and Tracy Wiggins Engineering Scholarship
Donna Wilhelm Scholarship
Eleanor L Williams Scholarship
Meghan and Christopher Wilson Scholarship
Witz Family Business Scholarship
Susan and Tucker York Scholarship
Yort Family BBA Scholars
Stephen A. Youngman Memorial Scholarship
Robert L. Zollars Scholarship
Catherine Zollars, PhD and Robert Lee Zollars STEM Education Scholarship

Capital Projects: 25 created or renovated

Anonymous Hall (Cox)
Armstrong Field House, Miller Boulevard Club
Bolin-Bridwell Hall (Cox)
Clements Foundation Scholars Den Renovation
Joseph Wylie Fincher Memorial Building Renovation (Cox)
Hillcrest Parking Center
Hughes-Trigg Student Center Renovation
Gene and Jerry Jones Grand Atrium and Plaza (Meadows)
Cary M. Maguire Building renovation (Cox)
Meadows Visual Arts Facilities
Men's Basketball Locker Room Renovation
David B. Miller Business Quadrangle
Frances Anne Moody Hall
Rees-Jones Library of the American West
Robson & Lindley Aquatics Center
Robson & Lindley Aquatics Center Phase II, Holt Hickman Outdoor Pool
Nancy C. and Richard R. Rogers Center for Visual Arts

Shaddock Hall (Cox)
Sheffield Hall (Cox)
Styslenger/Altec Tennis Complex
SMU-in-Taos Dining Hall Renovation
Thomas House
Trammell Crow Building Renovation (Cox)
Washburne Soccer and Track Stadium
Garry Weber End Zone Complex



DEVELOPMENT & EXTERNAL AFFAIRS COMMITTEE, 2021-22
(Brad E. Cheves, Vice President)

TRUSTEE MEMBERS

JEANNE L. PHILLIPS '76, *CHAIR*
CAREN H. PROTHRO, *VICE CHAIR*

JENNIFER BURR ALTABEF '78, '81
MICHAEL M. BOONE '63, '67
TUCKER S. BRIDWELL '73, '74
KRISTIN WAGNER HENDERSON '85 (*ALUMNI BOARD CHAIR*)
SCOTT J. MCLEAN '78
FRANCES A. MOODY-DAHLBERG '92
CONNIE B. O'NEILL '77
SARAH FULLINWIDER PEROT '83
CARL SEWELL '66
RICHARD WARE '68

EMERITI TRUSTEE MEMBERS

LINDA PITTS CUSTARD '60, '99
GENE C. JONES

EX OFFICIO MEMBERS

ROBERT H. DEDMAN, JR. '80, '84, *CHAIR OF THE BOARD*
R. GERALD TURNER, *PRESIDENT*

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LIZ MARTIN ARMSTRONG '82
NANCY MCMILLIAN DEDMAN '50
WILLIAM J. HOWARD '00 (*MUSTANG CLUB PRESIDENT*)
LUCKETT ROBINSON '22 (*STUDENT REPRESENTATIVE*)
GEOFFREY SMALL '86 (*PARENT LEADERSHIP COUNCIL CO-CHAIR*)
NICOLE SMALL (*PARENT LEADERSHIP COUNCIL CO-CHAIR*)
AURÉLIE THIELE (*FACULTY REPRESENTATIVE*)
CHRISTINE WAKEMAN '10 (*PLANNED GIVING COUNCIL CHAIR*)

DEVELOPMENT & EXTERNAL AFFAIRS COMMITTEE, 2022-23
(Brad E. Cheves, Vice President)

TRUSTEE MEMBERS

JEANNE L. PHILLIPS '76, *CHAIR*
CAREN H. PROTHRO, *VICE CHAIR*

JENNIFER BURR ALTABEF '78, '81
MICHAEL M. BOONE '63, '67
TUCKER S. BRIDWELL '73, '74
KRISTIN WAGNER HENDERSON '85 (*ALUMNI BOARD CHAIR*)
SCOTT J. MCLEAN '78
FRANCES A. MOODY-DAHLBERG '92
CONNIE B. O'NEILL '77
SARAH FULLINWIDER PEROT '83
CARL SEWELL '66
RICHARD WARE '68

EMERITI TRUSTEE MEMBERS

LINDA PITTS CUSTARD '60, '99
GENE C. JONES

EX OFFICIO MEMBERS

DAVID B. MILLER '72, '73, *CHAIR OF THE BOARD*
R. GERALD TURNER, *PRESIDENT*

NON-TRUSTEE MEMBERS

LIZ MARTIN ARMSTRONG '82
NANCY MCMILLIAN DEDMAN '50
PIPER HOLDEN '23 (*STUDENT REPRESENTATIVE*)
JAMES LANDEN, JR. '10 (*MUSTANG CLUB PRESIDENT*)
BRIAN MODOFF (*PARENT LEADERSHIP COUNCIL CO-CHAIR*)
TERESA MODOFF (*PARENT LEADERSHIP COUNCIL CO-CHAIR*)
TIM ROSENDALE (*FACULTY REPRESENTATIVE*)
CHRISTINE WAKEMAN '10 (*PLANNED GIVING COUNCIL CHAIR*)

DEVELOPMENT & EXTERNAL AFFAIRS COMMITTEE, 2023-24
(Brad E. Cheves, Vice President)

TRUSTEE MEMBERS

JEANNE L. PHILLIPS '76, *CHAIR*
CAREN H. PROTHRO, *VICE CHAIR*

JENNIFER BURR ALTABEF '78, '81
MICHAEL M. BOONE '63, '67
TUCKER S. BRIDWELL '73, '74
SCOTT J. MCLEAN '78
FRANCES A. MOODY-DAHLBERG '92
CONNIE B. O'NEILL '77
SARAH FULLINWIDER PEROT '83
CARL SEWELL '66
RICHARD WARE '68
PHILIP WISE '78, '81 (*ALUMNI BOARD CHAIR*)

EMERITI TRUSTEE MEMBERS

LINDA PITTS CUSTARD '60, '99
GENE C. JONES

EX OFFICIO MEMBERS

DAVID B. MILLER '72, '73, *CHAIR OF THE BOARD*
R. GERALD TURNER, *PRESIDENT*

NON-TRUSTEE MEMBERS

TRYG AANENSON '24 (*STUDENT REPRESENTATIVE*)
LIZ MARTIN ARMSTRONG '82
NANCY MCMILLAN DEDMAN '50
ROB FRANK (*FACULTY REPRESENTATIVE*)
JAMES LANDEN, JR. '10 (*MUSTANG CLUB PRESIDENT*)
BRIAN MODOFF (*PARENT LEADERSHIP COUNCIL CO-CHAIR*)
TERESA MODOFF (*PARENT LEADERSHIP COUNCIL CO-CHAIR*)
CHRISTINE WAKEMAN '10 (*PLANNED GIVING COUNCIL CHAIR*)

DEVELOPMENT & EXTERNAL AFFAIRS COMMITTEE 2024-2025
(Brad E. Cheves, Senior Vice President for Development and External Affairs)

TRUSTEE MEMBERS

JEANNE L. PHILLIPS '76, *CHAIR*
TUCKER S. BRIDWELL '73, '74, *VICE CHAIR*

JENNIFER BURR ALTABEF '78, '81
MICHAEL M. BOONE '63, '67
FRANCES A. MOODY-DAHLBERG '92
CONNIE B. O'NEILL '77
SARAH FULLINWIDER PEROT '83
CARL SEWELL '66
RICHARD WARE '68
PHILIP WISE '78, '81 (*ALUMNI BOARD CHAIR*)

EMERITI TRUSTEE MEMBERS

LINDA PITTS CUSTARD '60, '99
GENE C. JONES

EX OFFICIO MEMBERS

DAVID B. MILLER '72, '73, *CHAIR OF THE BOARD*
R. GERALD TURNER, *PRESIDENT*

NON-TRUSTEE MEMBERS

LIZ MARTIN ARMSTRONG '82
NANCY MCMILLAN DEDMAN '50
CAROLINE HALL (*STUDENT REPRESENTATIVE*)
CATHERINE C. MASTERSON (*PARENT REPRESENTATIVE*)
GEORGE M. MASTERSON (*PARENT REPRESENTATIVE*)
MELODY MATTOX '91 (*MUSTANG CLUB PRESIDENT*)
DAN REYNOLDS (*FACULTY REPRESENTATIVE*)
CHRISTINE WAKEMAN '10 (*PLANNED GIVING COUNCIL CHAIR*)

Campaign Volunteer Roster

Campaign Leadership Council during the *SMU Ignited* Campaign

Michael M. Boone '63, '67, *Co-Chair*

Kelly Hoglund Compton '79, *Co-Chair*

Robert H. Dedman, Jr. '80, '84, *Co-Chair*

Gerald J. Ford '66, '69, *Convening Co-Chair*

Ray L. Hunt '65, *Co-Chair*

David B. Miller '72, '73, *Co-Chair*

Caren H. Prothro, *Co-Chair*

Carl Sewell '66, *Co-Chair*

Richard K. Templeton, *Co-Chair*

R. Gerald Turner, *President, Ex Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs*

SMU Ignited Campaign Steering Committees

National

Kelvin L. Beachum, Jr. '10, '12
Martin L. Flanagan '82, *Co-Chair*
Kristin Wagner Henderson '82
Scott A. Johnson '86
Steven J. Lindley '74
Scott J. McLean '78, *Co-Chair*
Jeanne L. Phillips '76, *Convening Co-Chair*
Richard Ware '68, *Co-Chair*
James J. White, Jr. '82
Royce E. (Ed) Wilson, Sr., *Co-Chair*

Edwin L. Cox School of Business

Stephen L. Arata '88
Pat S. Bolin '73
Tucker S. Bridwell '73, '74, *Convening Co-Chair*
Katherine Raymond Crow '94
Christopher W. Kleinert '88
Kyle D. Miller '01, *Co-Chair*
Matthew B. Myers, *Dean, Ex Officio*
Mark B. Plunkett '96, *Co-Chair*
Kirk L. Rimer '89, *Co-Chair*
William H. Vanderstraaten '82

Dedman College of Humanities and Sciences

Jon J. Altschuler '94, *Co-Chair*
Liz Martin Armstrong '82, *Co-Chair*
Nathan Balke, *Interim Dean, Ex Officio*
M. Scott Gray '90
Frederick B. Hegi, Jr. '66
William "Bubba" Hines '83
Ashlee Hunt Kleinert '88, *Co-Chair*
Jason A. Kulas '93
Betsy O'Brien Pitts '87
Gloria McCall Snead '93
R. Haynes Strader, Jr. '11
Myra Nicol Williams '63

Dedman School of Law

Jim Baldwin '86, *Co-Chair*
A. Shonn Evans Brown '95, '98
David Haley '86
Robert S. Hart '86
Albon O. Head, Jr. '68, '71

David S. Huntley '80, *Co-Chair*
Jason P. Nance, *Dean, Ex Officio*
D. Bobbitt Noel, Jr. '76
Clement H. Osimetha '95
Timothy E. Powers '80
Mark M. Sloan '90
Cynthia Hoff Trochu '88
Amy Abboud Ware '87, '90, *Co-Chair*
Angela C. Zambrano '97

Bobby B. Lyle School of Engineering

Donald Berg '70
Douglas R. Deason
Hilda C. Galvan, *Co-Chair*
Linda W. Hart '65
Milledge A. Hart, III
Nader Jalili, *Dean, Ex Officio*
Bobby B. Lyle '67, *Convening Co-Chair*
Angela Steffen Meyer, PhD, PE, '83, '85, '87
Dale A. Petroskey
Walden C. Rhines '75
Richard H. Schulze
Sogand Shoja
William T. Solomon '64
Michael G. Sullivan '85, '91, *Co-Chair*
Richard K. Templeton, *Co-Chair*
Robert F. Weiss, Jr.

Algur H. Meadows School of the Arts

Jennifer Burr Altabef '78, '81, *Co-Chair*
Linda Pitts Custard '60, '99
Doyle D. Glass '84, '88
Kelli Herd '83
Samuel S. Holland, *Dean, Ex Officio*
Todd M. Lemkin
Barbara Thomas Lemmon
Sarah Fullinwider Perot '83, *Co-Chair*
Martha Peak Rochelle '76
Peggy Higgins Sewell '72, *Co-Chair*
Marvin B. Singleton '89, *Co-Chair*

Joe and Lois Perkins School of Theology

Jane R. Bolin
Dodee Frost Crockett '03, *Co-Chair*
Joe Hardt, *Co-Chair*
Katherine Glaze Lyle '71, '73, '94

Hugo Magallanes, *Dean ad interim, Ex Officio*
Charles R. Millikan '71
Gay F. Solomon
Julie Yarbrough, *Co-Chair*

Annette Caldwell Simmons School of Education and Human Development

Lottye Brodsky-Lyle
Calvert S. Collins-Bratton
Richard H. Collins '69, *Co-Chair*
Regen Horchow
George W. Killebrew, IV '85
Stephanie L. Knight, *Dean, Ex Officio*
Biegel Macaraeg '05
Connie Blass O'Neill '77, *Co-Chair*
Jeanne L. Phillips '76
Carol Paris Seay '66, '71
Connie M. Sigel '85
Philip J. Wise '78, '81
M. Catherine Zollars

Athletics

Kathryn Hedges Arata '87, '91
William D. Armstrong '82, *Co-Chair*
R. Steve Folsom '81
Damon Evans, *Director of Athletics, Ex Officio*
Kristin Wagner Henderson '82
William J. Howard '00
James E. Landen, Jr. '10
Melody L. Mattox '91
Bruce A. Robson '74, *Co-Chair*
Thomas W. Sabin, Jr. '79

Ex officio members of all Campaign Steering Committees

R. Gerald Turner, *President*
Brad E. Cheves, *Senior Vice President for Development and External Affairs*

The following reports by the Campaign Steering Committees are based on their final report to the Campaign Executive Committee on May 2, 2025. The final financial total for each Campaign Steering Committee is dated May 31, 2025, the final day of Campaign accounting.

National Campaign Steering Committee Summary Outcomes

Campaign Steering Committee Members:

Kelvin L. Beachum, Jr. '10, '12
 Martin L. Flanagan '82, *Co-Chair*
 Kristin Wagner Henderson '82
 Scott A. Johnson '86
 Steven J. Lindley '74
 Scott J. McLean '78, *Co-Chair*
 Jeanne L. Phillips '76, *Convening Co-Chair*
 Richard Ware '68, *Co-Chair*
 James J. White, Jr. '82
 Royce E. (Ed) Wilson, Sr., *Co-Chair*
 R. Gerald Turner, *President, Ex-Officio*
 Brad E. Cheves, Sr. *VP for DEA, Ex-Officio*

DEA Staff Liaison: Blake Davis, Vice President for Principal and Major Gifts

National Summary of Campaign Financial Results:

| Region | Total Commitments | Count of Principal and Major Gifts within Campaign Total |
|-----------------|--------------------------|---|
| Dallas | \$1,037,890,276 | 1,002 |
| Houston | \$165,113,921 | 113 |
| Remaining Texas | \$113,960,217 | 169 |
| Non-Texas | \$339,235,673 | 500 |
| Total | \$1,656,200,087 | 1,784 |

Top States for total donor activity

California
 New York
 Florida
 Illinois
 Georgia

ACC cities donor rates increasing:

Boston
 Miami
 Atlanta
 Bay Area

National Events

Send-off Parties

Regional Kickoffs (Los Angeles, Houston, New York)

Alumni chapter and tailgates

ACC away games VIP events and tailgates

Non-Texas Donors at Principal Gift Level – The following donors committed a cumulative \$1,000,000 or more to the Campaign:

| State/Country | Donor Name |
|---------------|--|
| 1. AR | Jennifer Tucker Clyde '85 and R. Andrew Clyde '85 and Murphy USA |
| 2. AZ | Morris Foundation |
| 3. CA | Anonymous |
| 4. CA | Carolyn Fulgham Butcher '62 and Preston Butcher * |
| 5. CA | Carter B. Ewing and Sarah A. Ewing |
| 6. CA | David R. Grieve '84 and Kathleen M. Grieve |
| 7. CA | Fay C. O'Neil '55 and William J. O'Neil '55 † and WJO Foundation |
| 8. CA | James H. Sharp '51, '74, '78, '87 † and Noriko Sharp † |
| 9. CA | David J. Shimmon, Sr. and Mary Beth Shimmon |
| 10. CA | Claire Morris Spaht '94 and Spaht Family Foundation |
| 11. CA | The William and Flora Hewlett Foundation |
| 12. CO | Lynda Foster Johnson '63 and William P. Johnson |
| 13. CO | Warren G. Lichtenstein |
| 14. CO | J. Stephen Lockton '89 and Steve Lockton Family Foundation * |
| 15. CO | Jennifer Overstreet Styslinger '86 and Mark J. Styslinger '87 |
| 16. FL | Juliann Benson and Richard A. Heise and Old Willow Farm LLC |
| 17. FL | Daniel M. Doyle, Jr. and Nicole Kudelko Doyle '94 |
| 18. FL | Jennifer A. Fox and Larry J. Fox |
| 19. FL | Katherine E. Georgas and William J. Georgas |
| 20. FL | Bert A. Getz, Jr. '89 and Susan Getz and Globe Foundation |
| 21. FL | Kristine S. Johnson and Scott A. Johnson '86 * |
| 22. FL | Amy Phelan and John C. Phelan '86 |
| 23. FL | Jerry W. Pittman '58 |
| 24. FL | Robert G. Skinner |
| 25. FL | John C. Thomas '88 and Wendy Thomas |
| 26. GA | Jennifer Gelety Flanagan '82 and Martin L. Flanagan '82 |
| 27. IL | Richter Memorial Funds Master Code, Bank of America, N.A., Trustee |
| 28. IL | Trott Family Philanthropies, Inc. |
| 29. IN | Lilly Endowment, Inc. |
| 30. IN | G. Marlyne Sexton and Family |
| 31. LA | G. William Jernigan '61 |
| 32. MA | Anonymous |
| 33. MA | The Stanton Foundation |

| | |
|---------|---|
| 34. MD | Anonymous |
| 35. MD | Peter J. Bates '96 and Sarah Riley Bates '96 |
| 36. MN | Karl F. Veith '74 |
| 37. MO | Anonymous |
| 38. NC | A. Wellford Tabor and Ann V. Tabor |
| 39. NJ | The United Methodist Church General Commission on Archives and History |
| 40. NY | Bloomberg Philanthropies |
| 41. NY | Anonymous |
| 42. NY | A. Taylor Nance '54, '57 † and Estate of Allan Taylor Nance |
| 43. NY | Mellon Foundation |
| 44. ROC | Anonymous |
| 45. SC | Danny O. Crew |
| 46. TN | John R. Ingram and Stephanie H. Ingram |
| 47. TN | United Methodist Church General Board of Higher Education and Ministry |
| 48. TN | Robert A. Wilson '67 and Susan Cooper Wilson '67 and The Robert A. and Susan C. Wilson Foundation |
| 49. VA | Charles Koch Foundation |
| 50. VA | Glenn A. Youngkin and Suzanne Schulze Youngkin '89 |

Cox Campaign Steering Committee Summary Outcomes

Campaign Steering Committee Members:

Stephen L. Arata '88

Pat S. Bolin '73

Tucker S. Bridwell '73, '74, *Convening Co-Chair*

Katherine Raymond Crow '94

Christopher W. Kleinert '88

Kyle D. Miller '01, *Co-Chair*

Matthew B. Myers, *Dean, Ex Officio*

Mark B. Plunkett '96, *Co-Chair*

Kirk L. Rimer '89, *Co-Chair*

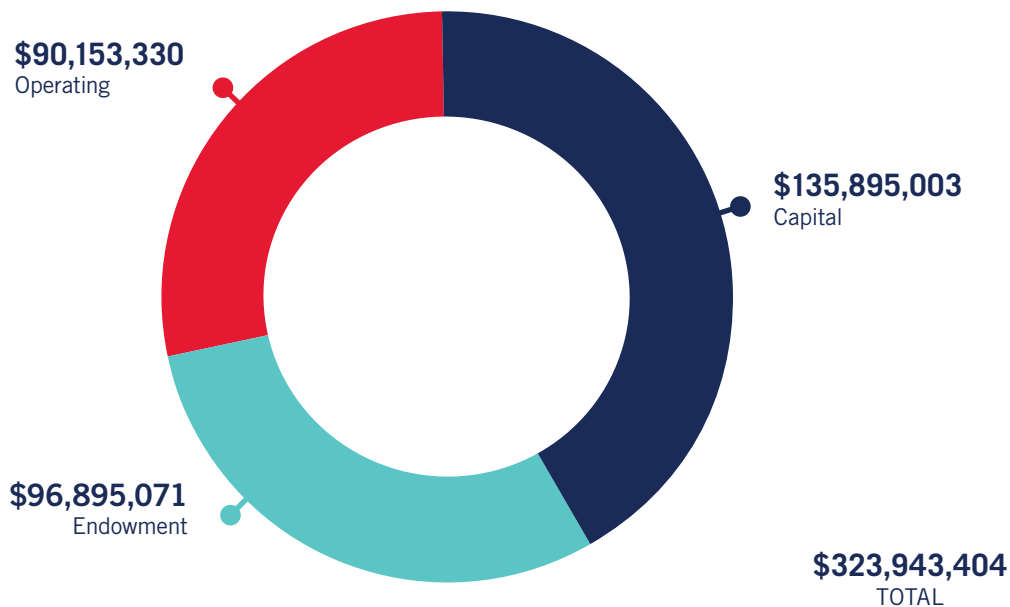
William H. Vanderstraaten '82

R. Gerald Turner, *President, Ex-Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Matt Myers, Cox School of Business Tolleson Chair of Business Leadership and David B. Miller Endowed Professor of Business

DEA Staff Liaison: Ashley Pitts, Director of Development, Cox



Campaign Highlights

- From 2017 – 2024 - Conceptualized, designed and opened the David B. Miller Business Quadrangle

Raised \$135.8M towards the Cox renovation and expansion project

October 2019 – Received \$50M donation from Carolyn and David B. Miller with \$25M towards the Cox renovation and expansion project and \$25M towards scholarships. To date, largest gift from alumni in school history.

May 2022 - Broke ground on the Cox renovation and expansion project

May and August 2024 – Dedicated the building in May 2024 and opened for classes in August 2024

- In 2022, Mimi and Bill Vanderstraaten donated \$1M to launch the Cox Real Estate Impact Investment Fund as part of the Folsom Institute for Real Estate
- In 2022, William S. Spears made largest gift by a non-alumnus in school history, to create William S. Spears Institute for Entrepreneurial Leadership
- In 2020, Gina L. and Tucker S. Bridwell donated \$15M to re-name the William J. O'Neill Center for Global Market and Freedom to the new Bridwell Institute for Economic Freedom and to name Bolin-Bridwell Hall in the newly renovated and expanded Cox School of Business
- In 2017, Tucker Bridwell led a consortium of donors to donate over \$5M to honor SMU alumnus and energy industry leader to create the Kyle D. Miller Energy Management Program in the Maguire Energy Institute
- In 2017, Professor *Emeriti* Andrew Chen donated \$2M to create The Andrew H. Chen Endowed Chair in Financial Investments Fund
- In 2016, Diane and Hal Brierley donated \$10M to create The Brierley Institute for Customer Engagement, the first academic institute to the study of customer engagement
- Cox created 114 new endowed scholarships supporting both MBA and BBA scholarships
- Cox created 3 new endowed academic positions

Dedman College Campaign Steering Committee Summary Outcomes

Campaign Steering Committee Members:

Jon J. Altschuler '94, *Co-Chair*

Liz Martin Armstrong '82, *Co-Chair*

Nathan Balke, *Interim Dean, Ex Officio*

M. Scott Gray '90

Frederick B. Hegi, Jr. '66

William "Bubba" Hines '83

Ashlee Hunt Kleinert '88, *Co-Chair*

Jason A. Kulas '93

Betsy O'Brien Pitts '87

Gloria McCall Snead '93

R. Haynes Strader, Jr. '11

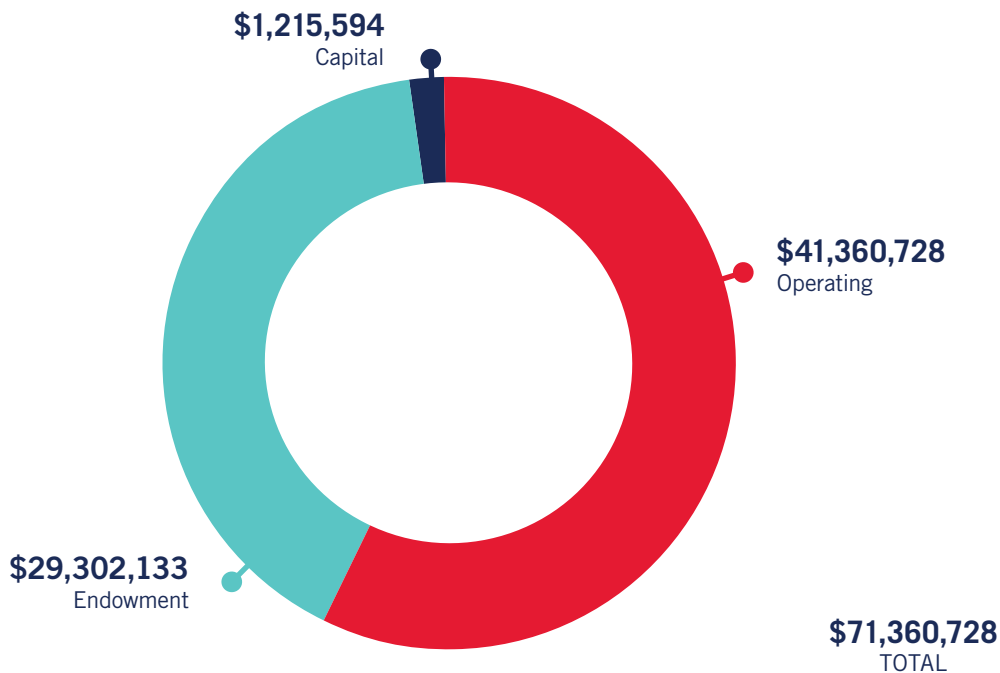
Myra Nicol Williams '63

R. Gerald Turner, *President, Ex-Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Nathan Balke, Elisabeth Martin Armstrong Dean *ad interim*

DEA Staff Liaison: Shivangi Perkins, Director of Development, Dedman College



Campaign Highlights

- Number of new endowed scholarships-30
- Number of new endowed academic positions-4

Campaign Impact

- Established the Elisabeth Martin Armstrong Dean of Dedman College of Humanities and Sciences.
- Integrated the Dallas Institute of Humanities and Culture at SMU into Dedman College
- Partnered with GRUMA Corporation to launch the Mission Foods Texas-Mexico Center
- Created the David Gergen Director of the Center for Presidential History Endowment Fund
- Established the Sterling R.E. Havens Endowed Professorship of Creative Writing
- Endowed the J. Stephen Lockton Chair of Economics
- Supported renovations for the Best/Meyerson Ancient DNA Laboratory in the Department of Anthropology
- Through the Dean's Research Council, 53 research grants awarded since the program's inception—providing over \$1.14 million in seed funding that has generated more than \$22 million in external research support. That's a 20:1 return on investment over five years.
- The Dedman College Scholars Program currently supports a total of 94 students.
- In 2024 alone, Dedman College invested \$3.5 million in startup funds to support 17 new tenure-track faculty hires. An additional 13 tenure-track searches are currently underway for the upcoming academic year.

College and Faculty Updates

- Dr. Janarthanan Jayawickramarajah will join SMU as the Elisabeth Martin Armstrong Dean of Dedman College of Humanities and Sciences in June 2025.
- Dr. Eric G. Bing, Professor in the Department of Anthropology, has been appointed Co-Director of SMU's Technology Enhanced Immersive Learning (TEIL) Center.
- Dr. David Meltzer, Henderson-Morrison Professor of Prehistory and Executive Director of the Quest Archaeological Research Program in Anthropology, was awarded the 2025 Faculty Career Achievement Award.
- In December 2024, Human Rights Educators USA (HRE USA) named Dr. Rick Halperin, Director of SMU's Human Rights Program, the recipient of the 2024 O'Brien Award for Human Rights Education.

Principal and Major Gifts (\$100K+) as of March 2025 for *SMU Ignited* Campaign

(Donors contributing to priority funding areas and initiatives for the college are listed below.)

| Area of Support | Donor Names |
|--|--|
| The Elisabeth Martin Armstrong Endowed Dean of Dedman College of Humanities and Sciences | Liz and Bill Armstrong |
| The David Gergen Director of the Center for Presidential History Endowment Fund | Linda W. and Mitch Hart |
| The Sterling R.E. Havens Endowed Professorship of Creative Writing Fiction | Cindy and Paul Havens |
| J. Stephen Lockton Chair of Economics | J. Stephen Lockton '86 and Steve Lockton Family Foundation |
| Dedman College of Humanities and Science General Fund | <ul style="list-style-type: none"> • Anonymous • William R. Bond • Gayle David Fogelson Endowment for Dedman College of Humanities and Sciences Fund • Marsh Terry Endowed Dallas Hall Classroom Maintenance Fund |
| Human Rights Program | <ul style="list-style-type: none"> • Anonymous • Lindsay and George Billingsley • Kathryn C. and Phillip G. Clayton • The Ann and JD Dell Endowed Fund for Human Rights • Michael and Cheryl Disque • Ashlee and Chris Kleinert • Scott Gray, Duane Minix and Wade Knight • Betty Regard • Sabre Passport to Freedom Scholarship Fund • Benjamin D. and Deanna D. Velvin |
| Deans Research Council | <ul style="list-style-type: none"> • David Cush • Dean Rider and Children's Brain Diseases Foundation • Myra Nicol and Van Zandt Williams |
| Faculty Research | <ul style="list-style-type: none"> • The Gail and Robert Clark Endowed Faculty Research Scholars Fund • Myra Nicol and Van Zandt Williams |
| Undergraduate Scholarships | <ul style="list-style-type: none"> • Anonymous • Benton Family Annual Scholars • The Dr. Herbert Gambrell Endowed Memorial Scholarship Fund • The Joan Reisch and John Boddie Endowed Scholarship Fund • The Kisber Family Endowed Scholarship Fund |

| | |
|-------------------------|--|
| | <ul style="list-style-type: none"> • Iva P. Speranza (The George Speranza Endowed Chemistry Scholarship Fund) • Janet Teddlie (Wayne & Lucile Tracey Curtis Scholarship & Eric & Janet Curtis Teddlie Scholarship) • Karl V. Mendel Endowed Scholarship in History • ORIX USA Corp (McFarland Memorial Scholarship for SMU-In-Japan KGU Program) |
| Dedman College Scholars | <ul style="list-style-type: none"> • Anonymous (5) • Lori and Jon Altschuler (The Altschuler-Kulas Endowed Dedman College Scholars Fund) • The Nancy Crow Sanders Endowed Dedman College Scholars Fund • David Cush (The David Cush Endowed Dedman College Scholars Fund) • The Tom DiPiero Dedman College Scholars Fund • Lucy E. Donahue • Scott Gray, Duane Minix and Wade Knight • Sue and Crawford Hamilton • The David S. Huntley and Tracey Nash-Huntley Endowed Dedman College Scholarship Fund • Ashlee and Chris Kleinert • Amy and Jason Kulas • The Lear Family Endowed Scholarship Fund • Kristal and John McGrath • The Dawn and Steven Moore Endowed Dedman College Scholars Fund • Mary Kathryn Navab • The Stephen and Nicole Preston Endowed Dedman College Scholars Fund • Lysa and Robert Richey • Peggy and Carl Sewell • Allen Sweet (The Class of 1970 Endowed Dedman College Scholars Fund) |

Dedman School of Law Campaign Steering Committee Summary Outcomes

Campaign Steering Committee Members:

Jim Baldwin '86, *Co-Chair*

A. Shonn Evans Brown '95, '98

David Haley '86

Robert S. Hart '86

Albon O. Head, Jr. '68, '71

David S. Huntley '80, *Co-Chair*

Jason P. Nance, *Dean, Ex Officio*

D. Bobbitt Noel, Jr. '76

Clement H. Osimetha '95

Timothy E. Powers '80

Mark M. Sloan '90

Cynthia Hoff Trochu '88

Amy Abboud Ware '87, '90, *Co-Chair*

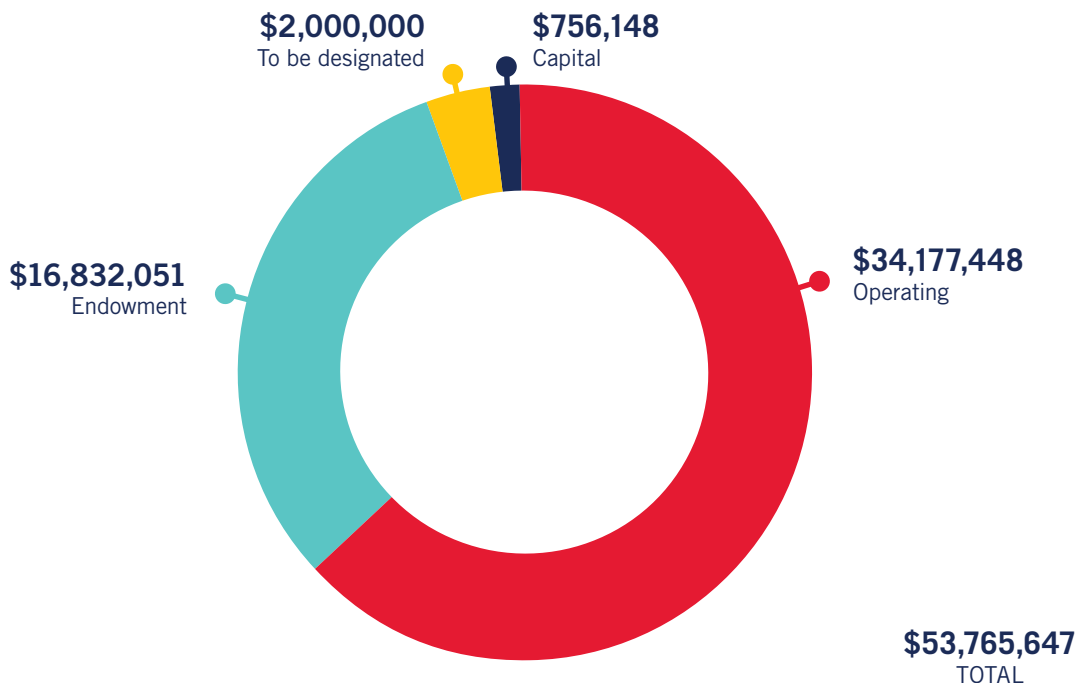
Angela C. Zambrano '97

R. Gerald Turner, *President, Ex-Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Jason Nance, Judge James Noel Dean and Professor of Law

DEA Staff Liaison: Clayton Ellis, Director of Development, Dedman Law



Campaign Highlights

- Number of new endowed scholarships: 58
- Number of new endowed academic positions: 1

Campaign Impact

- Celebrated the Centennial of the Law School which resulted in an increase in constituent engagement, a rebranding of the law school logo, and a strategic plan for student support and a comprehensive facility renovation.
- Established the Dedman Centennial Matching Gift Program creating 19 new endowed scholarships with 23 partners.
- Performed a feasibility, programming, and design study for a comprehensive study renovation of the law school campus, securing four gifts in the quiet phase.
- Created the Robert B. Rowling Center for Business Law and Leadership.
- Fully funded and established the Tsai Center for Law, Science and Innovation.
- Established the Dean Jennifer M. Collins Endowed Women's Leadership Initiative Fund.
- Renovated and renamed the faculty reading lounge to the Professor Regis Campfield Faculty Reading Room.
- Expansion of our interview room space through the renovation and naming of the Stefani S. Eisenstat Interview Room.
- Increased our national law school ranking in the *US News and World Report* 15 spots in three years to #43.
- Dramatically increased our scholarship packages for prospective and incoming students resulting in retaining the highest credentialed class in the history of the law school consecutively for the last four years.
- Expansion of our Legal Clinic program through the creation of the First Amendment Clinic.
- Established the first online program for the law school, Master of Legal Studies, launching in the Fall of 2025.

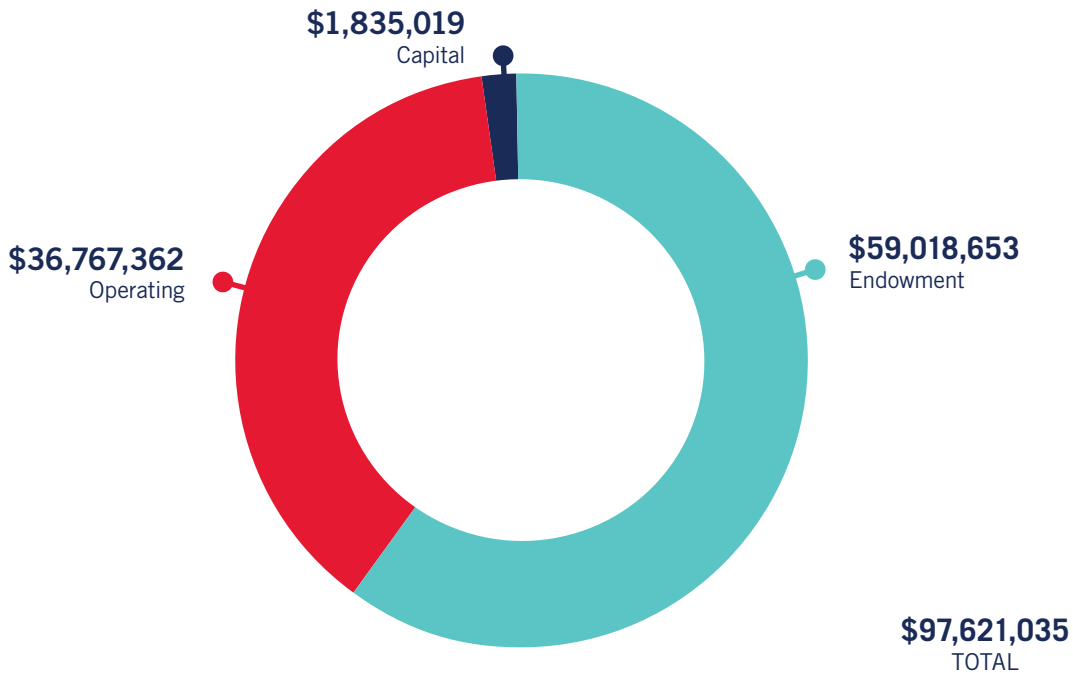
Lyle Engineering Campaign Steering Committee Summary Outcomes

Campaign Steering Committee Members:

Donald Berg '70
Douglas R. Deason
Hilda C. Galvan, *Co-Chair*
Linda W. Hart '65
Milledge A. Hart, III
Nader Jalili, *Dean, Ex Officio*
Bobby B. Lyle '67, *Convening Co-Chair*
Angela Steffen Meyer, PhD, PE, '83, '85, '87
Dale A. Petroskey
Walden C. Rhines '75
Richard H. Schulze
Sogand Shoja
William T. Solomon '64
Michael G. Sullivan '85, '91, *Co-Chair*
Richard K. Templeton, *Co-Chair*
Robert F. Weiss, Jr.
R. Gerald Turner, *President, Ex-Officio*
Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Nader Jalili, Mary and Richard Templeton Dean

DEA Staff Liaison: Maya Jhangiani, Director of Development, Lyle



Campaign Highlights

- Number of new endowed scholarships: 43
- Number of new endowed academic positions: 10

Campaign Impact

- Establishment of the Center for Digital and Human-Augmented Manufacturing
- Establishment of Energy Storage and Battery initiatives
- Expansion of Thrive STEM Camps
- Renovation of the first floor of Embrey
- Additional funding for Cybersecurity and Innovation efforts
- Hiring of 20 new faculty members, including five research professors
- Ongoing hiring of 6-8 new faculty members
- Multiple undergraduate and research lab renovations in Embrey and Junkins, including a new location for The Hart Institute for Technology, Innovation, and Entrepreneurship
- Expansion of the Darwin Deason Institute for Cybersecurity, including a computational space for the new CAR and graduate student workspace

Lyle Principal Campaign Gifts- \$1M+

- Mr. Richard K. Templeton and Mrs. Mary Templeton
- O'Donnell Foundation
- Mrs. Noriko B. Sharp
- Hamon Charitable Foundation
- Ms. Linda W. Hart and Mr. Milledge A. Hart, III
- Walden C. Rhines, Ph.D. and Mrs. Paula H. Rhines
- Mr. and Mrs. Donald A. Berg
- Texas Instruments Foundation
- The Deason Foundation
- Mr. Raymond L. Norbury, Jr.
- Mr. Douglas R. Deason and Ms. Jacki Pick Deason

Meadows School of the Arts Campaign Steering Committee Summary Outcomes

Campaign Steering Committee Members:

Jennifer Burr Altabef '78, '81, *Co-Chair*

Linda Pitts Custard '60, '99

Doyle D. Glass '84, '88

Kelli Herd '83

Samuel S. Holland, *Dean, Ex Officio*

Todd M. Lemkin

Barbara Thomas Lemmon

Sarah Fullinwider Perot '83, *Co-Chair*

Martha Peak Rochelle '76

Peggy Higgins Sewell '72, *Co-Chair*

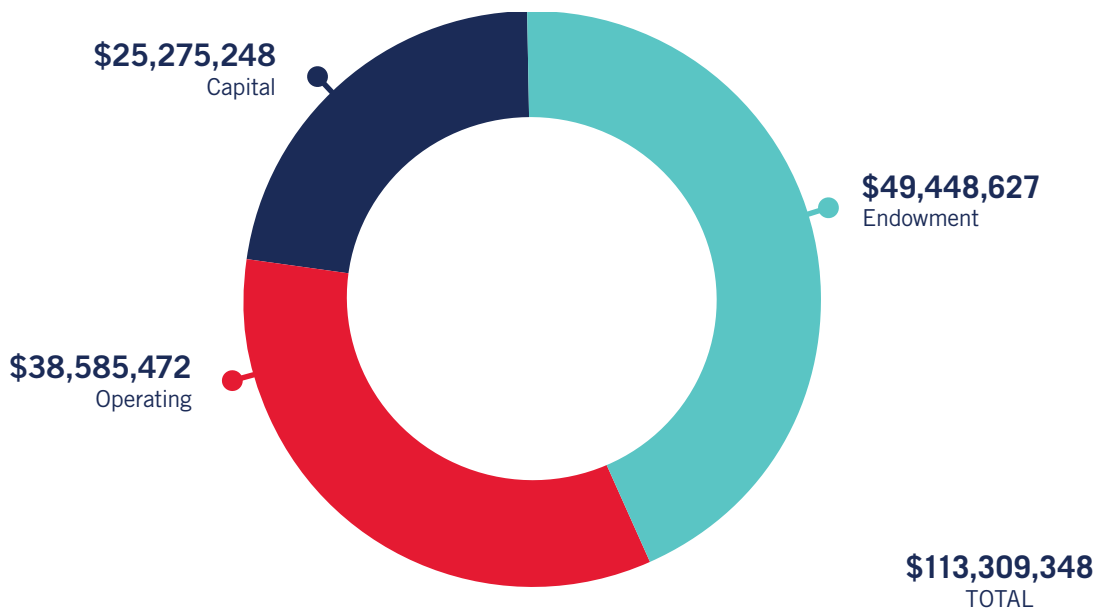
Marvin B. Singleton '89, *Co-Chair*

R. Gerald Turner, *President, Ex-Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Sam Holland, Algur H. Meadows Dean

DEA Staff Liaison: Nick Weege, Director of Development, Meadows



Campaign Highlights

- 46 new endowed scholarships
- 8 new endowed academic positions
- Examples of Campaign impact
 - Extensive renovation to the Owen Arts Center
 - \$15 million gift to launch the new G. Marlyne Sexton Institute for Musical Theatre
 - First new endowed division chair at Meadows in more than twenty years (Claire Morris Spaht Chair of the Division of Art)
 - Established the Custard Institute for Spanish Art and Culture with a gift from Linda and Bill Custard and The Meadows Foundation
 - Since launching in 2020, nearly \$1 million in Meadows Impact Scholarship funding has provided essential financial support for students and families.

Notable Principal and Major Gifts (Cumulative)

- Principal Gifts
 - Faculty Support
 - Jeanne R. Johnson Endowed Music Faculty Excellence Fund
 - Claire Morris Spaht Chair of the Division of Art
 - G. Marlyne Sexton Director of Musical Theatre
 - Mark A. Roglán Director of the Custard Institute for Spanish Art and Culture
 - Alessandra Comini Endowed Professorship in European Music History
 - The Cox Family Endowed Professor of Painting and Drawing
 - Student Support
 - The Laurie Hickman Cox Scholarship Fund
 - The Linda Gardner and Fred Alsup Endowed Fellowship for Research in Spanish Art
 - The Jack Frost Sanders Endowed Film Scholarship Fund
 - Phillips Foundation Social Impact Lab
 - Gayle and Paul Stoffel Endowed Meadows Scholar Fund
 - The Martha Raley Peak Fellowship Ensemble-in-Residence Endowment Fund
 - Capital Support
 - Gene and Jerry Jones Grand Atrium and Plaza
 - Gene and Jerry Jones Chandelier Installation
 - Nancy C. and Richard R. Rogers Center for Visual Arts
 - Sexton Family Courtyard
 - Sexton Family Art Studio and Terrace
 - Sexton Family Suite for Creative Computation
 - Paul W. Harris Promenade
 - William B. Jordan Gallery (pooled funds)
 - Mark S. Moussa Foundations Studio
 - Sewell Family Suite for the Algur H. Meadows Dean
 - The Moody Foundation Gallery Conference Room
 - Prothro Suite for Graduate Studios
- Selected Major Gifts
 - The Altabef Production Fund for Theatre
 - The Sarah F. Perot Endowed Meadows Scholars Fund
 - Eleanor L. Williams Endowed Scholarship Fund
 - The Edward R. and Mary Ann Hyde Endowed Meadows Scholar Fund

- The Meadows Museum Mellon Fellows Program
- David Kelleher Family Newsroom
- Barbara Lemmon Art History Classroom
- Kelli Herd Endowed Film Internship Fund
- Doyle and Somer Glass support for Musical Theatre Program
- The Michael Aurbach Endowed Division of Art Fund

Perkins School of Theology Campaign Steering Committee Summary Updates

Campaign Steering Committee Members:

Jane R. Bolin

Dodee Frost Crockett '03, *Co-Chair*

Joe Hardt, *Co-Chair*

Katherine Glaze Lyle '71, '73, '94

Hugo Magallanes, *Dean ad interim, Ex Officio*

Charles R. Millikan '71

Gay F. Solomon

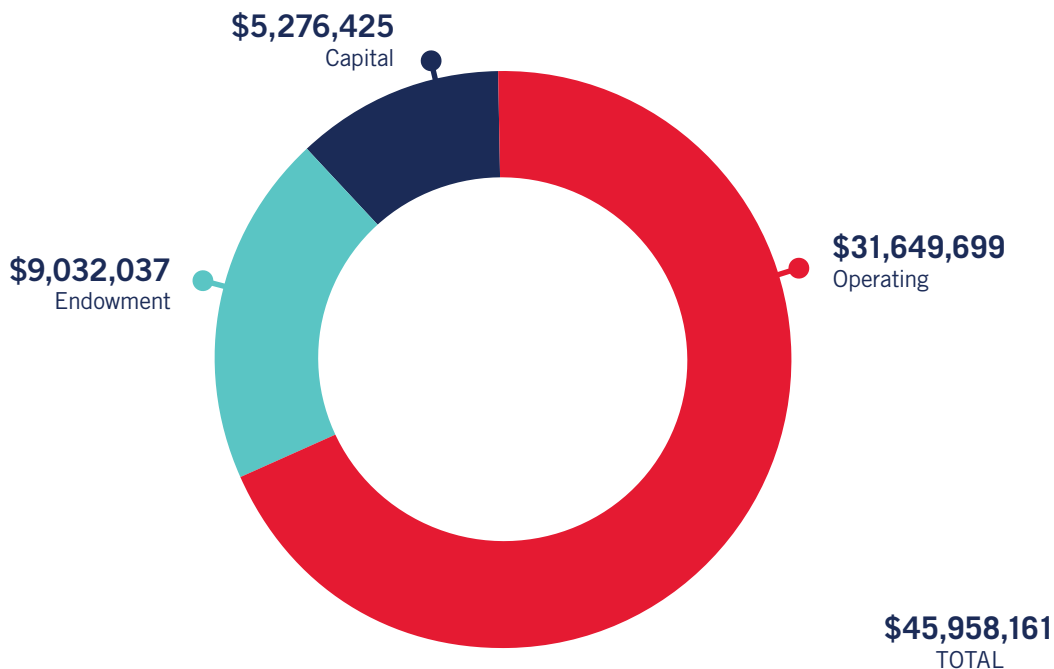
Julie Yarbrough, *Co-Chair*

R. Gerald Turner, *President, Ex-Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Hugo Magallanes, Leighton K. Farrell *Dean ad interim*

DEA Staff Liaison: John Martin, Director of Development, Perkins



Campaign Highlights

Scholarship Funds

This is the most pressing need of the School of Theology. We desire to graduate students with minimal debt.

- The Perkins Scholars program was initiated at the beginning of the campaign. During the campaign, \$2.4 million was contributed by Perkins Executive Board members for outstanding M.Div. students. There have been 115 students who have benefited from this enhanced scholarship for outstanding Master of Divinity students.
- An anonymous donor gave \$1 million in scholarship aid for United Methodist students from the North Texas region.
- Eight new endowed scholarship funds were created.
- More than \$1 million was received through the Public Life Personal Faith annual scholarship luncheon during the Campaign.
- Baptist House of Studies was created through the generosity of the Eula Mae and John Baugh Foundation. Most of the \$4.8 million from four gifts received during the Campaign is designated for scholarship help for Baptist students. Without the Baugh Foundation, the Baptist House of Studies would not be as successful as it is.
- Significant planned gifts, designated for scholarship aid, will be coming to Perkins because of many donors who have revealed that Perkins is in their wills or trusts.

Enhanced Facilities

- Bridwell Library was the recipient of all the holdings from the World Methodist Museum. This makes SMU the preeminent place to study Methodism and Wesley Studies.
- The Lilly Endowment awarded SMU \$2.5 million to refurbish and enhance the exhibition spaces in Bridwell Library. The grant allows us to refurbish the Prothro Gallery, build an Antiquities Gallery, create a print and papermaking lab, and remodel the Blue room to enhance the historical material. We anticipate that the construction will be completed in 2026.
- Perkins Chapel has been totally renovated and is now in pristine condition after the devastating steam leak of 2019. The renovation includes refinishing the pews, floors, and other surfaces, fresh paint, new lighting, and new sound and audio-visual systems. The final highlights were the installation of the Caren and Vin Prothro Organ and the Gail and Gerald Turner Piano.
- Kirby Parlor is being updated. It is being transformed with new windows, furniture, and lighting, and appropriate paint and artwork on the walls. Almost half of the funding came from a bequest by Rev. Dr. Anthony Clay Cecil, Jr. (Th.M. '67). The million-dollar remodeled space will provide a versatile venue for faculty presentations, receptions, and prospective student gatherings, as well as a place for the Dean to entertain large and small groups, hold lunches, or plan other events.

Other Significant Accomplishments

- An anonymous donor provided funds to name the Perkins Dean the Leighton K. Farrell Endowed Dean.
- More than \$13 million received from the United Methodist Church for the School's Ministerial Education Fund.
- Two \$1 million Lilly grant projects are successfully operating.
- The Center for Preaching Excellence received significant funds from the Lilly Endowment and the Robert H. and Beverly U. Fowler Foundation Trust.
- More than \$1 million secured for the Lloyd Graduate Fellowship Fund.

Top Donors to the Campaign

- The United Methodist Church, General Board of Higher Education and Ministry
- Eula Mae and John Baugh Foundation
- The Lilly Endowment
- An Anonymous Donor
- Katherine Glaze Lyle
- Gay and William Solomon
- Judy and James Gibbs
- Dodee and Billy Crockett
- Jane and Pat Bolin
- Joe Hardt
- Estate of Dr. Mark Lemmon
- Estate of Rev. Dr. Anthony Clay Cecil
- The James Seehorn Seneker Trust

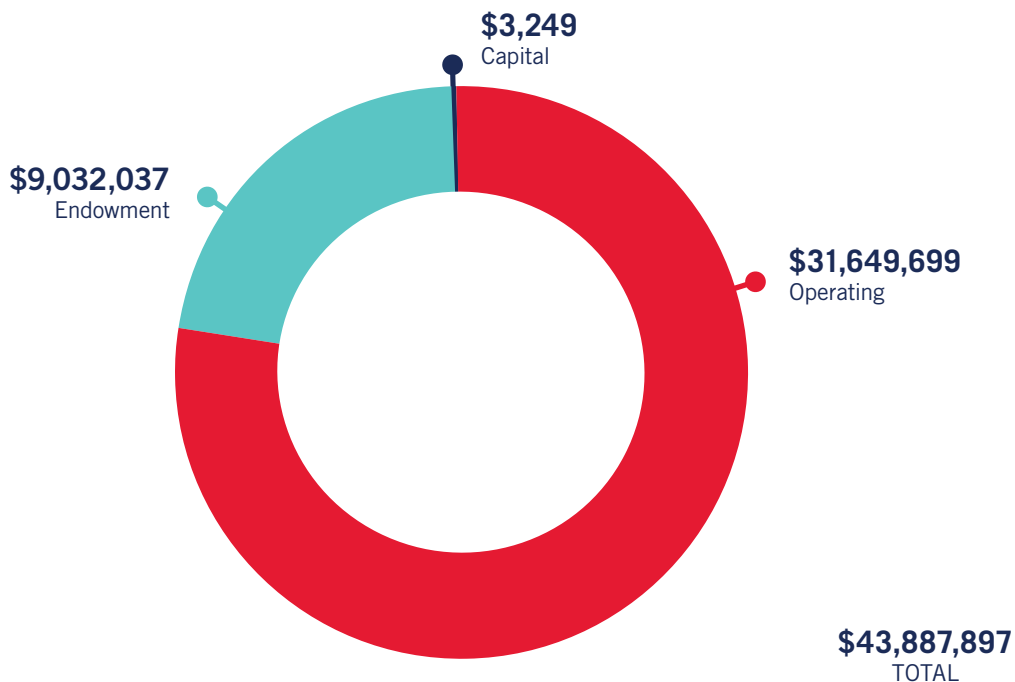
Simmons School of Education and Human Development
Campaign Steering Committee Summary Updates

Campaign Steering Committee Members:

Lottie Brodsky-Lyle
Calvert S. Collins-Bratton
Richard H. Collins '69, *Co-Chair*
Regen Horchow
George W. Killebrew, IV '85
Stephanie L. Knight, *Dean, Ex Officio*
Biegel Macaraeg '05
Connie Blass O'Neill '77, *Co-Chair*
Jeanne L. Phillips '76
Carol Paris Seay '66, '71
Connie M. Sigel '85
Philip J. Wise '78, '81
M. Catherine Zollars
R. Gerald Turner, *President, Ex-Officio*
Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

Dean: Stephanie Knight, Leon Simmons Dean

DEA Staff Liaison: Jeffrey King, Director of Development, Simmons



Campaign Highlights

- Number of new endowed scholarships
 - **33 Total**
 - The Kathryne and Gene Bishop Endowed Scholarship Fund
 - The Jim and Doris Hodges Endowed Scholarship Fund
 - The Hohlt Family Endowed Scholarship Fund
 - The Leigh Anne and William Neal Endowed Scholarship Fund
 - The Catherine Zollars, PhD and Robert Lee Zollars Endowed STEM Education Scholarship Fund
- Number of new endowed academic positions:
 - 1.) The Mary Elizabeth Holdsworth Endowed Professorship Fund
- Examples of Campaign impact
 - **Academic and Research Excellence with Sustained National Recognition -** Simmons has evolved into a top-tier institution for graduate education, consistently ranked among the top 50 in the nation by U.S. News & World Report, and among the top 3 education schools in Texas. Through a strategic emphasis on research, community partnerships, and organizational growth, Simmons has strengthened its reputation as a national leader in education innovation and impact.
 - **Expansion of the Garcia West Dallas STEM School as a National Model -** Thanks to support from donors like Carter Creech, Toyota USA Foundation, and the Butchers, Simmons helped launch and expand the Dr. Elba and Domingo Garcia West Dallas STEM School. This innovative partnership with Dallas ISD and Toyota integrates research and practice to create a pipeline of STEM-ready students. It now serves as a national blueprint for public-private STEM education partnerships, drawing attention from across the country.
 - **Scholarship Access for Education Professionals Serving High-Need Communities -** Gifts from donors like Kathy and Gene Bishop, the Hunts, the Waghornes, and Linda Gladden have funded scholarships for over 100 Simmons Scholars, many of whom are Dallas ISD educators. These scholarships support graduate and doctoral degrees focused on areas such as special education, early literacy, English as a second language, and school leadership, directly addressing workforce shortages and equity in local schools.
 - **Elevating Research Impact Through Endowed Centers and Chairs -** The creation of The Addy Foundation Center on Research and Evaluation (CORE) and the Research in Mathematics Education Chair (funded by Texas Instruments) has allowed Simmons to scale research, evaluation, and data-driven impact. These

investments are helping non-profits and school districts across Texas measure outcomes and improve services—enhancing Simmons' role as a leader in evidence-based education reform.

- **Innovative Program Growth in Sport Management and Career Readiness -** Donors like Michael and André Koester have strengthened Simmons' Applied Physiology and Sport Management program, equipping students with professional skills in sports and health leadership.

Cumulative Principal Gifts During the *SMU Ignited* Campaign

- The Addy Foundation
- Kathy S. Bishop and Gene H. Bishop†
- Carolyn Fulgham Butcher '62 and Preston Butcher
- Charles C. Butt
- Carter Creech '60, '63 and Elizabeth W. Creech
- Linda S. Gladden
- Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65
- Texas Instruments and Texas Instruments Foundation
- Toyota USA Foundation
- Carolyn and Rick Waghorne

Cumulative Major Gifts During the *SMU Ignited* Campaign

- Jacquelin L. Sewell Atkinson '07 and William R. Atkinson '19, '20
- Harry W. Bass, Jr. Foundation
- Dorothy Reid Budd '06 and Russell W. Budd
- Stephen and Carol Cassiani Family Foundation
- Patricia Meeker Cather '52 †
- CFP Foundation
- Serena Simmons Connelly †
- The Constantin Foundation
- Berta M. Glazer and Emerson U. Glazer
- Chandler Klevana and Leighton A.C. Klevana
- James T. Mobley '81 and Wynona L. Mobley
- Moody Foundation
- Leigh Anne Neal '89 and William A. Neal, II
- Michal Hutcheson Powell '79
- Raise Your Hand for Texas Education Fund
- Robert L. Thaggard '11
- Truist Foundation
- Jack Butler and John M. Vanderlinden
- XPRIZE Foundation, Inc.
- M. Catherine Zollars, PhD

Athletics Campaign Steering Committee Summary Updates

Campaign Steering Committee Members:

Kathryn Hedges Arata '87, '91

William D. Armstrong '82, *Co-Chair*

R. Steve Folsom '81

Damon Evans, *Director of Athletics, Ex Officio*

Kristin Wagner Henderson '82

William J. Howard '00

James E. Landen, Jr. '10

Melody L. Mattox '91

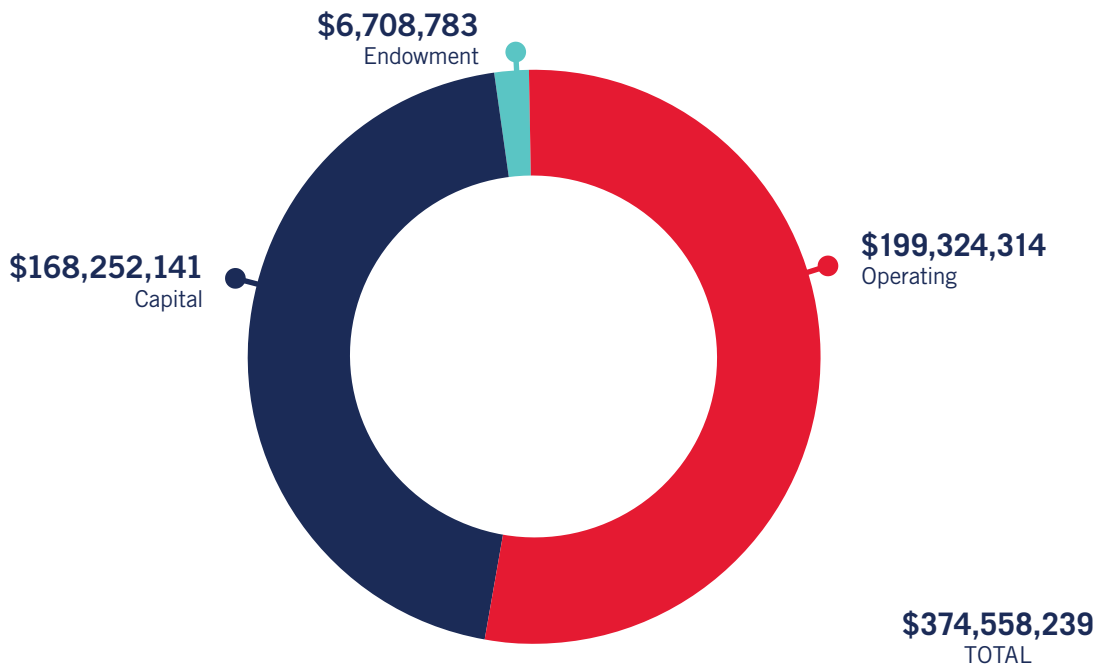
Bruce A. Robson '74, *Co-Chair*

Thomas W. Sabin, Jr. '79

R. Gerald Turner, *President, Ex-Officio*

Brad E. Cheves, *Senior Vice President for Development and External Affairs, Ex-Officio*

DEA Staff Liaison: Joshua Whittenburg, Associate Athletic Director for Development



Campaign Highlights

- Examples of Campaign impact
 - Campaign Priorities
 - ACC Competitiveness Campaign - First Week Society raised \$100M in seven days
 - Armstrong Fieldhouse
 - Garry Weber End Zone Complex
 - Washburne Soccer and Track Stadium
 - Holt Hickman Outdoor Pool
 - Resurfacing of Ford Stadium Field
 - Revenue Sharing Campaign
 - Increase number of Mustang Club Members (achieved highest on record)
 - Increase yearly gift revenue (achieved highest on record)
 - Vision 2025 Initiative
 - Fiscal year 2025 Mustang Club fundraising stats (as of 4/24/2025):
 - \$58,480,966 in cash raised
 - New record (prev. FY24 - \$55,013,583)
 - Projected to reach \$65M in cash by end of fiscal year
 - 5775 athletics donors
 - New record and 23% YOY increase
 - 5 new seven-figure pledges in fiscal year 2025
 - 17 new six-figure pledges in fiscal year 2025
 - Launched new Young Alumni Program with 124 new members

Project Fundraising Status Report

Following is a list of some of the most visible Capital projects supported by the Campaign. For those projects still in active fundraising, numerous opportunities exist to recognize donors with future naming of spaces within the facilities.

ACC Competitiveness Campaign

Fundraising Goal: \$125,000,000

Pledges and Outright Gifts to Date: \$127,552,175

Percentage of Goal Achieved: 102%

Clements Hall Scholars Den Renovation

Fundraising Goal: \$1,500,000

Pledges and Outright Gifts to Date: \$1,555,010

Percentage of Goal Achieved: 104%

Cox School of Business Renovation and Expansion

Fundraising Goal: \$140,000,000

Pledges and Outright Gifts to Date: \$135,895,003

Percentage of Goal Achieved: 97%

Dedman Law Centennial Challenge

Fundraising Goal: \$2,000,000

Pledges and Outright Gifts to Date: \$2,781,483

Percentage of Goal Achieved: 139%

Garry Weber End Zone Complex Project

Fundraising Goal: \$100,000,000

Pledges and Outright Gifts to Date: \$87,103,737

Percentage of Goal Achieved: 87%

Holt Hickman Outdoor Pool

Fundraising Goal: \$11,000,000

Pledges and Outright Gifts to Date: \$12,858,457

Percentage of Goal Achieved: 117%

Hughes-Trigg Student Center Renovation

Fundraising Goal: \$5,000,000

Pledges and Outright Gifts to Date: \$2,734,704

Percentage of Goal Achieved: 54%

Mustang Excellence Scholarships (formerly Black Unity Forum)

Fundraising Goal: \$10,000,000

Pledges and Outright Gifts to Date: \$6,209,244

Percentage of Goal Achieved: 62%

Owen Arts Center Renovation Phase One

Fundraising Goal: \$34,000,000

Pledges and Outright Gifts to Date: \$35,275,248

Percentage of Goal Achieved: 104%

SMU-in-Taos Capital Project

Fundraising Goal: \$750,000

Pledges and Outright Gifts to Date: \$745,100

Percentage of Goal Achieved: 99%

Thomas House

Fundraising Goal: \$5,000,000

Pledges and Outright Gifts to Date: \$5,062,316

Percentage of Goal Achieved: 101%

Vision 2025

Fundraising Goal: \$6,000,000

Pledges and Outright Gifts to Date: \$6,974,915

Percentage of Goal Achieved: 121%

Minutes of Campaign Executive Committee Meetings

Meeting of the Campaign Executive Committee December 5, 2019

10:15 – 11 am Reception; 11:00 am – 12:00 pm Meeting

George W. Bush Institute, Hall of State

MEETING MINUTES

At 11:00 am, Mr. Gerald Ford called the meeting to order.

Committee members in attendance were: Jennifer Altabef, Bill Armstrong, Liz Armstrong, Mike Boone, Tucker Bridwell, Lottye Brodsky-Lyle, Richard Collins, Kelly Compton, Bob Dedman, Gerald Ford, Joe Hardt, Will Howard, Ray Hunt, Ashlee Kleinert, Bobby Lyle, Scott McLean, David Miller, Kyle Miller, Connie O'Neill, Sarah Perot, Jeanne Phillips, Mark Plunkett, Caren Prothro, Kirk Rimer, Bruce Robson, Marvin Singleton, Michael Sullivan, Amy Ware, Richard Ware, Ed Wilson and Julie Yarbrough.

Others in attendance were: R. Gerald Turner, President; Brad Cheves, Vice President for Development and External Affairs; Jennifer Collins, Dean, Dedman School of Law, Rakesh Dahiya, Treasurer and Chief Investment Officer; Thomas DiPiero, Dean, Dedman College; Rick Hart, Director of Athletics; Craig Hill, Dean, Perkins School of Theology; Sam Holland, Dean, Meadows School of the Arts; Holly Jeffcoat, Dean of Libraries; Stephanie Knight, Dean, Simmons School of Education and Human Development; K.C. Mmeje, Vice President of Student Affairs; Peter Moore, Provost *ad interim*, Matt Myers, Dean, Cox School of Business; James Quick, Dean, Research and Graduate Studies; Chris Regis, Vice President for Business and Finance; Harold Stanley, Vice President for Executive Affairs; and Paul Ward, Vice President for Legal Affairs.

Absent were: Jon Altschuler, Jim Baldwin, Dodee Crockett, Martin Flanagan, Hilda Galvan, David Huntley, Carl Sewell, Peggy Sewell and Rich Templeton.

- Mr. Ford welcomed everyone to the first meeting of the Campaign Executive Committee. The Campaign Executive Committee is composed of members of the Campaign Leadership Council and the co-chairs of our Campaign Steering Committees. Mr. Ford thanked the Committee for its service during the planning phase of the University's upcoming campaign and for attending the meeting.
- Mr. Ford announced that the Committee was joined by the members of the President's Executive Council, SMU's academic deans, and the Director of Athletics.
- The Committee was joined by the staff leadership of Development and External Affairs as well as SMU's Directors of Development who support the Campaign Steering Committees.
- To begin the session, Mr. Ford asked Dr. Turner to provide his perspective.

Dr. Turner reported the following:

- Dr. Turner thanked the Committee members for their service and attendance. He noted that most Trustee committees were meeting in the Miller Events Center due to the renovations being made to the Hughes-Trigg Student Center. He was appreciative that the Bush Presidential Center was able to accommodate the Committee, as it required a much larger room.
- Dr. Turner expressed that it was an exciting time at SMU, especially in terms of campaign planning. Dr. Turner asked the Committee to recall that SMU's past two comprehensive campaigns were multi-year initiatives, requiring a planning phase and a public phase. SMU launched each campaign with stated projects and financial goals, which were exceeded. Over several years, a committee similar to the Campaign Executive Committee met twice a year to provide updates and address issues related to achieving the campaign goal, or extending the campaign timeframe. Dr. Turner expressed that the Committee's leadership of the individual Campaign Steering Committees is critical as SMU plans the upcoming campaign launch and determines its financial and initiative goals.
- Over the course of the fall, Dr. Turner and Vice President Brad Cheves attended the first meetings of the various Campaign Steering Committees. Dr. Turner stated that they both were pleased with the energy and excitement the committee members were bringing to this project. In those meetings, the University

provided updates on its early announcements and events.

- SMU was delighted with the groundbreaking for Ford Hall for Research and Innovation in Spring 2019. Kelli and Gerald Ford, the naming donors of the project, were joined by Mr. Mitch Hart and Mrs. Linda Hart who made a significant commitment the building as well.
- The fall began with the dedication of the IPC and Armstrong Fieldhouse, named in honor of Liz and Bill Armstrong's commitment. Mr. and Mrs. Armstrong were joined by dozens of other major and principal gift donors on that project.
- Dr. Turner was excited to announce the historic commitment from Carolyn and David Miller in support of the Cox School, stating that this early commitment would provide tremendous energy and momentum for the Cox school's portion of the campaign.
- Dr. Turner informed the Committee that the Lyle campaign received a boost with the announcement that Dr. Bobby Lyle made possible with the funding of two of its new endowment initiatives, just as it publicly revealed the School's newest strategic plan.
- SMU celebrated the beginning of the Owen Arts Center renovation, with three families providing \$5 million each, plus a matching gift of \$10 million from the Meadows Foundation. Dr. Turner added that many others had supported that project at various levels.
- SMU announced the establishment of its eighth school, the Moody School of Graduate and Advanced Studies. On that day, SMU gathered together representatives of all the school naming benefactors, who welcomed the Moody family and Foundation to that illustrious roster.
- Dr. Turner added that SMU's three-year Pony Power initiative continued to create excitement across the donor-base on top of all of the other announcements.
- Dr. Turner expressed that the University was very pleased with its campaign progress to date, and was looking forward to hearing from the Steering Committees as they progress into planning, identifying early funding priorities, and helping SMU determine its public phase launch and public goals for the campaign.

Upon concluding his report, Dr. Turner called upon Mr. Brad Cheves to deliver the Campaign Overview.

- Mr. Cheves directed the Committee's attention to Tab B, which provided a summary of accomplishments from the Second Century Campaign. Following the summary was a complete list of the endowed faculty positions, endowed scholarships, academic initiatives, and facilities supported by gifts to the campaign.
- Mr. Cheves recalled that the Second Century campaign raised over \$1.15 billion in commitments for all areas of the University, in gifts of all sizes, for operations, endowment and capital purposes. He added that this total also included planned gifts. The

\$1.15 billion total was compared to SMU's previous campaign, A Time to Lead, which generated \$542 million in commitments.

- The two pyramids compared SMU's two campaigns in terms of commitment levels. At the bottom, it was shown that the numbers of donors increased more than 50% between campaigns, and SMU had received more commitments at every financial level. Mr. Cheves reinforced that campaigns are effective for increasing the level of support as well as the number of supporters.
- Mr. Cheves directed the Committee's attention to a slide displaying the Campaign Planning Phase Volunteer Structure. Mr. Cheves added that a complete list of committees and their memberships could be found behind Tab C of the packet.
- Mr. Cheves directed the Committee to a slide on Planning Decisions. Mr. Cheves stated that as the Campaign Leadership Council had been meeting and advising both him and Dr. Turner, they had made several recommendations, which could be seen on the slide. He added that determining what was being counted toward the new campaign's financial total was of the highest priority. Mr. Cheves stated that the Campaign accounting guidelines were located behind Tab D of the packet.
- Mr. Cheves directed the Committee to a slide on Donor Counts. Mr. Cheves added that a list of the donors, following those guidelines, whose cumulative commitments to the campaign meet or exceed the \$1 million mark was located behind Tab E of the packet. Mr. Cheves noted the various breakouts for SMU's donor levels above the \$1 million mark.

- Mr. Cheves directed the Committee to a slide on SMU's Next Steps in Marketing Preparation. He stated that marketing serves as a key area in preparing for the public phase of a campaign, and SMU staff had been working with several outstanding partners to aid the University in that area.
- Mr. Cheves informed the Committee that SMU was conducting research to better understand its principal gift donors and prospects. In this effort, the University hired Carnegie Dartlet, a leading research firm that focuses exclusively on higher education clients. Earlier this summer, SMU sent out an online survey to 12,000 top donors and prospects, asking what motivated them to make their largest donations, how other nonprofit organizations they admire have built strong relationships with them, and how they viewed SMU and the kind of impact it makes. Mr. Cheves added that SMU looks forward to sharing key insights with the Committee in the future.
- Mr. Cheves that the University was also working to develop a new brand for the Campaign. SMU developed a contract with Bright Design, a branding agency out of Los Angeles that has done work for Stanford and UCLA, as well as clients in other sectors like the Grammy Awards, National Car Rental, Safeway and several others. Over the summer, Bright conducted an extensive discovery phase that included reviewing information from the SMU's past campaigns, the SMU strategic plan and the research conducted by Carnegie Dartlet. Additionally, Bright visited SMU and conducted interviews with 90 volunteers, university leaders, alumni and staff, and they sent a survey to alumni and members of the campus community.
- Mr. Cheves directed the Committee to a slide on Campaign Theme. He believed that one of the most important things to emerge from Bright's interviews was summarized by a graphic displaying the three campaigns. In the first campaign, A Time to Lead, the University demonstrated that its community of supporters really was strong enough to give SMU the confidence to take on even bigger challenges. During the second campaign, the University built the infrastructure that is characteristic of the kind of school SMU aspires to be. For SMU's third campaign, Bright would advise the University that it promotes its impact, more than its needs. Mr. Cheves added that SMU will be exploring themes and names for the campaign using that perspective.
- Mr. Cheves stated that the organizational structure of the campaign had been coming together well, and with the recent record years of giving, the University believes it will be well-poised to launch the campaign within the upcoming year.

Upon concluding his report, Mr. Cheves called upon The Honorable Jeanne Phillips to deliver the National Committee Update.

- Ms. Phillips was pleased to report that the National Campaign Committee had a productive first meeting on December 2, 2019.
- Ms. Phillips stated that the charge of the National Campaign Committee was to build, strengthen and engage SMU's national and international alumni, parent and friend network through in-person and regional engagement methods.
- In the Second Century Campaign, the National Campaign program was composed of multiple regional-based committees which were both time and staff intensive. Ms. Phillips stated that the National Committee was re-tooling its volunteer model to have individual committee members from identified priority markets on staff. The National Campaign Committee is led Ms. Phillips, Mr. Scott McLean, Mr. Marty Flanagan, Mr. Richard Ware and Mr. Ed Wilson.
- Ms. Phillips stated that SMU's Office of Annual Giving and Alumni Relations hosted over 130 events in 38 US cities during the 18 months preceding the meeting, with an increase of 52% in regional event attendance.
- Ms. Phillips informed the Committee that DEA completed over 11,000 personal visits with constituents outside of Dallas during the Second Century Campaign. These efforts helped result in over \$114M in donations from outside of the city.
- As SMU progresses towards its formal launch of the next campaign, the University will begin targeted list reviews, brokered introductions and the initial planning of regional-based campaign launch events.

- Ms. Phillips asked for Committee members to pass along the names of key leaders, who would be ideal members for the National Campaign Committee, to Blake Davis, AVP for Principal and Major Gifts, or herself.

Upon concluding her report, Ms. Phillips returned the floor to Mr. Cheves, who called upon Mr. Tucker Bridwell to deliver the Cox School of Business update.

- Mr. Bridwell stated he was pleased to be in attendance and represent the Cox School of Business Campaign Steering Committee, composed of himself and co-chairs Mr. Kyle Miller, Mr. Mark Plunkett, and Mr. Kirk Rimer.
- Mr. Bridwell turned to the subject of Initial Funding Priorities, stating that the Cox School's priorities for the upcoming campaign would be facilities, scholarship endowments, scholarship current-use support and programmatic support.
- Mr. Bridwell directed the Committee's attention to a slide showing a rendering of the Cox building project. SMU remained in the programming phase and would have more information on naming opportunities in the spring.
- Mr. Bridwell stated that scholarships remained an important piece in maintaining a strong business school. The Cox School would continue its efforts to raise both endowment and current-use support to support scholarships. Mr. Bridwell added that the School's centers and institutes would remain an important piece of the Campaign, providing both endowment and current use support.
- Mr. Bridwell stated that the School stands by its commitment to maintaining excellent facilities, scholarships, and strong programs to maintain a competitive business school.
- Mr. Bridwell listed the following major achievements:
 - \$50M from Carolyn and David Miller, representing the largest single individual donation to SMU from an alumnus.
 - 100 years of business education at SMU in February 2020.
 - Total Campaign funds of \$87.6M raised to date with \$18 million supporting Pony Power.
 - Mr. Bridwell stated that the salary data for the Cox School remained impressive. He informed the Committee that full-time, two-year graduates of Cox were making an average salary of \$114,000 with 65% receiving a bonus of \$27,000. Those who received BBAs obtained average an average salary of \$66,300 with 37% receiving a salary bonus of \$8,287.
 - Mr. Bridwell stated that the Cox school was focused on recruiting and retaining women in the program, who compose 40% of the School's graduate and undergraduate population.
 - Mr. Bridwell stated that the inaugural MBA reunions were very successful.
 - Mr. Bridwell reiterated that Cox was still working on the programming phase of the new building project and would continue to keep the Committee updated as things progress.
- Mr. Bridwell turned to the subject up important dates, stating that the next Cox campaign steering committee would occur on January 17, 2020
- Mr. Bridwell stated that Cox had two events celebrating 100 years of business education. First, the School would hold faculty and staff event on the actual anniversary date of February 20, 2020. Then on April 17, Cox planned hold a gala at Moody Coliseum with key SMU and Cox supporters, which would be rescheduled for a later date. Mr. Bridwell expressed hope that the Committee would be able to join the Cox School for this celebration and asked for members to reach out to him, Dr. Michael Myers, or Ms. Ashley Pitts for assistance.

Upon concluding his report, Mr. Bridwell returned the floor to Mr. Cheves, who called upon Ms. Liz Armstrong to deliver the Dedman College Update.

Ms. Armstrong reported the following:

- Ms. Armstrong expressed that she was pleased to represent the Dedman College Campaign Steering Committee, composed of herself, and co-chairs Ms. Ashlee Kleinert and Mr. Jon Altschuler
- Ms. Armstrong stated that the campaign funding priorities for Dedman College would be the following:
 - Scholarships / Fellowships / Postdocs
 - Deanship and Faculty Positions
 - Strengthen Academic Programs and Centers
 - SMU Human Rights Program
 - Teaching and Research Lab Space
 - Dean's Research Council
 - New Interdisciplinary Research
 - Post-Doctoral Support
 - Scholarships / Fellowships
- Ms. Armstrong stated that Dedman College developed plans to continue building undergraduate scholarship support, specifically through the Dedman College Scholars program, as SMU approaches its third capital campaign. In addition to undergraduate scholarships, Dedman College would aim to strengthen its academic programs and centers, such as SMU's Human Rights Program and the Dedman College of Interdisciplinary Institute. Ms. Armstrong added that Dedman College developed interdisciplinary research that, with the right funding, would have the potential of developing into exciting new research centers, such as a possible Center for Ethics and Technology, which would bring together Dedman and Lyle faculty.
- As the University moves to invest even more in high performance computing and data science, both in its curriculum and in its research, Dedman College will remain its most important contributor. Ms. Armstrong stated that faculty members in the Department of Statistical Science, along with virtually all of the faculty in mathematics, economics and some other disciplines, would contribute to this cutting-edge work.
- Ms. Armstrong stated that Dedman College will aim to build awareness and support for the fantastic research happening in the School--whether it is research in cancer, dark matter, seismic activity, or economics in areas of Texas and Mexico. Ms. Armstrong added that the quickest way to increase SMU's research capabilities is to endow key faculty positions and provide excellent graduate students and postdoctoral support through fellowships. In addition to providing endowed positions, Dedman College will be exploring the necessary space needs for both teaching and research labs.
- Dedman Colleges celebrated a number of wonderful achievements. Ms. Armstrong provided the following examples:
 - \$2.5 Million in endowed and current use funding from Mission Foods (GRUMA Corporation) to support the Mission Foods Texas-Mexico Center.
 - \$1.29 Million from the estate of Gayle Fogelson, who told SMU he believed that a liberal arts education was an important foundation for his business success. Ms. Armstrong added that the estate gift was unrestricted for Dedman College.
 - \$1.9 Million from Peggy Sewell and Carl Sewell and multiple donors in support of the Dedman College Scholars Challenge Grant.
 - \$1 Million in planned giving from 1964 alumnus Jack Sanders to enhance the Nancy Crow Sanders Endowed Dedman College Scholars Fund Endowment to support a student studying mathematics, statistics or economics.
- Ms. Armstrong stated that the next Dedman College Campaign Steering Committee would meet on

April 2, 2020.

- Ms. Armstrong asked for the Committee to reach out to her, Dr. Thomas DiPiero or Ms. Paula Voyles with questions.

Upon concluding her report, Ms. Armstrong returned the floor to Mr. Cheves, who called upon Ms. Amy Ware to deliver the Dedman School of Law update.

- Ms. Ware stated that the Law School would focus on and generate support for its areas of distinction. These consist of the areas where the School can make the most gains and elevate the Dedman Law in stature and reputation.
- The Robert B. Rowling Center for Business Law and Leadership would focus on developing leaders at the intersection of law and business and providing a resource for the DFW business community. Ms. Ware added that law students were gravitating towards future careers that require training and knowledge in business fundamentals and leadership more than ever before.
- The Deason Criminal Justice Reform Center's mission is to promote criminal justice reform by conducting, supporting, and disseminating data-driven criminal justice research. Ms. Ware stated that the Center's donors had been providing operational funding for this initiative and would continue to secure endowment funding as well.
- Ms. Ware stated that the facilities within Dedman Law would remain a top priority. Florence Hall remained the law school's primary classroom building and has received numerous renovations since its construction in 1924. Ms. Ware expressed that it was time to replace this building with an instructional facility befitting one of the country's best law schools.
- Ms. Ware informed the Committee that the law library and Storey Hall were also in need of renovation but the classroom building would remain the School's top priority.
- Ms. Ware stated that endowed Chairs and professorships in emerging areas such as; innovation and entrepreneurship, cyber security and data privacy were a few of the areas where the school had been seeing demand.
- Ms. Ware stated that the School relied on scholarships to recruit top quality students who will excel in law school. Competition for these students is intense, so scholarships often make the difference in a student's institutional choice. They are also critically important in reducing the burdensome debt many students face. She added that scholarships will always be a top priority of the law school.
- Ms. Ware stated that wellness – particularly regarding mental health—is vitally important to the School's students, due to the fact that it serves as a major influence in the lawyers they will become. Dedman law would like to provide programing and support in this area.
- Ms. Ware informed the Committee that Dedman Law developed 11 clinics and four of those clinics had external funding sources. Those with external funding were able to do more and serve more clients. Clinics provide critical experiential learning opportunities for students. The School's goal is to have endowments or some level of ongoing support for all of these Clinics.
- Ms. Ware stated that many students enrolled at the Dedman Law School have a heart for public service and want to go into public service careers. The School wants to offer those students scholarships or some level of debt relief so that they can pursue their chosen careers.
- Ms. Ware wanted to highlight some of the largest gifts the law school has received since the last campaign. Ms. Ware added that these gifts would count in the new campaign.
 - Ms. Ware stated that one of the most exciting commitments the law school has received is a \$4M gift to establish the Rowling B. Rowling Center for Business Law and Leadership. This gift was a combination of \$3M from an anonymous donor and \$1M from the Dedman Foundation. The Center offers a rich business law curriculum and extensive opportunities for students to obtain practical experience and skills training. Generating support for the Center will remain a key campaign initiative.
 - Ms. Ware stated that the law school received an additional \$2M in funding for the Tsai Center for Law, Science and Innovation from an anonymous donor. This gift allows the Center to expand its

current offerings and research in areas such as artificial intelligence, digital currency, intellectual property and data privacy.

- Ms. Ware informed the Committee that Anne Bromberg, wife of the late law professor Alan Bromberg, plans to include the law school in her estate plans. Ms. Ware added that she didn't share the exact value of her estate, but Dedman Law conservatively estimated the gift at \$1M+.
- Ms. Ware stated that the Stanton Foundation's gift to establish the First Amendment Clinic was announced in November 2019. The First Amendment Clinic would plan to launch in the fall of 2020 and would be led by Tom Leatherbury, one of the most highly regarded First Amendment experts in the country.
- Lastly, Ms. Ware informed the Committee that President Turner, Dean Collins and Vice President Cheves had recently returned from a very successful trip to Taiwan. The goal was to present the Mustang Award to law school alumnus Felix Tsai and to thank him for his remarkable generosity.
- Ms. Ware stated that the Law School's next Campaign Steering Committee meeting would take place on Tuesday, April 7, 2020. The law school's combined Executive Board and Emerging Leader Board will meet that day as well.
- Ms. Anne Beard and Dr. Jennifer Collins will continue meet with members of the Campaign Steering Committee to strategize about how best to move forward with the campaign priorities and identify potential supporters.

Upon concluding her report, Ms. Ware returned the floor to Mr. Cheves, who called upon Dr. Bobby Lyle to deliver the Lyle School of Engineering Update.

- Dr. Lyle direct the Committee's attention to a list of endowment and current-use priorities. He stated that these are a result of the School's recent strategic planning process. The first one, the Future Fund, is a strategic investment in the continual intellectual renewal of the School. Each distinct portfolio within the Fund will provide substantial resources to a chosen area for a term of no longer than five years. Dr. Lyle informed the Committee that this would allow the launch of a new initiative with sufficient resources to quickly establish a leadership position in the important emerging area for the coming years and decades.
- Dr. Lyle thought this was such a creative and bold idea that he committed to personally funding the Emerging Research and Hi-Tech Business Innovations portfolio.
- Dr. Lyle stated that scholarships and fellowships are key to the success of the School and keep it competitive in attracting strong and capable undergraduate and graduate students.
- Dr. Lyle stated that the Research Impact fund seeks to create a bridge between conceptualization and implementation. This fund serves as an investment in high-potential early stage research, allowing ideas to mature to the point where they are likely to attract sustained external funding.
- Dr. Lyle stated that the School is celebrating the Future Fund, as well as the establishment of the Hart Institute for Technology, Innovation and Entrepreneurship by Linda and Mitch Hart. The Institute combines the resources, expertise and guidance of the Lyle School and the Cox School to develop technology prototypes and viable business plans. Dr. Lyle added that he was excited to inform the Committee that the Lyle School's Research Impact Fund continues to grow, jumpstarting projects that have gone on to secure federal funding.
- Dr. Lyle stated that the Lyle School was working to schedule a spring 2020 CSC meeting, and would be meeting with CSC members to get their input on additional prospects for the school.

Upon concluding his report, Dr. Lyle returned the floor to Mr. Cheves, who called upon Ms. Jennifer Altabef to deliver the Meadows School of Art update.

- Ms. Altabef began by thanking her fellow co-chairs: Ms. Sarah Perot, Ms. Peggy Sewell and Mr. Marvin Singleton.
- Ms. Altabef stated that Meadows was celebrating the 50th anniversary of the gift by Al Meadows to endow the arts school at SMU. He told *The New York Times*, "I'm interested in helping to make it the most distinguished arts center in the United States." Ms. Altabef stated that SMU is committed to fulfilling his

image today. In working with Dr. Sam Holland, the Meadows School identified three key areas for the next campaign: People, Centers of Excellence, and Facilities.

- Ms. Altabef stated that the arts are first and foremost about people. Scholarship funding is critical to attracting the most artistically and academically talented students. They are the hardest to get because—like gifted athletes—there is a small pool of top talent and everybody wants it.
- Ms. Altabef stated that graduate support for fellowships and stipends is also just as vital.
- Ms. Altabef stated reinforced that having research funds to pursue creative work is what gets professors to SMU and keeps them there.
- Ms. Altabef stated that Meadows was proud to have three centers of excellence that set it apart, being SMU DataArts, the Ignite/Arts Dallas, and the Meadows Museum. She added that each brings national and international attention to SMU.
- Ms. Altabef stated that nothing has brought more attention to Meadows in the last year than DataArts, the leading provider in the country for arts research and analytics. Their work averages one national press mention every three days!
- Ms. Altabef stated that the Meadows school engages with the community through Ignite/Arts by fostering arts initiatives across the region.
- Ms. Altabef stated that the Meadows Museum remained the leading center for Spanish art outside Madrid. While already acclaimed, Meadows strives to continue to elevate its profile through new acquisitions and to grow its educational programming.
- Ms. Altabef stated that the Meadows School must continue to invest in capital with facilities that are comparable to the quality of the people and work that goes on inside. The School already made huge strides to begin renovation of the Owen Arts Center's north wing, but ahead lies the necessity of bringing the rest of the building up to 21st century standards.
- To take Meadows into the future of where innovation intersects with community, the School will explore developing an arts incubator in an urban setting.
- Ms. Altabef stated that Meadows was off to a strong start with \$30 million raised, which include eight gifts of \$1 million or more. In addition, Meadows raised \$16.7 million over two years through Pony Power.
- Ms. Altabef informed the Committee that the kickoff of the long-awaited renovation to the visual arts and art history wing of the Owen Arts center occurred in November in 2019.
- Ms. Altabef stated that as Meadows continues to galvanize donors to support, the School has a few opportunities on the horizon:
 - As President Turner announced at the kickoff for Owen, past Meadows parent Marlyne Sexton issued a challenge gift to help inspire new gifts to raise the remaining \$4 million to complete the phase one goal of \$34 million.
 - In March 2020, SMU would hold the Meadows at the Meyerson concert to benefit the Meadows Scholars Program.
 - Looking ahead to fall 2021, the Meadows Museum plans to hold its next fundraiser gala to coincide with the 20th anniversary of the opening of its building. Ms. Altabef added that proceeds would benefit the Education Department.
- Ms. Altabef expressed that the Meadows School was looking forward to working with the Committee and carrying ahead the vision made by Al Meadows more than a half-century ago to create a thriving arts center at SMU.

Upon concluding her report, Ms. Altabef returned the floor to Mr. Cheves, who called upon Ms. Julie Yarbrough to deliver the Perkins School of Theology Update.

- Ms. Yarbrough stated that the Perkins School of Theology Campaign Steering Committee met on October 2, 2020 in Prothro Hall with the majority of committee members in attendance. Co-chairs Ms. Dodee Crockett, Mr. Joe Hardt, and Ms. Yarbrough led the discussion.
- Vice President Cheves reviewed the success of the Second Century Campaign and Director of Development, Mr. John Martin, reported on the accomplishments of Perkins. Dr. Craig Hill led the discussion of priorities for the next Campaign.
- Ms. Yarbrough stated that giving for both endowed and annual scholarships remained a primary focus for Perkins. Recently, Perkins had notable success raising \$630,000 through a campaign led by the Executive Board to fund ten Perkins Scholar awards each year for high-achieving Masters of Divinity students. However, the long-term viability of scholarship funding will be from an increase in the number of endowments that produce annual revenue in perpetuity.
- Ms. Yarbrough stated that the Perkins School would also seek to endow the Dean's position, joining several other SMU Schools with an endowed Deanship, and is currently finalizing a donor commitment for that important project.
- The Perkins School recognizes that much of its future funding will be from planned giving and legacy gifts as it works to enhance donor understanding of the value of ensuring theological education for generations yet to come.
- Ms. Yarbrough stated that Perkins benefitted from much-needed upgrades and improvements to its facilities as a result of the Second Century Campaign. However, several infrastructure issues to address in the forthcoming campaign still remained. Perkins Chapel will be renovated during the Campaign, which has been partially funded by a large bequest from the estate of the son of the architect who designed the Chapel.
- Because the existing organ sustained substantial damage from a steam leak, a historic replacement organ has been purchased and is ready to be rebuilt and installed in the Chapel at a cost of \$2 million. Ms. Yarbrough stated that a donor has expressed interest in funding \$1 million or half of the project, adding that this commitment will be finalized soon.
- Ms. Yarbrough stated that important renovations to Bridwell Library were in progress due to the generosity of the J. S. Bridwell Foundation in the Second Century campaign. She added that other upgrades would be necessary at some time during the forthcoming campaign.
- Ms. Yarbrough stated that strong operational support is a requisite for Perkins because of decreased income from the United Methodist Church and explained that an expanding donor base can in part mitigate that challenge. Ms. Yarbrough informed the Committee that Perkins would continue to pursue specialized grants from major foundations and funding sources that support theological education for both domestic and worldwide Perkins outreach.
- Ms. Yarbrough stated that scholarship funds remain strong due in part to events such as the annual Scholarship Luncheon. The event would feature *New York Times* columnist and best-selling author David Brooks. In addition, ongoing meetings for each Perkins project focused on productive personal engagement with potential donors and offered an opportunity to support the mission and vision of Perkins.
- Ms. Yarbrough informed the Committee that the next meeting of the Perkins Campaign Steering Committee would be March 4, 2020. Ms. Yarbrough added that Dr. Hill, Mr. Martin, and others would schedule appointments with key stakeholders to cultivate donor interest in theological education at Perkins as well as a commitment to the University and its vital role in the community.

Upon concluding her report, Ms. Yarbrough returned the floor to Mr. Cheves, who called upon Ms. Connie O'Neill to deliver the Simmons School of Education and Human Development update.

- Ms. O'Neill stated that the Simmons School priorities for the upcoming campaign would include endowment, annual scholarships, operational dollars for the Budd Center and the Partnership with Toyota and Dallas ISD to build a Pre-K – 8th grade STEM School in West Dallas.
- Ms. O'Neill stated that Simmons was pleased to be celebrating the First Anniversary of the West Dallas STEM School. Executive Board member Preston Butcher would provide a challenge gift to raise funds for scholarships that will support West Dallas STEM School teachers. Mr. Butcher encouraged all board

members to participate in this challenge.

- Ms. O'Neill stated that partnerships with corporations would continue to be a focus. She added that Toyota had been a great corporate partner to the University. The Simmons School plans to engage with other corporations in the area to support teacher education.
- Ms. O'Neill stated that the Simmons School had steadily increased in external funding from 2016 to 2019.
- Ms. O'Neill informed the Committee that the Simmons School Luminary Awards would be presented on March 12, 2020, recognizing the Girl Scouts of North Texas, Big Thought, and the Carnegie Foundation for the Advancement of Teaching.
- Ms. O'Neill announced that the next meeting for Simmons was scheduled for April 2, 2020. Dr. Stephanie Knight would meet with the campaign committee members as well as executive board members to talk about their involvement with the fundraising priorities.

Upon concluding her report, Ms. O'Neill returned the floor to Mr. Cheves, who called upon Mr. Bill Armstrong to provide the Athletics update.

- Mr. Armstrong commended the Athletic department on its recent achievements before proceeding further into the presentation.
- Mr. Armstrong stated that the Athletic Department's fundraising priorities over the past several years had been focused on operational/current-use needs and capital projects. The division expects these areas to continue to be the priorities in the next campaign.
- Mr. Armstrong informed the Committee that the capital projects that are on the horizon include a new facility that will serve as the home to the soccer and track and field teams. He added that Westcott Field will not move; however, this facility will replace the metal bleachers surrounding the stadium. Athletics also plans to complete the Robson & Lindley Aquatics Center by building an accompanying outdoor pool. In the near future, SMU would begin the design process for the next phases of the athletics master plan which includes a multi-purpose facility that addresses many of the department's needs as well as enhancements to Ford Stadium.
- Mr. Armstrong stated that from a current-use standpoint, Athletics' biggest area of need continues to be the Mustang Athletic Fund, which helps to cover all aspects of the athletics department budget, growing the Circle of Champions, and sport-specific fundraising through Excellence Funds.
- Mr. Armstrong stated that one of the major highlights from the fall was the grand opening and dedication of Armstrong Fieldhouse and the Indoor Performance Center. He added that this new multipurpose facility had already been used for a wide variety of events including football practice, band practice, the Distinguished Alumni Awards, Mustang Stampede, and many other activities. He also pointed out that the fundraising efforts for this facility exceeded the total cost of the project, ensuring that the construction was completely funded by donors.
- Mr. Armstrong announced that fundraising remained strong in Athletics. As of December 5, the Athletics Department accounted for almost one quarter of all money raised and commitments received university-wide during the quiet phase of the Campaign.
- Mr. Armstrong stated that fall of 2019 was been one for the record books. The SMU football team won 10 games for the first time since 1984, and went undefeated at home for the first time since 1968. Men's soccer would compete in the NCAA Tournament's elite 8 on December 5, 2020. Equestrian and men's golf were both ranked in the top 15 in the nation, and the men's basketball team remained undefeated.
- Mr. Armstrong informed the Committee that SMU was one of two programs in the country whose men's basketball team is undefeated and whose football team won 10 games. He noted that the only other team to achieve such a feat was Ohio State University.
- Mr. Armstrong stated that it was a busy time of year in the Athletics Department. He notified the Committee that the development team would be seeking help for postseason festivities and bowl

preparation before the end of the year. Mr. Armstrong informed the Committee that year-end solicitations, football ticket and Mustang Club renewals would be sent in the next two months. He added that Athletics would also prepare for the day of giving campaign in March.

Upon concluding his report, Mr. Armstrong returned the floor to Mr. Cheves, who turned the meeting back to Mr. Ford.

Mr. Ford called upon Mr. David Miller to provide a report on SMU's Endowment Giving.

- Mr. Miller stated that endowment giving, especially endowments naming schools and academic initiatives, faculty positions, and student scholarships, represented a significant portion of the last campaign, which could be seen in Mr. Cheves' report earlier in the meeting.
- Endowments, as permanent assets of the institution, allow SMU's academic and institutional leaders to plan ahead, knowing the distributions can be relied upon in perpetuity. Mr. Miller added that in the last campaign, Centennial Endowments, those that also included start-up operating funds, were the most helpful. Mr. Miller noted that the detailed list Mr. Cheves provided show the endowments that carry this "centennial" designation.
- Mr. Miller referenced the comments made by Mr. Cheves about the Campaign Leadership Council (CLC) planning process. The CLC reviewed SMU's current endowment minimum funding levels and was confident that the current minimums were at the appropriate levels, but planned to expand the list of funding opportunities to include new, higher levels. Mr. Miller added that the CLC would continue to encourage donors to provide operational start-up funding with each new endowment created.
- Mr. Miller noted that endowment giving to the campaign, as of November 30, 2019, exceeded \$83 million dollars. He pointed out that some of SMU's recent large announcements included endowment resources that had not yet been designated, so the

\$83 million number would significantly increase as those funds are applied to their final purposes.

- Mr. Miller informed the Committee that these endowment commitments to date funded 103 newly endowed scholarships and graduate fellowships, 5 newly endowed faculty positions and 13 newly endowed academic programs.

Upon concluding his report, Mr. Miller returned the floor to Mr. Cheves, who called upon Mr. Mike Boone to provide an update on Capital Giving.

Mr. Boone reported the following:

- Mr. Boone stated that the previous two campaigns have helped transform the SMU campus. He added that Mr. Cheves' statistics and lists were worth reviewing. Mr. Boone stated his report would focus on the campus improvements that have and would be taking place since the last campaign ended in December 2015. Mr. Boone noted that some of these were residual projects from the last campaign, while some have been funded and started since. Mr. Boone informed the Committee that all received contributions would apply to SMU's new campaign.
- Mr. Boone stated that SMU dedicated seven facilities since the end of the last campaign, including Harold Simmons Hall; Crum Lacrosse and Sports Field; Trinity Forest Golf; the IPC/Armstrong Fieldhouse; the Robson & Lindley Aquatic Center and Barr- McMillion Natatorium; the SMU Childcare Center; and the Dr. Bob Smith Health Center.
- In addition, Mr. Boone informed the Committee that SMU had two new facilities under construction: Gerald J. Ford Hall for Research and Innovation, and the Hillcrest Parking Center. Mr. Boone added that the University had three facility renovations currently underway: Hughes-Trigg Student Center; Owen Arts Center; and Bridwell Library.
- Mr. Boone announced that SMU would soon start planning the new Moody Hall as part of the Moody School announcement.
- Even with these facilities significantly funded, SMU would continue to welcome gifts to many of these projects, and there remains other facility enhancements under consideration as part of the new campaign.

Upon concluding his report, Mr. Boone returned the floor to Mr. Ford, who called upon Ms. Kelly Compton to provide an update on Planned Giving.

Ms. Compton reported the following:

- Ms. Compton recalled that in the past two campaigns, Planned Gifts represented significant portions of SMU's final total: 15% of the Time to Lead campaign (representing \$83 million), and 10% of the Second Century Campaign (representing \$110 million).
- Mr. Compton stated that donors remained increasingly sophisticated in their giving, so the University anticipates significant growth in the percentage of the next campaign coming in the form of Planned Gifts.
- As of December 5, SMU had already received significant gifts in the form of Planned Gifts. Ms. Compton stated that the University's Planned Giving donor group, the Dallas Hall Society, had already welcomed 46 new members, indicating 46 new households made a Planned Gift in this campaign.
- Ms. Compton announced that Planned Gift Commitments exceeded \$33 million. She added that this figure included revocable and irrevocable expectancies that had been quantified by the donor.
- Ms. Compton informed the Committee that planned Gifts that matured during this period totaled \$23.9 million, not all of which count toward the new campaign, as some of the original commitments were made during the last campaign.
- Ms. Compton stated that many universities were beginning to tighten their campaign accounting guidelines to reduce the value of some Planned Gifts when calculating campaign results. These types of discounted Planned Gifts include revocable bequests from younger individuals. The CLC would consider some new guidelines for Planned Gifts prior to the Campaign's public launch.

Upon Concluding her report, Ms. Compton returned the floor to Mr. Ford, who called upon Ms. Caren Prothro to deliver an update on Pony Power.

Ms. Prothro reported the following:

- In fall of 2017, SMU embarked on a three-year "bridge campaign" to engage donors in supporting funds that provide operational, or current-use support, to SMU. Ms. Prothro stated that this drive was named "Pony Power: Strengthening the Stampede" and brought together a stellar committee of volunteers representing each of SMU's seven schools, athletics, students, faculty and staff and alumni. Each year, the Pony Power Committee worked hard to achieve its annual goals and exceeded those annual goals.
- Ms. Prothro informed the Committee that as of November 30, 2019, donors contributed \$14,452,731 in current-use revenue to SMU, or 29% percent of the fiscal year goal and raised more than 81% of the initiative's three-year, \$150 million goal.
- In the previous fiscal year, several one-time gifts and pledge payments helped SMU achieve its goal. As a result, the University had some ground to cover this fiscal year to reach its \$50 million goal.
- Ms. Prothro and Mr. Sewell convened with this group bi-annually basis and would reconvene the entire committee in February 2020 to discuss results and strategies for the remainder of the fiscal year.

Upon concluding her report, Ms. Prothro returned the floor to Mr. Ford, who called upon Mr. Ray Hunt to provide an update on Special Projects supported by the new campaign.

- Mr. Hunt commented on how remarkable the meeting had been in terms of the level of engagement and activity evidenced by all the reports.
- Mr. Hunt informed the Committee that there had been several notable gift announcements in the last several months, indicating that SMU's momentum was building. Mr. Hunt thanked everyone who provided financial support, leadership, and hard work to make these remarkable accomplishments possible.
- Mr. Hunt focused his remarks on the most recent announcement by the Moody Foundation and its \$100 million commitment to establish the Moody School of Graduate and Advanced Studies at SMU. Mr. Hunt added that this new school would provide a whole new level of opportunity for SMU's graduate and Ph.D. degree programs, for faculty research, and for interdisciplinary activities among all the schools.
- Mr. Hunt stated that this commitment would endow the Moody Deanship, Graduate Fellowships,

Ph.D. Dissertation Fellowships, and Faculty Fellowships; establish the Moody Research Incubator; support interdisciplinary efforts, including capital and research initiatives; and support the construction of a new Moody Hall.

- Mr. Hunt noted that the way the gift is structured is incredibly insightful, as it would include endowment and capital support, as well as significant operating support.
- Mr. Hunt expressed that the University was not only grateful to the Moody family for the financial support, it was also grateful for the message it sends to the national education community that SMU is serious about its graduate and research initiatives.

Upon concluding his report, Mr. Hunt returned the floor to Mr. Ford, who called upon Mr. Bob Dedman, chair of the SMU Board of Trustees, to deliver the closing remarks.

- Mr. Dedman thanked the Committee for their service on behalf of the Campaign Leadership Council. He stated it could be seen in the meeting that SMU was creating tremendous momentum for the next campaign and engaging donors in impact ways like never before.
- Mr. Dedman stated that each celebration had resulted in energy and attention, and SMU's national reputation had never been better.
- Mr. Dedman thanked SMU's donors, academic leadership, staff leadership, and President Turner for bringing SMU to this point of opportunity, and for leading the University forward as it prepares for the next campaign.

Upon concluding his report, Mr. Dedman returned the floor to Dr. Turner for closing remarks.

- Dr. Turner recalled the number of reports on projects, aspirations and results mentioned throughout the course of the meeting. He stated that SMU had received tremendous support throughout the fall, which was heavily celebrated during the meeting. He added that Pony Power continued to engage with thousands of supporters, SMU's winning athletics teams resulted in nationwide recognition, and the University had demonstrated success in achieving significant portions of its Strategic Plan.
- Dr. Turner stated that this commitment to do more, added to SMU's national reputation and recognition.
- Dr. Turner was pleased to announce that commitments to SMU's new Campaign totaled \$452,715,715.

- Dr. Turner directed the Committee's attention to Tab F, which provided a current campaign pyramid of commitments. He pointed out that the total represented over 80% of the entire amount raised in the entire first campaign, and over 38% of the entire amount raised in the entire second campaign before going public.

Upon concluding his report, Dr. Turner returned the floor to Mr. Ford for adjournment.

- Mr. Ford stated that the Committee must remember that campaign planning is more of a marathon than a sprint. He added that SMU will have a lot of hard work ahead if it is to meet and exceed the notable success it has achieved before. The University will want to include scores of new donors, broaden its base and continue to break records. With the aid of the Committee, SMU is confident in its success.

Mr. Ford thanked the Committee members for their attendance and the meeting was adjourned.

**Meeting of the Campaign Executive Committee
May 7, 2020, 11:15 am**

MEETING MINUTES

At 11:15 am, Mr. Brad Cheves called the meeting to order.

Mr. Cheves provided instructions regarding the functionality of Zoom software and offered assistance, if needed, with accessibility of the meeting packet. Mr. Cheves then called upon Mr. Gerald Ford to welcome the committee and make introductions.

- Mr. Ford welcomed the Campaign Executive Committee to the second meeting for SMU's upcoming new campaign. Mr. Ford stated that the Campaign Executive Committee was composed of members of the Campaign Leadership Council along with the co-chairs of the Campaign Steering Committees. Mr. Ford thanked the committee for its service during the planning phase of the new campaign, and for participating in the day's meeting via Zoom.
- Mr. Ford pointed out that the committee was also joined on the call by the members of the President's Executive Council, the academic deans, and the Director of Athletics. Mr. Ford also stated that the committee was joined by the staff leadership of Development and External Affairs as well as the Directors of Development who supported the Campaign Steering Committees.
- Mr. Ford said that the current conditions of the nation and world were impacting plans for the new campaign. SMU was focused on immediate concerns, but that necessary focus was not a sign of abandoning its longer-term vision for the University, which was supported by the campaign that would be launched in the coming months. Mr. Ford recalled that the campaign included all financial contributions to any area, including contributions to immediate needs, year in and year out. It was important that the committee's work continued apace during this planning period, especially in the current climate.

Mr. Ford called upon Dr. R. Gerald Turner for the President's report.

- Dr. Turner stated that when the committee met last December at the Bush Presidential Center, they could not have anticipated what spring would bring. The university was coming off a historic semester, with record-setting gifts from David Miller and the Moody Foundation; with a launch of a new strategic plan in Lyle School, supported by Bobby Lyle; with the dedication of the IPC and Armstrong Field House; and with the beginning of renovations on Owen Arts Center, just to name some of the most visible projects. The Ford Hall and the Perkins Parking Center was coming to fruition, among other projects. Since the committee's last meeting, even with the COVID-19 challenge, the university continued to receive commitments at all levels, supporting Pony Power, special projects, endowments, planned gifts, capital projects, etc. Included in those new commitments were four new commitments at the principal gift level:
 - Anonymous, *Anonymous* Endowment and Current-use, Meadows School
 - Joe Hardt and Marie M. Park, The Martha and John Wesley Hardt Endowment for the Center for Preaching Excellence Fund, The Bishop John Wesley Hardt Endowed Scholarship Fund
 - Ashlee Hunt Kleinert and Chris Kleinert, Dedman College Scholars Program and The Embrey Human Rights Program Endowment Fund
 - Ray W. Washburne, Washburne Soccer and Track Stadium
- Dr. Turner expressed gratitude that those donors had continued to support important programs at the University. Dr. Turner said that even so, the immediate focus has necessarily shifted. Dr. Turner was gratified by the outpouring of support and concern for SMU from committee members, as expressed by participation in the CSC meetings this spring. Dr. Turner stated that it was ironic there was the strongest attendance ever at the latest series of meetings. Dr. Turner was seeing the same thirst for information from the university's other committees, like the Alumni Board. SMU remained on the minds of its supporters and friends, students and their families, faculty, and staff. Dr. Turner stated that no one would be surprised to learn that the faculty and staff have more than risen to the occasion, providing distance learning, changing schedules and operations, working from home, etc., all the while caring for their health and that of their families and neighbors. But faculty and staff were eager to get back to work on campus and hoped to do by June 1 if possible.
- Dr. Turner stated that it was most important that the university was single-minded in its focus to open the campus to students in the fall – beginning with commencement, which was moved to August. Dr. Turner had created a task force to prepare for SMU's reopening and to identify the ways it can do so safely, and without losing the special SMU characteristics of its academic programs and student experiences.

- Dr. Turner said that the committee might have wondered what a campaign had to do with the world's challenges, at that moment. Dr. Turner thought that it was somewhat ironic that at times like these, those who care deeply about SMU wanted to help the University as a way of addressing the needs around them. They wanted to see SMU generally, and its students and faculty in particular, thrive in their endeavors. Nobody wanted to see the students of 2020 lose their opportunities to excel and to launch lives of productivity and positive impact. This was what the university was committed to do, and that was what the campaign was supporting, through immediate efforts like Pony Power, and through the continued commitment to longer-range goals.
- Once SMU was back humming, the campaign's signature projects would come to the forefront again. Dr. Turner asked the committee to keep its planning underway, continue to cultivate and to reach out to prospective donors and student recruiters. SMU was continuing its messaging and publications and postings, and together, hopefully sooner than one might think, it would be back into the specific business of launching and conducting SMU's third successful campaign, and doing the important work of the university.

Dr. Turner turned the floor over to Ms. Caren Prothro and Mr. Carl Sewell for an update on the Pony Power Initiative.

- Mr. Sewell started by stating that *Pony Power* had been a truly remarkable initiative over the last three years. When the cumulative \$150 million-dollar goal in April of 2017 was announced, he knew it would be a daunting task. But from the beginning, the success was notable and it had proven to be an important source of consistent revenue, especially during times of uncertainty like the global pandemic everyone was facing.
- Mr. Sewell pointed out that the initiative's overall progress was reflected in the printed materials through March 31. However, as of April 30 SMU supporters had contributed \$39,439,815 dollars for current-use purposes this year, and \$149,747,188 over the entire drive. Because Pony Power exceeded its revenue goals in both fiscal years 2018 and 2019, its final three-year, \$150 million-dollar goal was only \$252,812 dollars away. Mr. Sewell was highly confident that the payments on outstanding pledges will enable us to exceed the cumulative goal. Additionally, many of the schools were on track to meeting their individual fiscal-year goals as well. Even during the economic downturn, alumni, parents and friends had stepped up to support the immediate needs of this institution. Mr. Sewell was truly grateful for that support.

Mr. Sewell called upon Ms. Prothro to provide her perspective.

- Ms. Prothro stated that when Pony Power was started, there were at least three objectives:
 - First, to create a continuing engagement with volunteers and donors, following the conclusion of the Second Century Campaign;
 - Next, to ensure a minimum of \$50 million per year for current-use needs – the equivalent of a living endowment of \$1 billion; and
 - To engage in new ways the members of the school and unit Executive Boards in the fundraising initiatives of the University.
- Because of the committee's help and generosity, there was success on all fronts.
- Ms. Prothro took a moment to thank each of the school, unit and constituency representatives from the previous drive, all of whom have agreed to continue their efforts going forward. Ms. Prothro stated that she and Mr. Sewell truly enjoyed working with the committee over the past three years.

Ms. Prothro returned the floor to Mr. Cheves for the Campaign Steering Committees Update.

- Mr. Cheves said that the time and format of the day's meeting did not allow for separate reports from each Campaign Steering Committee. Mr. Cheves pointed out that behind Tab D of the packets were reports from each committee showing the status of their area of focus, the membership of their committees, recent

events and activities, and their highest funding priorities. Mr. Cheves asked that the committee read through these reports to see how impressive the level of engagement had been, even in the unusual period.

- Mr. Cheves said that from a fundraising staffing standpoint, he was pleased to announce that 5 new Directors of Development for School and Project Development were hired. The university recruited excellent talent from a variety of other universities. All of these new officers had worked in private and public institutions and came to SMU with extensive fundraising experience. The new hires would serve in the following schools: Simmons, Lyle, Dedman and two officers would focus on University Programs which included Student Affairs, Libraries, SMU-in-Taos and other university-wide initiatives. This put the Campaign Steering Committees and special Task Forces at full staffing.
- Behind Tab E was the cumulative list of commitments of \$1 million or more. Mr. Cheves said that the committee may be interested to know that these commitments accounted for \$377,043,269, or 77% of the campaign total.
- Mr. Cheves pointed out that the material behind Tab F showed the total commitments to date. Mr. Cheves was pleased to announce to the Board tomorrow that campaign commitments exceed \$488.3 million at that time.

Mr. Cheves turned the floor over to Dr. Turner for concluding remarks, to be followed by Board Chair Bob Dedman.

- Dr. Turner said that there were some points from the reports from the day that he'd like to expand on. Dr. Turner stated that when Mr. Cheves mentioned the impact of the Principal Gifts donors on the total amount raised, he made a valid point that, in terms of dollars, the largest impact was at the top of the gift pyramid. But another interesting perspective was that while there are 65 donors at that level, there were another 24,967 donors to the campaign under \$1 million. That meant over 25,000 donors had already participated in that phase of the campaign, at all levels. Dr. Turner was encouraged that so many of the SMU family were with the university at this challenge time.
- Dr. Turner had another point to make relating to Pony Power. Pony Power couldn't be overestimated in its value in keeping donors and volunteers engaged over the past three years. The revenue generated each year was critical, but keeping the base expanding was going to help in the long term. We also cannot overestimate the importance of having two leading trustees over the effort. That elevated its importance and visibility and made Pony Power a priority, day in and day out.
- Dr. Turner stated that the university was in challenging times, both for students and the institution as a whole. This is when everyone needed to double down and intensify outreach, not to retrench and wait for its future to be determined by fate or by others. Dr. Turner said that was why he and the Board were committed to one goal – opening SMU in the fall. That would require courage and creativity, and it would require solving some of the financial challenges of the university's students, both returning and new.
- Dr. Turner announced that Caren and Carl had offered to sign up for another year, to lead through a fourth year of Pony Power – but importantly an expanded Pony Power called Pony Power Plus. That name indicated that the initiative would reach the normal Pony Power goal of \$50 million divided among schools and areas, but importantly, the "Plus" would be added – a goal of extra funds to be used by the university to fill its undergraduate class. The economic impact of the pandemic on students' families had already been seen and SMU was in hot pursuit of those returning students, as well as a quality entering first year class. These extra "plus" funds would be needed for up to four years to support these students by easing their economic challenges.
- To support this initiative, a Presidential Fund for Immediate Need was created – a place where donors could contribute to meet the financial needs of these students, at this unique time. We're seeking contribution "units" of \$50,000 or \$100,000, and we'll take those in multiples of one or more! Of course, donations of any size were welcome, but we're hoping to quickly gather larger sums.

- Dr. Turner stated that he would announce it to the full Board tomorrow but he knew the committee would be leading the charge and would want to be informed in advance.
- Dr. Turner thanked Mr. Sewell and Ms. Prothro for their commitment to Pony Power and to these expanded efforts. SMU was grateful to have them agree to this extra duty, just as it was lucky and grateful to have each committee member in service to the university.

Dr. Turner turned the floor over to Mr. Dedman to provide his perspective.

- Mr. Dedman added the thanks of the full Board for the committee's efforts over the past several months, especially when members had multiple concerns personally and professionally. Mr. Dedman said they would all get through the current situation because SMU was here for the long haul.
- Mr. Dedman quoted Dr. Turner quoting Dr. Hyer, SMU's first president, who said "Universities do not grow old, but live from age to age in immortal youth." That provided a perspective that gives hope, and challenges everyone to develop SMU for future generations. The current challenges would pass with time, and the committee would emerge more vibrant and readier to act on its vision for SMU's continuing national ascent.
- Mr. Dedman stated that the Board was grateful for the committee's engagement, its advocacy, and support. He looked forward to fall, and to having everyone back together on campus.

Mr. Dedman returned the floor to Mr. Ford for remarks and adjournment.

- Mr. Ford said that before the meeting was adjourned he would like to underline that during the especially important next 90 days, the committee staid focused on the enduring mission of the University – to provide students with every opportunity to be successful in their future endeavors. This meant, at that point, ensuring that students were provided with the means to return to campus or to join the entering class. Mr. Ford thanked the committee in advance for its support of that global priority which would benefit everyone. Mr. Ford lastly stated that there could be no more important task, and it was one that future generations would thank them for achieving – that of preserving the unique on-campus SMU experience for its students.

Mr. Ford then adjourned the meeting.

Meeting of the Campaign Executive Committee December 3, 2020, 9:00 am, via Zoom

MEETING MINUTES

At 9:00 am, Mr. Brad Cheves called the meeting to order.

Mr. Cheves provided instructions regarding the functionality of Zoom software and offered assistance, if needed, with accessibility of the meeting packet. Mr. Cheves then called upon Dr. R. Gerald Turner to welcome the Committee and make introductory remarks.

- Dr. Turner welcomed the Committee members to the third meeting of the Campaign Executive Committee for SMU's upcoming new campaign. Dr. Turner said the Campaign Executive Committee is composed of members of the Campaign Leadership Council along with the co-chairs of the University's Campaign Steering Committees. A complete committee roster is provided behind Tab A of the meeting materials, and minutes of the May meeting are provided behind Tab B. Dr. Turner thanked the committee members for their service during this planning phase of the new campaign, and for participating in today's meeting via Zoom.

- Dr. Turner noted that also on the call were members of the President’s Executive Council, academic deans, and the Director of Athletics.
- The staff leadership of Development and External Affairs and SMU’s Directors of Development who support the Campaign Steering Committees were on the call as well.
- Dr. Turner noted he attended each of the Campaign Steering Committee meetings over the course of the semester and the University was fortunate to have a productive summer and fall, even with COVID challenges.

Dr. Turner moved to the topic of Campaign Activity.

- This fall there were special announcements, some with events, and some communicated through publications and emails. These major announcements have added significantly to the current total, which will be announced later in the meeting.
- There were over a dozen Campaign Steering Committee meetings over the summer and fall, Dr. Turner was thankful for the participation and noted that it was likely some of the highest attendance given the convenience of Zoom.
- Dr. Turner said he and the campaign co-chairs have reviewed proposals for the marketing of the campaign, in terms of theme and logo, and there will be some concepts that will provide energy and enthusiasm at the time of the campaign’s public launch.
- Dr. Turner noted Brad and his team have continued to work through the lists of prospects, some of whom have been solicited and some of whom are being cultivated. Dr. Turner was convinced there were no shortage of prospective donors, but they need to be deliberately contacted, even in the current COVID environment.

Dr. Turner moved to the topic of continuing programs and activities.

- Dr. Turner said SMU was determined to keep operations running, especially in terms of on-campus classes. It was important to the community and to the campaign that outreach and engagement programs continue. The Tate Series continued, and the University kept its commitment to holding signature events, providing virtual elements. The events included the Cox100 Gala and the Distinguished Alumni Award banquet, among others. Of course, football and basketball continue as well.
- The important work to better SMU continued – this fall the nation focused on issues related to Black Lives Matter, and SMU recommitted itself to creating an environment where Black students, faculty, staff, and alumni – and all underrepresented groups – are welcome, supported, and respected. Dr. Turner held a series of town halls to hear the perspectives of these groups, and SMU appointed its first Chief Diversity Officer. Dr. Turner continues to work with the Forum to find ways to address not only the concerns of these constituents, but the opportunities to help them succeed as SMU Mustangs, while also enriching and improving the campus environment for all the SMU family.
- Looking forward, the fall commencement will be on December 19, currently planned to take place in Ford Stadium given the University’s safe and successful commencement last August
- The spring calendar has been modified to minimize travel and return to campus – this includes eliminating spring break, so students do not leave and return *en masse*.
- Dr. Turner provided an update you on campaign progress. 74 principal gifts of \$1 million or more have been received since the quiet phase began, listed in Attachment C. Since the May meeting, SMU has received 12 new Principal Gifts:

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| Anonymous | Planned Gift adding to Endowed Faculty Position, Perkins School of Theology |
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| Jane R. and Pat S. Bolin '73 | Bolin-Bridwell Hall, Cox School |
| Gina L. Bridwell and Tucker S. Bridwell '73, '74 | Bridwell Institute for Economic Freedom, Bolin-Bridwell Hall (Cox School) |
| Carter Creech '60, '63 | Middle School College and Career Readiness Program |
| Linda Wertheimer Hart '65 and Milledge (Mitch) A. Hart, III | The Hart Center for Engineering Leadership |
| Aurelia C. Heppner and Brad K. Heppner '88 | Heppner Family Commons, Faculty Research (Cox School) |
| Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 | The Nancy Ann and Ray L. Hunt Leadership Scholars Program |
| Lilly Endowment, Inc. | Theological Congregational Ministry |
| Shelli Mims Lindley and Steven J. Lindley '74 | Aquatic Center – Phase II |
| Bruce A. Robson '74 and Emily K. Robson | Aquatic Center – Phase II |
| Gay F. Solomon and William T. Solomon '64 | Caren and Vin Prothro Organ, Perkins School of Theology |

- Dr. Turner said the Committee should be very proud of the continued momentum in calendar 2020. Dr. Turner stated it was remarkable, even with all the challenges and changes, that donors continue to see ways to help SMU in the short-term while supporting the vision and Strategic Plan for SMU's future.

Dr. Turner called upon Mr. Carl Sewell for the Pony Power Plus update.

- Mr. Sewell stated *Pony Power's* original drive ended May 31, 2020 with \$156,668,625 dollars raised cumulatively for current-use funds during its three fiscal years. However, as the pandemic emerged this spring, there was a pivot to focus on providing a baseline of \$50 million dollars in annual support plus an additional \$2 million dollars in commitments to assist incoming and returning students with needs exacerbated by COVID-19. That's why the *Pony Power Plus* initiative was developed for the 2021 fiscal year.
- Since last spring, donors have committed over \$2.1 million dollars towards the added effort. The creation of the Presidential Fund for Immediate Needs (PFIN) afforded the opportunity to respond quickly to some acute challenges related to recruiting and retaining students. This will continue to be a priority as another recruitment period approaches. While PFIN continues to provide the strongest avenue for this emergency support, other funds exist that can help bridge the gaps for specific populations. There is still a goal of \$50 million to cover operational priorities that drive SMU forward.
- As of October 31, donors have contributed more than \$14.1 million towards current use initiatives as SMU. This amount is about a 14% increase over this time last year. The largest growth has been in the area of general university priorities, which includes PFIN.
- This month, *Pony Power Plus* representatives from many schools and units have focused their attention on ensuring each member of their executive board supports this year's current use giving effort. In the spring, committee liaisons will redirect their attention on raising money for their school and unit-specific SMU Funds as well as other operational funds that need support.
- This spring, the *Pony Power* Committee will continue to brainstorm on how to maximize the volunteer efforts surrounding this important drive so it fits cohesively into the upcoming campaign. Mr. Sewell thanked each *Pony Power* Committee member present today for their continued leadership.

Dr. Turner then called upon Mr. Cheves to lead the Campaign Steering Committees through their semi-annual activity reports. Mr. Cheves then called upon Ms. Jean Phillips to provide an update from the National Campaign Steering Committee.

- Ms. Phillips said the charge of the National Campaign Steering Committee (CSC) is to build, strengthen and engage the national and international SMU alumni, parent and friend network through in-person and regional solicitation and engagement methods.
- In the Second Century Campaign, the National Campaign program was comprised of multiple regional based city committees which were both time and staff intensive.
- Going into this new campaign, the National Committee has re-tooled its volunteer model to have individual committee members from identified priority markets populate Committee. Currently, the National Campaign Committee is led by the following Co-Chairs:
 - Jeanne Phillips – Convening Co-Chair
 - Scott McLean – Co-Chair
 - Marty Flanagan – Co-Chair
 - Richard Ware – Co-Chair
 - Ed Wilson – Co-Chair
- Since the last CEC meeting, the COVID-19 pandemic has halted the ability to visit with donors in their national markets, particularly outside of Dallas, but this hasn't stopped DEA leadership and team members from executing outstanding communication and solicitation strategies towards our potential donors.
- The Directors of Development, Major and Leadership Gift Officers, and other DEA staff have been Zooming, emailing, and phoning with current and potential supporters for the entirety of the pandemic which has resulted in a multitude of renewed and first-time major gifts.
- In the last campaign the state of Texas, especially Dallas and Houston, contributed the preponderance of the \$1.1billion, so this will ensure Houston is an area of focus. Ms. Phillips added there were significant gifts from individuals and institutions across the US and around the globe. Solicitations in Houston and beyond will be focused on six, seven, and eight figure prospects in those regions.
- Currently, the National CSC members are reviewing their previous national strategies, identifying the right markets for national campaign rollout events and activities, while also building potential donor networks with in-region leaders with the purpose of generating philanthropic conversations.
- Ms. Phillips asked the Committee for recommendations of key leaders who would be ideal members of the National Campaign Committee, and to pass those names along to Blake Davis, Assistant Vice President for Principal and Major Gifts.

Mr. Cheves called upon Mr. Tucker Bridwell to provide an update from the Cox School of Business Campaign Steering Committee.

- Mr. Bridwell said he was pleased to be at the meeting today to represent the Cox School of Business Campaign Steering Committee with fellow co-chairs Kyle Miller, Mark Plunkett, and Kirk Rimer.
- A few weeks ago, the Committee learned of the passing of the Cox School of Business' esteemed benefactor, Edwin L. Cox, Sr. He passed away at the age of 99. At the Cox100 Gala in October, the School bestowed upon Mr. Cox the first-ever Visionary Award. Mr. Cox will be greatly missed.
- Mr. Bridwell stated it had been an exciting fall semester with announcements of multiple gifts to support Cox, including one from him and his wife Gina to create the Bridwell Institute for Economic Freedom, a gift from Aurelia and Brad Heppner to name the Heppner Commons in the Cox renovation and expansion

project, and a gift from Jane and Pat Bolin. Mr. Bridwell said he joined with Mr. Bolin to name the Bolin-Bridwell Hall in the Cox renovation and expansion project.

Mr. Bridwell moved to the topic of Fundraising Initiatives.

- The Cox School Committee continues to focus on raising money for the Cox renovation and expansion project. The total needed for the project is \$117M. 80% of that (\$93.6 million) is needed to break ground. The goal date to break ground is in May 2021.
- Pony Power, led by Kirk Rimer, continues to be successful. Cox raises approximately \$7M a year in operating gifts and plans to continue throughout the campaign. \$24.9 million has been raised to date.
- Scholarships are growing in importance to ensure the University is able to recruit and retain top-tier students. The Cox School Committee's goal for the campaign is to raise \$50M in scholarships to support both undergraduate and graduate programs.

Mr. Bridwell moved to his final topic of Fundraising Updates.

- Mr. Bridwell noted that Cox has raised a total of \$128,366,280 towards the campaign. In the entire last campaign, Cox raised a total of \$102M. The last campaign's results have been surpassed and Cox plans to continue the momentum supporting all of the Cox priorities.

Mr. Cheves called upon Ms. Liz Armstrong to provide an update from the Dedman College Campaign Steering Committee.

- Ms. Armstrong was pleased to be at the meeting to represent the Dedman College Campaign Steering Committee, composed of herself, along with fellow co-chairs Ashlee Kleinert and Jon Altschuler. Mr. Altschuler also serves as the co-chair for Pony Power and the chair of the College's Executive Board.
- This semester has been an exciting one for Dedman College. Increased engagement with the Executive Board has been a main priority and resulted in having Zoom meetings once a month focusing on a current event or topic that the Dedman faculty specialize in.
- In addition, the fundraising efforts for the College have seen success despite the pandemic. Partners from all over the country have been giving selflessly to invest in Dedman College's students. Over \$750,000 has been committed to the College in new gift pledges via estate planning, a new endowment is being created in the Human Rights Program for travel abroad opportunities, and three new scholarships are being finalized – two of which benefit the Dedman College Scholars Program.

Ms. Armstrong moved to the topic of Fundraising Initiatives.

- In April, the Dean collaborated with the Development Office and created six fundraising initiatives that would create a clear path towards accomplishing the university's R1 initiative.
- One of the most successful Pony Power initiatives is the Dedman College Scholars Program. Due to the generous support of Carl Sewell, the College was able to form "The Sewell Challenge" where gifts were matched 1:1 with a goal \$400,000. Today, 83 students hold the esteemed title of Dedman College Scholar.
- The SMU Human Rights Program is a crown jewel of both Dedman College and the University. As one of only seven institutions in the country to hold such a program, SMU has positioned itself to be a leader within the field by transforming the lives of students through important classroom study, research, and study abroad experiences.
- Lastly, Dedman College has two endowments which are vital for the success of the campaign's R1 initiative and will immediately provide a quality-of-life enhancement for our faculty, staff, and students.

- An endowed deanship will provide perpetual financial support for emerging Dedman priorities administered by the current and future deans of Dedman College.
- Graduate students are key to cutting edge research across campus and play a vital in the research productivity and innovation of the university. Establishing a centralized fund to administer aid for graduate student will ensure our success in our R1 initiatives.

Ms. Armstrong moved to the topic of Fundraising Updates.

- Pony Power Plus continues to be a method by which donors can contribute gifts of all sizes to Dedman College. Ms. Armstrong anticipates the fundraising goal will be achieved in the remaining months of this fiscal year.
- As seen in the pie chart in the presentation, the campaign objectives for Dedman College are focused on both endowment and operational dollars. Over \$21 million dollars has been raised and the Campaign Steering Committee will continue to work closely with DEA and the Provost on finalizing initiatives.

Mr. Cheves called upon Mr. Jim Baldwin to provide an update from the Dedman School of Law Campaign Steering Committee.

- Mr. Baldwin was pleased to be at the meeting to represent the Dedman School of Law Campaign Steering Committee, composed of himself and fellow co-chairs David Huntley and Amy Ware.
- Mr. Baldwin was happy to report good news from the Dedman School of Law. In spite of the pandemic, the School welcomed the most diverse and academically talented class of first year law students in many years.
- The School has also seen a very generous response from the Dedman Law community. Since March 2020, the law school has received just over \$1.M in new commitments. This includes significant gifts to the student loan emergency fund, and scholarship funding for students experiencing unexpected financial uncertainty.
- The law school clinics program launched a COVID-19 helpline this summer to assist people in the Dallas community who were facing eviction and employment issues. The helpline also provided students the opportunity to gain valuable legal experience.

Mr. Baldwin moved to the topic of Fundraising Initiatives.

- **The Child Advocacy Clinic** educates law students in a hands-on clinical education setting to provide representation to children who have been removed from their homes due to abuse and neglect. Over the life of the Clinic, student lawyers have represented more than 225 child clients. The Clinic's current source of funding ends this year, and the Dedman School of Law is seeking additional funding to maintain this important work.
- **Center for Public Interest Law** - A new Public Interest Center would focus on strategic career planning and specialized curricular training for students interested in public service careers such as with a district attorney's office, the justice department, and non-profit organizations. Research shows an interest in public service is the primary reason students attend law school. Having such a Center will help recruit talented students and remain competitive.
- **Scholarships** – The goal for scholarship funding represents a combination of endowment and operating funds, over the course of a campaign. Funding for student scholarships will always be a top priority of the law school. The cost of a legal education continues to escalate and the law school's ability to recruit top students and reduce their debt burden is critical to staying competitive. Additionally, the law school wants to offer scholarships for diverse and first-generation students.

Mr. Baldwin moved to the topic of Fundraising Updates.

- Pony Power Plus provides operational support for the law school to fund initiatives such as the recently launched Career Closet and the COVID-19 Helpline. The law school is over halfway to its fundraising goal and Mr. Baldwin was confident the law school will finish the year strong. Thus far, the Dedman School of Law has raised just over \$12M in the campaign.

Mr. Cheves called upon Dr. Bobby Lyle to provide an update from the Lyle School of Engineering Campaign Steering Committee.

- Dr. Lyle was pleased to be at the meeting to represent the Lyle School of Engineering Campaign Steering Committee, which is also composed of fellow co-chairs Rich Templeton, Hilda Galvan, and Pony Power chairperson Michael Sullivan.
- Dr. Lyle said this semester has been an exciting one for Lyle. The school has made headway on achieving fundraising goals laid out in its Strategic Plan, titled *Engineering with Impact*. Despite the pandemic, Lyle has received continued financial support for scholarships, research initiation funding and Lyle's centers, institutes and key facilities including the Deason Innovation Gym, otherwise known as the "The DIG."
- In response to the pandemic, DIG staff and students produced more than 3,000 medical grade face shields for local health care facilities including Parkland and UT Southwestern hospitals at a time when personal protection equipment was nearly impossible to source. Regional news channels featured the project, providing positive press for the DIG, Lyle, and SMU.

Dr. Lyle moved to the topic of Fundraising Initiatives.

- Incorporated within *Engineering With Impact* are multiple fundraising initiatives including the three featured on the current slide in the meeting's presentation.
- Scholarships, Fellowship and PhD Support remain a top priority to attract talent capable of increasing research expenditures. Lyle's campaign goal for scholarship, fellowship and PhD support is \$20.5 million in endowed funding with \$1.575 million in operating dollars.
- Another important campaign focus consists of Lyle's Core Values as exhibited by its Centers and Institutes, including the Hunt Institute for Engineering and Humanity and the Hart Center for Engineering Leadership. The Center and Institute goal is \$12 million in endowed funding and \$600,000 in operating dollars.
- Research Initiation Funding remains an important piece to bridge the gap between conceptualization and implementation. This fund allows ideas to mature to the point where they are likely to attract sustained external funding for high-potential early-stage research projects within Lyle. The School aims to raise \$5 million in endowed funding and \$250,000 in operating dollars.

Dr. Lyle moved to the topic of Fundraising Updates.

- Over the past three years, Lyle has raised 118% of its \$7,250,000 Pony Power goal for a total of \$8,608,503. Dr. Lyle thanked Mr. Mike Sullivan for his leadership as Pony Power chair. In fiscal year 2021, Lyle has reached 17% of its goal and expects to reach 100 percent by year end.
- As seen from the featured pie chart, Lyle continues to raise both endowed and current use dollars. Since the silent phase of the campaign began, the School has raised over \$14 million and continues to work closely with University Leadership to achieve the goals laid out in Lyle's strategic plan and to support SMU's path to R1.

Mr. Cheves called upon Ms. Jennifer Altabef to provide an update from the Meadows School of the Arts Campaign Steering Committee.

- Ms. Altabef was pleased to represent the Meadows Campaign Steering Committee, along with fellow co-chairs Sarah Perot, Peggy Sewell, and Marvin Singleton.
- Like many other schools, the global health crisis pushed Meadows to explore the best way to host events. This fall, the Meadows School of the Arts launched a season of virtual concerts, performances, and lectures.
- More than 6,000 alumni, parents, and friends have tuned in for the 57 virtual events to date. The event series will continue into the spring, and Ms. Altabef invited the Committee to attend some of the school's virtual events.

Ms. Altabef moved to the topic of Fundraising Initiatives.

- Three themes of the campaign for Meadows are: People, Centers of Excellence, and Capital Improvements. Ms. Altabef highlighted three initiatives within those themes:
- **Owen Arts Center** - To be successful, the Meadows School must have facilities that reflect the quality of the people and work that goes on inside. In November 2019, the school kicked off the long-awaited renovation of the north wing of the Owen Arts Center. This phase of construction will modernize and improve the academic spaces for visual art, art history and creative computation, while transforming exterior entrances. Thanks to the leadership of Ms. Caren Prothro, the School has raised \$30.7 million to date, which is 90% of fundraising goal of \$34 million.
- **Meadows Museum Art Acquisitions** - Mr. Al Meadows' gift of his Spanish art collection to SMU has been an important cultural and educational asset for the University. Expanding the collection with art acquisitions elevates the Museum's and SMU's place on the international stage. Donations for acquisitions are matched dollar-for-dollar by The Meadows Foundation.
- **Scholarships** - Scholarships are essential to recruiting artistically and academically talented students. In response to the financial crisis and the need to increase access for underrepresented populations, a new scholarship program was launched over the summer called the Meadows Impact Scholarship Fund. This new fund enables the school to award promising Meadows undergraduate and graduate students with vital financial assistance.

Ms. Altabef moved to the topic of Fundraising Updates.

- Pony Power Plus continues to provide operational support for the Meadows School and Meadows Museum. The Meadows School has raised nearly \$34 million in this campaign thus far.

Mr. Cheves called upon Ms. Julie Yarbrough to provide an update from the Perkins School of Theology Campaign Steering Committee.

- Ms. Yarbrough was pleased to represent the Perkins School of Theology Campaign Steering Committee, also co-chaired by Joe Hardt and Dodee Crockett.
- There were number of notable gifts to Perkins this summer and fall:
 - Bill and Gay Solomon gave \$1 million toward the Perkins Chapel Organ.
 - An anonymous donor gave \$500,000 in operational scholarship funding, which is sorely needed.
 - Another anonymous donor informed the Committee of a large planned gift which will be used for endowed scholarships.

Ms. Yarbrough moved to the topic of Fundraising Initiatives.

- Ms. Yarbrough and the Perkins School were pleased that a substantial remodel of the Perkins Chapel facility has already been accomplished in the campaign due to the many worship services, University events, and weddings that take place there. However, the school still needs another \$1 million to finish the Caren and Vin Prothro Organ project, spearheaded by Gay and Bill Solomon's gift.
- Scholarship aid is vital to the success of Perkins. The School is seeking to raise millions of dollars in endowed and operational scholarships over the course of the campaign. Some of those funds will be in the form of planned gifts.
- In addition, there will be more scholarship programs similar to the highly successful Perkins Scholars program, to attract high level students with leadership skills and potential.

Ms. Yarbrough moved to the topic of Fundraising Updates.

- The previously mentioned anonymous gift of \$500,000 has propelled the School forward in operational funding, which is led by Pony Power co-chair Dodee Crockett. The Executive Board is rallying to the School's operational needs and will achieve 100% participation by the Perkins Executive Board.

Mr. Cheves called upon Ms. Connie O'Neill to provide an update from the update for the Simmons School of Education Campaign Steering Committee.

- Ms. O'Neill was pleased to be at the meeting to represent the Simmons School Campaign Steering Committee along with fellow co-chairs Lottye Brodsky-Lyle and Dick Collins.
- Simmons has experienced great momentum this fall. The School awarded its first cohort of Bishop Scholarships to 8 Dallas ISD teachers and considers this program as a model to replicate for future scholarship fundraising. The School also celebrated a \$1.5M gift from Carter Creech, who is a Cox alum, to develop a robust middle school college and career readiness program within the West Dallas STEM School. Ms. O'Neill thanked Cox Dean Myers for the introductions to the donor.

Ms. O'Neill moved to the topic of Fundraising Initiatives.

- In fall 2021, the West Dallas STEM School will open its doors to its first group of students. Renewed support from Toyota for the long-term project is anticipated, but the School will expand fundraising activity to new partners as needs change and increase.
- Simmons is supporting the R1 initiative through notable research activity, much of which happens within its centers and institutes. Support in this area will deepen the Simmons Schools reputation as a leader in education and human development.
- Most importantly, securing funds to recruit and retain the best students and faculty will set the Simmons School forward to achieving many of its strategic goals. The School's donor-funded scholarship and fellowship dollars need to grow to alleviate the pull from the school's unrestricted funds. Adding endowed chairs and professorships provides the prestige and support the Simmons School endeavors to offer its faculty.

Ms. O'Neill moved to the topic of Fundraising Updates.

- Pony Power Plus provides vital funds for the operating needs of the School. An increase of end-of-year giving is expected and the School aims to achieve 100% board participation by the end of the fiscal year.
- The campaign objectives for Simmons are focused on both endowment and operational dollars. Nearly \$11 million has been raised, which includes the Bishop Endowment and Carter Creech gifts mentioned earlier,

as well as the Toyota support for the West Dallas STEM School project. Overall, the Simmons School is on a strong, upward trajectory for campaign success.

Mr. Cheves called upon Mr. Will Howard to provide an update from Athletics Campaign Steering Committee.

- Mr. Howard was pleased to be at the meeting to represent the Athletics Campaign Steering Committee, along with fellow co-chairs Bill Armstrong and Bruce Robson.
- Mr. Howard said it has been an interesting year for all areas of campus, and Athletics is no exception. The only sport competing this fall is the football team. They are playing well and will be going to a bowl game for the third time in four years despite the numerous challenges presented by COVID-19. The men's and women's basketball seasons tipped off last week, and Athletics awaits the remaining sports' return to competition after the new year. It will be a very busy spring on the Hilltop for Athletics.

Mr. Howard moved to the topic of Fundraising Initiatives.

- Operational funds including the Mustang Athletic Fund, Excellence Funds, and the Circle of Champions are vital to the livelihood of Athletics and will be a primary focus for the Mustang Club staff during these challenging times.
- With the assistance of DEA colleagues, Athletics will be rolling out a campus-wide fundraising initiative called the Athletic Fund for Immediate Needs (AFIN) to help offset the loss in revenue from ticket sales and donations due to reduced capacity in Ford Stadium and Moody Coliseum.
- Led by co-chair Bill Armstrong, the Athletics department recently began raising funds for the SMU Football: Vision 2025 fund. It will be used over the next five years to support strategic priorities such as key personnel, recruiting, nutrition, student athletes' mental and physical health and continued efforts to grow SMU's brand and reputation.
- From a capital projects standpoint, ground has been broken for the new Washburne Soccer and Track stadium with fundraising efforts ongoing.
- Finally, fundraising efforts for an outdoor pool are off to a fast start after co-chair Bruce Robson made a lead gift, prompting several other donors to follow his lead and join him in making commitments. When the adjoining outdoor pool is added, the Robson & Lindley Aquatics Center will be completed, making it the only college facility in the country with both an indoor and outdoor Olympic sized pool.

Mr. Howard moved to the topic of Fundraising Updates.

- Athletics' Pony Power Plus efforts are focused on the Mustang Athletic Fund and Circle of Champions which provide operational support for the Athletics Department, enabling a well-rounded educational experience for all 484 SMU student-athletes. Sport specific Excellence Funds provide discretionary resources for each head coach to enhance their program.
- Capital projects and operational needs are currently the two priorities for the Athletic Department. Due to the number of athletics capital projects that have been built in recent years, payments on them have accounted for almost 2/3 of athletics revenue during this campaign, with operational accounting for the remaining 1/3.

Mr. Cheves thanked the Committee Chairs for giving their reports. He proceeded to provide an update on some General University initiatives.

- In the area of Student Affairs, Hughes-Trigg Student Center is going through its first renovation since opening its doors in 1987. SMU is working to secure funds for the transformation of the student center which is a key part of the student experience here on the Hilltop. A number of prospects have been solicited

in support of the \$5 million target. Also, the recently constructed Daniel House residence hall for upper classmen provides a naming opportunity for that facility at the \$5 million level; we will be seeking a naming donor through the campaign.

- SMU Libraries recently secured funding to support a collection acquisition and they are also finalizing plans for continued renovation of Fondren Library Center. Fondren's improvements include renovations to the space to become a state-of-the-art research studio. This Library Center will be a place where students and faculty can get hands-on assistance in using research tools on campus. Once those plans are finalized, a fundraising strategy will be developed to support that project.
- The Provost's Office has several emerging priorities. The new Moody School has generated visibility and the results of planning related to the facility will be seen in the near future, and hopefully a groundbreaking ceremony in 2021. Funding opportunities for a variety of campus-wide initiatives will be developed in support of reaching R1 research status. Scholarship support is also critical at this time in response to COVID, but also to maintaining the quality gains of the student body the University has achieved over the past several years.
- Finally, SMU-in-Taos continues to have energy around their campus master plan as well as the ongoing programs funded by the Friends program. The SMU-in-Taos Master Plan has identified four top priorities in preparation for the return of students and guests on campus when COVID restrictions are eased.

Mr. Cheves called upon Dr. Turner to discuss Mustang Momentum.

- Dr. Turner thanked the Committee members, as well as their committee members, who have stayed with SMU over the past year. Dr. Turner stated it has been over 20 years of growth, development, and acceleration in terms of academics and athletics quality, as well as the scope and impact of the University's outreach and fundraising programs.
- Dr. Turner noted that the entire first campaign, A Time to Lead, concluded with a notable \$541 million – far beyond its initial goal, which was raised once Mr. Ford made his commitment for a new stadium, now celebrating its 20th anniversary. Next, the Second Century Campaign ended with \$1.15 billion – an achievement that set SMU apart and put the University in the top level of national campaigns. SMU plans to set records again.
- Dr. Turner was pleased to announce the new campaign total had just exceeded \$553 million -- more than the entire first campaign. When SMU kicked off the second campaign, there was \$317 million in the quiet phase. SMU is doing well by comparison. This is a testament to the Committee's work, and to the commitment and generosity of the entire Mustang Nation.
- This momentum is an accelerant to campaign planning, so the University will immediately move into preparing for a public phase kickoff in the months ahead. Dr. Turner said he, the co-chairs, and Mr. Cheves will work with each member of the CEC to prepare for another historic era for SMU.

Dr. Turner turned the floor over to Mr. Cheves to update the Committee on activity for the spring.

- Mr. Cheves stated as the University prepares for a public launch, during this spring it will look at three key planning tools to guide its campaign financial and project goal determination:
 - Goals will be established from the Strategic plan in the areas of facilities, endowments, and operations
 - The current prospect list will be analyzed for financial capacity and interest
 - A timeline will be proposed for the kickoff and duration of the campaign.
- As seen in charts through the meeting, totals are broken into three components: endowment, facilities and equipment, and current use operations. Mr. Cheves directed the Committee's attention to a slide showing

the breakout for the Second Century Campaign, which ended in 2015. Operating gifts accounted for 40% of the total; facilities & equipment for 28% of the total; and endowment for 32% of the total. These results will be used as a guide for projecting goals in these areas for the upcoming campaign. Thus far, these breakouts are being reflected in results for the new campaign.

- As work continues toward projecting a potential campaign goal, the numbers of Principal Gift \$1 million-plus donors from the previous two campaigns are being analyzed. Mr. Cheves noted a chart reflects that history: in the first campaign, there were 113 donors of a cumulative \$1M or more; in the second campaign there were 183; in the current campaign to date, there are 74 Principal Gift donors as Dr. Turner reported earlier; and the University aspires to reach 285 Principal Gift donors, which would be 102 more than in the last campaign. These projections will be studied over the spring as the campaign leadership considers the public goal.
- The third topic for spring is the timing of the campaign public launch and the campaign's duration in term of years. Mr. Cheves pointed out a timeline shown for a 11-year campaign, including the current quiet phase. Over the spring various options will be considered and a kickoff date will be proposed, both on campus and over time, across the country.
- To conclude, Mr. Cheves reminded the Committee of the provisions in CARES act. Congress passed the CARES Act in response to COVID. Mr. Cheves drew the Committee's attention to CARES Act Provisions which apply through the end of the calendar year: Key Provisions of CARES Act affecting Charitable Giving to Public Charities include, as listed:
 - Individual Cash Contributions deductible to 100% of Adjusted Gross Income
 - Corporate Cash Contributions deductible up to 25% of taxable income
 - Universal Charitable Deduction of \$300 available in addition to Standard Deduction
 - IRA Qualified Charitable Deductions available
- SMU's Gift Planning team stands ready to answer any questions you may have regarding these opportunities.

Mr. Cheves returned the floor to Dr. Turner for remarks and adjournment.

- Dr. Turner thanked the Committee for their efforts for the campaign and for their participation in the meeting. Dr. Turner stated that the University's momentum is remarkable given the national conditions, and he was heartened by the success even in trying times.

With no further business, Dr. Turner adjourned the meeting.

**Meeting of the Campaign Executive Committee
May 6, 2021, 9:45 am, via Zoom**

MEETING MINUTES

At 9:45 am, Mr. Brad Cheves called the meeting to order.

Mr. Cheves provided instructions regarding the functionality of Zoom software and offered assistance, if needed, with accessibility of the meeting packet. Mr. Cheves then called upon SMU Board Chair Mr. Bob Dedman to welcome the Committee and make introductions.

- Mr. Dedman welcomed the Campaign Executive Committee (CEC) to the fourth meeting of the CEC for SMU's upcoming new campaign. He noted the Campaign Executive Committee is composed of members of the Campaign Leadership Council (CLC) along with the co-chairs of our Campaign Steering Committees (CSCs). A complete committee roster is provided behind Tab A of your packet. Mr. Dedman

thanked his fellow members of the CLC in attendance, who guided SMU through this planning phase: Mike Boone, Kelly Compton, Ray Hunt, David Miller, Caren Prothro, and Carl Sewell.

- Mr. Dedman noted the Committee was also joined on the call by members of the President's Executive Council, academic deans, and the Director of Athletics. Also attending the meeting were staff leadership of Development and External Affairs as well as the Directors of Development who support the Campaign Steering Committees. SMU's campaign consultant, Bob Sweeney, was also on the Zoom call. Mr. Dedman thanked everyone for participating. Mr. Dedman informed the Committee the minutes of the December CEC meeting were provided behind Tab B of the materials.

Mr. Dedman gave the floor to Dr. R. Gerald Turner to provide the President's Report.

- Dr. Turner thanked the committee members for being at the meeting. Dr. Turner said he had been attending meetings with each of the Campaign Steering Committees, and many of the DEA Committee members had been following the progress of the campaign through events and announcements. Dr. Turner stated the University was fortunate to have a productive spring and a successful full year, even with COVID challenges. SMU is modifying its protocols as more folks are getting vaccinated, and the University is eager to get as close to normal in activities by next fall. But regardless, the Committee's work on the Campaign during this planning phase is really paying off.
- Dr. Turner provided an update on the current status of the campaign before moving on to the core information on the agenda. First, the new principal gifts since the Committee last met in December were:
 - Anonymous; \$5,000,000; Cox Facility Project
 - Bill Armstrong '82 and Liz Martin Armstrong '82 and The Armstrong Foundation;
 - two \$1,000,000 gifts; Vision 2025 Football Support Fund
 - Carter Creech '60, '63; \$3,500,000; West Dallas STEM School (Simmons School)
 - Frederick B. Hegi, Jr. '66 and Jan Vestal Hegi '66, The Hegi Family; \$1,000,000; Hegi Career Center
 - Barry M. Kitt and Beth M. Kitt; \$1,000,000; Cox Facility Project
 - Jeremy M. Lacy '96; \$1,200,000; Cox Scholarships
 - Joshua E. Oren '94, '99 and Lisa Harmon Oren '98; \$1,000,000; Hughes-Trigg Expansion and Renovation Fund
 - Carl Sewell '66 and Peggy Higgins Sewell '72; \$1,000,000; Sewell BBA Scholars
 - Bryan S. Sheffield '01 and Sharoll M. Sheffield; \$15,000,000; Cox Facility Project
 - Jennifer Overstreet Styslinger '86 and Mark J. Styslinger '87; \$4,000,000; SMU Tennis Complex, Tennis Excellence Fund
 - Mary C. Templeton and Richard K. Templeton; \$5,000,000; The Templeton Endowed PhD Fellowship Fund and The Templeton Endowed Undergraduate Scholarship Fund
- Dr. Turner was pleased to report over \$618 million in commitments received to date for endowments, facilities and equipment, and current-use Pony Power. When considering the University is not in a full-out campaign, and the notable stresses of the past several months, this is a remarkable testament to the importance of SMU to our region and country, and the loyalty and generosity of SMU's alumni, parents, friends and supporters. Dr. Turner thanked the Committee for being a huge part of the success to date.
- Dr. Turner brought the Committee's attention to a chart showing campaign progress over time, compared with the final results of the last two campaigns. The University has already exceeded the final results of the first campaign – as indicated by the lower horizontal line. SMU has received well over 50% of the results of the entire second campaign. So, this bodes well for the discussion today as the Committee considers a public launch next fall.

Mr. Dedman called upon Mr. Carl Sewell to provide the Pony Power Plus update.

- Mr. Sewell stated SMU's progress for this year's Pony Power Plus drive is reflected in the packet. As of March 31, 2021, more than \$41.5 million had been raised, accounting for 83% of the goal. Support for PFIN and AFIN initiatives also remain strong.
- On Giving Day, Pony Power designations were featured prominently. These gifts will add more than \$2 million to the Pony Power annual giving total. This month, mass solicitation efforts and personal outreach will continue in order to cross the finish line.
- As the fall approaches, current Pony Power leaders in the schools continue their work on this effort. This summer, these leaders - together with representatives from SMU's alumni, parent, faculty, staff, student and athletics communities - will continue to brainstorm on how to maximize the volunteer efforts surrounding this important drive so it fits cohesively into the upcoming campaign.

Mr. Dedman called upon Mr. Cheves to provide an update on campaign momentum during this Planning Phase, resulting from the work of the Campaign Steering Committees.

- Mr. Cheves stated the past two meetings of each Campaign Steering Committee provided updates, including at the December meeting when new commitments in each area as well as financial results were provided. Those details are captured in the minutes of the meeting. Today, as the Committee considers the public launch in the fall, this portion of the meeting is abbreviated and a full update is included as Attachment D. Each CSC report in Attachment D provides a full committee roster, results to date, and new major and principal gift commitments since this Committee's last meeting.
- First, there are commitments from across the nation – while Texas will always be a major focus for the University, there are already, before launching, commitments from across the US and even globally. Second, parents will be an important part of SMU's national expansion. As one of many examples, Nicole and Dan Doyle, parents and alumna who live in Florida, made a significant unrestricted gift to the campaign. Mr. Cheves said excitement across the nation is going to bring in new folks. Finally, the national campaign is going to explode when it goes public, and the campaign will be taken across the nation and the world.
- The Cox campaign has already exceeded the amount raised for the school in the entire last campaign – a testament to the leadership and work of co-chairs Tucker Bridwell, Kyle Miller, Mark Plunkett, and Kirk Rimer. There has been notable success in gaining support for the signature project of new and renovated facilities, with early support from David, Tucker, the Bolins and the Heppners – and most recently the Sheffields. There have been gifts to other priorities of the school worth noting, including Diane and Hal Brierley's commitment which created The Brierley Institute for Customer Engagement. As well, Jeanne Johnson's estate gift which, among other items, funded the Jeanne R. Johnson Scholarship Fund for women students in Cox. Mr. Cheves also gave a special thanks to Peggy and Carl Sewell for their generous gift to support BBA scholars.
- Dedman College has a broad level of support and an exciting list of funding opportunities, many related to SMU's expanding faculty research focus under the leadership of Jon Altshuler, Liz Armstrong and Ashlee Kleinert. Among the many areas of support already received by the College, two are prime examples of momentum: Ashley and Chris Kleinert's gift supporting the Human Rights Program and Dedman Scholars, and Carl Sewell's challenge grant for Dedman Scholars which has drawn significant support from other donors. The Human Rights Program is celebrating their 15th anniversary since establishment. Mr. Cheves was happy to announce the Program received \$1.4M in endowment support, including gifts from Benjamin and Deanna Velvin & Ann and J.D. Dell. This support will ensure sustainable future success of the program for their students.
- Dedman Law has leveraged the challenges of COVID and other societal issues to create new programs and responses, and their campaign will support their continuing leadership in legal education under the guidance of co-chairs Jim Baldwin, David Huntley and Amy Ware. Early support has established the Robert B. Rowling Center for Business Law & Leadership and the Tsai Center for Law, Science and

Innovation, as just two examples. Recently, Dedman Law alumna Angela '85 and Doug Braly created a fund they generously named the Jennifer M. Collins Women's Leadership Initiative in honor of the first female law dean at SMU. The Initiative supports female law students and practicing attorneys as they navigate their legal careers. Dedman Law also recently received close to \$1 million from Arnold Ventures as well as the Communities Foundation of Texas to support the Deason Criminal Justice Reform Center.

- The Lyle School's campaign is led by convening co-chair Bobby Lyle, and co-chairs Hilda Galvan, Michael Sullivan and Rick Templeton. The School's new Strategic Plan Engineering with Impact is driving the campaign and it received a huge boost when Mr. Bobby Lyle designated his giving to key priorities of the plan. Shortly thereafter, among many other acts of the support the Templeton's provided the first of two principal gifts to the Lyle campaign, supporting faculty research and student scholarships and fellowships. The Harts have continued their support of Lyle, Cox and other areas including Ford Hall, adding momentum to Lyle and other areas of the campaign. Executive Board Members Harvey Wiggins and Richard Schulze invested in Lyle's road to R1 status with a \$100,000 investment from Mr. Wiggins for research equipment and \$250,000 from Mr. Schulze in support of Lyle's Research Impact Fund.
- Although many areas of the Meadows School and Meadows Museum are receiving early support, the most visible project at this time is a drive to support the renovation of Owen Arts Center. The drive is under the leadership of co-chairs Jennifer Altabef, Sarah Perot, Peggy Sewell, and Marvin Singleton, who are each using their notable talents of persuasion. They are joined by Caren Prothro and others to attract new support. Mr. Cheves noted the photo shown on the slide is symbolic of the continuing and new donors drawn to the project. The photo was taken on the day celebrating the commencement of the renovation and expansion. Major gifts have been giving to help support student scholarship efforts. Gifts were given to the Thomas W. Tunks Endowed Graduate Music Education Scholarship Fund, Meadows Scholars Program, and the Jeanne R. Johnson Meadows Scholars Endowment Fund. Meadows initiatives like DataArts and Ignite/Arts Dallas have received support from the Virginia G. Piper Charitable Trust and the George & Fay Young Foundation, respectively.
- The Perkins School is celebrating the completion of the Bridwell Library renovation, and most recently the gift of the entire holding of the former World Methodist Museum, one of the world's largest collections of historical items related to John Wesley, founder of Methodism. This new acquisition will transform Bridwell Library into a worldwide leader in church historical research and support scholarship in Methodism. The collection will support the teaching and research of not only the Perkins School faculty, but faculty in History, Religious Studies, and elsewhere at SMU. Under the leadership of Dodee Crockett, Joe Hardt and Julie Yarbrough, the school is already receiving significant gifts in support of faculty and students, and perhaps most prominently, the Gaye and Bill Solomon, who have named the chapel's new organ in honor of Caren and Vin Prothro, and invited others to join them in funding its renovation and Installation. Perkins also received major gifts for scholarship support – including a gift which will help Perkins recruit students over the next three years by expanding the Perkins Scholars program from the current 10 entering students to 15 entering students, as well as rounding up funds for other students and giving general scholarship support.
- The Simmons School is a leader at SMU in receiving research support, largely because the school was founded on developing solutions through evidence-based research. Among the many areas receiving support at Simmons, this year the school is focused on the opening of the West Dallas STEM School, a partnership among Dallas ISD, Simmons and Toyota, with support from other leading corporations and foundations. In *U.S. News & World Report*, Simmons climbed from #63 to #59 among public and private graduate schools of education in the ranking released March 30 for 2022. Within the ranks of national private universities, Simmons also made gains, moving from the top 25 schools to the top 15 schools. Simmons is #3 across all Texas universities. Under the stewardship of Lottye Brodsky, Dick Collins and Connie O'Neill, the school has developed exciting funding opportunities and is eager to build a broad base of support through the campaign. New gifts included scholarship support for students concentrating in urban education, funding for Sport Management activities, and more.
- Mr. Cheves said it was no surprise athletics is generously supported each year, and will be through the campaign. Bill Armstrong, Bill Howard, and Bruce Robson have already energized early giving, as

evidenced by the opening of the IPC and Armstrong Fieldhouse, the launch of a drive for the outdoor pool with early support from Bruce, groundbreaking for the Washburn Soccer and Track Stadium, and of course, the drives which support specific sports, such as the new Vision 2025 Initiative supporting football. There are several projects in athletics anticipated to emerge over time, especially as SMU continues to excel competitively.

- Mr. Cheves stated although CSCs were created for each of the schools and athletics with pre-existing alumni bases and/or significant bases of donors and prospects, they were not the entirety of the campaign. Many SMU priorities exist within the realm of General University, such as SMU Libraries, Student Affairs, general campus improvements, SMU-in-Taos, scholarship support, research support, etc. Historic support has already been received. Two examples are the gift from Moody Foundation which created the Moody School of Graduate and Advanced Study, and the most recent gift from Nancy Anne and Ray Hunt to the Hunt Leadership Scholars Program. These and hundreds of other gifts, large and small, supporting nearly every area of SMU which will be an important part of the campaign, as will the continuing Pony Power drive each year. Awareness continues to build for the newly renovated Hughes-Trigg Student Center. To date major gifts include the naming of The Auditorium, expansion of the Hegi Family Career Development Center Footprint and program offerings, and The Veterans Center. As a result of Hughes Trigg being open to students and a hub on the hilltop, interest remains high in this project so additional exciting naming opportunities are on the horizon. SMU Libraries' special collections just received three notable gifts: the papers of Ebby Halliday, groundbreaking Dallas real estate mogul; the papers of Virginia McAlester, historical preservation advocate and 2019 SMU honorary degree recipient; and the Stephen Jarchow collection, which contains rare juvenile series books. In addition to preserving these items for history, these one-of-a-kind collections provide invaluable resources for scholars who use them to conduct research. Offering comprehensive research opportunities allow SMU to attract the best faculty and students.

Mr. Cheves gave the floor to Dr. Turner to provide his perspective.

- The proposal to launch a campaign in the fall is based on the experience over the past two campaigns as well as the vision for SMU's future as outlined in the Strategic Plan, and the analysis of how the financial commitments it will take to realize the University's vision will be met – especially with limitations on tuition increases, the rising costs associated with scholarships and faculty investments, SMU's investment in a competitive athletics program (which obviously helps with recruitment and alumni engagement) and the need to continue first-class facilities and student services.
- All this leads to a new campaign as a part of the University's strategy. But SMU has done this before and it can be done again. Dr. Turner reminded the Committee the first campaign raised over a half billion, the second campaign exceeded a billion, for a total of \$1.6 billion – proving campaigns build increasing support over a sustained period of time. Dr. Turner added the Bush Center invested another significant amount through their campaign for facilities, and now, their endowment.
 - Student Scholarships were a hallmark of both campaigns. This year alone, early payments on scholarship endowment pledges from the last campaign are already generating \$8.6 million in yearly distributions, and this will grow as pledges are completed and endowments come on line.
 - Endowed Faculty Positions were emphasized in the last two campaigns. This year alone, early payments on faculty position endowment pledges from the last campaign are already generating \$6 million in yearly distributions, which will grow over time.
 - Academic programs were obviously supported in the last two campaigns. This year alone, early payments on academic endowment pledges from the last campaign are already generating \$4.6 million in yearly distributions.
- Finally, the campus has transformed over the last 20 plus years, largely funded by campaign commitments. Dr. Turner showed examples of campus projects to demonstrate the scope and impact of these investments.

- Dr. Turner stated campaigns build strong relationships with donors, alumni and friends which result in sustainable giving programs. Dr. Turner turned the Committee's attention to a chart showing yearly gift revenues since 1978. The blue shaded years represent the first campaign; the red shaded years represent the second campaign, and the horizontal red lines represent the average annual gift revenue during those years. Clearly, campaigns help the University grow its outreach and engagement with donors, which extends beyond the campaigns themselves.
- Dr. Turner said success breeds ambition for even greater success. Hence the Board of Trustees gives at historic levels, as do other donors. This chart shows the numbers of donors giving at two levels: \$100K to \$999K: and \$1M plus. Campaigns help grow the numbers of donors at each level, and encourage donors to increase their giving.
- One of the striking things about the recent Cox gift announcements is donors at younger ages are contributing at the highest levels. The campaign will help SMU continue the trend.

Dr. Turner returned the floor to Mr. Dedman.

- Mr. Dedman stated it was very powerful to recall what the University has done and can do when the entire SMU family takes on a significant challenge – in the case of campaigns, decades-long challenges were met with remarkable success, and in the case of the last year, remarkable success in managing something of not its own doing. Mr. Dedman turned the Committee's attention to the full text of the resolution provided as Attachment E. The summary was provided on the screen, which Mr. Dedman read aloud:

RESOLVED, the SMU Board of Trustees authorizes the public launch of a comprehensive funding campaign in September, 2021, and authorizes the Campaign's volunteer leadership and the University's staff to take the necessary steps in preparation.

- Mr. Dedman introduced a motion to recommend to the full Board at their meeting tomorrow passage of this resolution. Mr. Dedman noted there were to be comments in response from those individuals listed on the agenda, starting with Trustee and Cox Campaign Steering Committee co-Chair Tucker Bridwell.
- Mr. Bridwell said as a CSC co-chair, he represented many campaign volunteers and thanked them all. Mr. Bridwell said he and the volunteers truly appreciate the Campaign Leadership Council, as well as the deans and staff for their leadership. Over the last several months during the quiet COVID phase, Mr. Bridwell had been pleasantly surprised and encouraged by the response from many generous SMU donors. Most encouraging had been the number of major gifts from donors which weren't really on the radar screen at the beginning and have stepped up in a major way. Mr. Bridwell believed there were many more out there. Mr. Bridwell said as he represented his fellow campaign volunteers, he endorsed the resolution to launch a comprehensive funding campaign.

Mr. Dedman called upon Dr. Elizabeth Loba for her comments.

- Dr. Loba thanked Mr. Dedman for the opportunity to endorse the resolution to launch a comprehensive funding campaign. Dr. Loba said since coming to SMU, she has been impressed by the quality of faculty and academic offerings of the University, which fuel its exciting vision for even greater academic excellence. Dr. Loba stated she was endorsing the resolution to launch a comprehensive funding campaign in her role as the Chief Academic Officer and on behalf of the deans, her leadership team, and the University's faculty. The financial support provided through the past two campaigns made possible by the tremendous generosity of SMU's donors is remarkable, and indicates only greater things are possible. Dr. Loba strongly and enthusiastically endorsed this comprehensive campaign initiative and had already begun to engage her leadership team to identify the areas of priority within Academic Affairs related to *US News and World Report's* Top 50 status, SMU's road to R1, and the inclusive excellence initiatives which align within the areas of the campaign. Together with the deans, her leadership team, and the faculty, Dr. Loba looked forward to partnering with the Committee to build SMU into an even greater institution with the ability to provide even greater impact in the days to come.

Mr. Dedman called upon Ms. Jeanne Phillips for her comments.

- Ms. Phillips thanked Mr. Dedman, President Turner and Mr. Cheves for their reports. On behalf of the National Campaign Committee and as chair of the DEA Committee, Ms. Phillips was happy to endorse the resolution to launch a comprehensive funding campaign. SMU has a great National Campaign Committee ready to take the University's story on the road and there is tremendous volunteer leadership on the Alumni Board, the Parent Leadership Council, other committees, and friends of SMU all across the globe, all of whom endorse this action. Of note, the National Committee has identified many of the new next-gen supporters of SMU and is eager to engage them and to seek their help. It's been proven the University's national and international profile can be raised through the past two campaigns, even as remarkable amounts of funding have already been raised. On behalf of the National Campaign Committee and as chair of the DEA Committee, Ms. Phillips strongly endorsed this resolution.

Mr. Dedman then called on Mr. David Miller, Vice-chair of the Board as well as chair of the Trusteeship Committee, member of the Campaign Leadership Council, and co-chair of the Cox Campaign Steering Committee, to comment.

- On behalf of the Board of Trustees and in his role as chair of the Trusteeship Committee, Mr. Miller enthusiastically endorsed the recommendation to be made to the Board. Over the past two decades, SMU has emerged as one of the finest universities in the country. The resounding success of its capital campaigns have not only underwritten the University's ascent, but served as symbols of its rise in quality, visibility, and impact. Mr. Miller was pleased to inform the Committee the full Board's excitement is palpable and as Mr. Bridwell said earlier, is ready to go. The Board is also most appreciative of the donors and volunteers who have joined in this vitally important effort.

With the motion made and seconded, Mr. Dedman asked for a show of hands in support: The vote was unanimous, recording the CEC recommends passage of the resolution by the Board the following day. Mr. Dedman congratulated the Committee members on their hard work which led to this recommendation. Mr. Dedman gave the appreciation of the Committee as well as the Board to the sustained leadership of Dr. Turner over the past decades which had challenged and encouraged SMU to accomplish things previously thought impossible. Mr. Dedman acknowledged the many individuals who held various leadership positions in the past two campaigns who provided tremendous service to the University, and the donors who supported the campaigns so generously. Mr. Dedman said the work is built on the accomplishments of the students and faculty and he congratulated them on their accomplishments. The students and faculty are why this next challenge is being taken on.

Mr. Dedman gave the floor to Mr. Cheves to address the last meeting topic, the DEA team's next steps to prepare for the fall launch.

- Mr. Cheves hoped each of the CEC and CSC members would sign on for the public phase of the campaign, and reported the DEA team would be working to confirm those continuing members and to identify any members needing to be added before launch. Mr. Cheves noted the public phase campaign roster has expanded to include the representational members serving on the DEA Committee so all Mustangs see themselves in the campaign leadership structure.
- Dates for the public launch have already been identified, initially focused on our two biggest cities in Texas: Dallas and Houston. In conjunction with the September Board meeting, the campus launch will occur midday on September 17. A community launch in the center of Dallas will follow, with SMU as the guests of AT&T at their new world headquarters, thanks to Trustee David Huntley. The National Committee will begin its national outreach with kickoff events in Houston timed to the SMU football game against University of Houston. Over the months following, other events will be held in Atlanta and other key regions and the campaign will be promoted at Homecoming and other home games throughout the fall. Mr. Cheves asked the Committee to mark their calendars for September 17, 2021. Immediately following the Board decision on Friday day, save-the-date notices and other information will be sent out.

- To close, Mr. Cheves thanked Dr. Turner and the administration for their leadership, as well as the Committee members on the call who support the work. Mr. Cheves said it was an honor to be a part of this next era for SMU, and he again thanked the Committee for the generous support, time, energy, and encouragement.

Mr. Cheves returned the floor to Mr. Dedman.

- Mr. Dedman thanked the Committee for their participation. Mr. Dedman said they can be proud of the organization and momentum built and the impact it will have on SMU and its students and faculty for generations to come.

Mr. Dedman gave the floor to Dr. Turner for closing comments.

- Dr. Turner said the University was about to enter a marathon, not a sprint. There will be tremendous successes in meeting the Strategic Plan, there will be course changes, and there will be new unimaginable opportunities. Dr. Turner stated he couldn't think of a better team to help SMU be successful. Dr. Turner thanked the Committee again for their efforts.

With no further business, Mr. Dedman adjourned the meeting.

**Meeting of the Campaign Executive Committee
September 16, 2021, 9:00 am, Mack Grand Ballroom**

MEETING MINUTES

At 9:00 am, Mr. Gerald Ford called the meeting to order:

- Mr. Ford welcomed the Committee members to the fifth meeting of the Campaign Executive Committee for SMU's new campaign. Mr. Ford said the Committee normally meets in May and December, and the September 2021 meeting is a special session called to prepare for the Campaign's public launch on September 17, 2021. Mr. Ford thanked the Committee and their colleagues for their hard work and service to bring SMU to this historic point.
- Mr. Ford stated the Campaign Executive Committee is composed of members of the Campaign Leadership Council, along with the co-chairs of the Campaign Steering Committees. A complete committee roster is provided behind Tab A of the packet, and minutes of the May meeting are provided behind Tab B.
- Mr. Ford noted additional attendees: members of the President's Executive Council; academic deans; staff leadership of Development and External Affairs; and Directors of Development supporting Campaign Steering Committees.

Dr. Turner provided a university update:

- Dr. Turner thanked the Committee for participating and for all the work they had done over the past several months. Dr. Turner was pleased to be meeting in person over the next two days, and was delighted with the high attendance and interest in events and activities for the fall.
- The new year has brought one of the best and largest classes in SMU history, and the students are fresh and excited as ever. Fall will be busy with Homecoming activities in early October and many of the lectures, concerts and other events to be announced in due course.
- Dr. Turner pointed out they were joined by two of the recipients of this year's Distinguished Alumni Award, Liz and Bill Armstrong. Dr. Turner said SMU was excited to have the Distinguished Alumni Awards event again this year in the Armstrong Fieldhouse.

- Dr. Turner said this was a historic week as it pertains to this Committee. Tomorrow the new campaign would be launched, largely because of the Committee's work and the early generosity of SMU's donors. Dr. Turner pointed out new Principal Gift commitments received since the last meeting, found in Attachment C:

| | | |
|---|-------------------------------|--|
| Edwin L. Cox '42 † | \$5,000,000.00 | Edwin Cox Endowment |
| Linda Pitts Custard '60, '99, and William A. Custard '57 | \$3,000,000.00 | The Custard Institute for Spanish Art and Culture at the Meadows Museum |
| John R. Ingram and Stephanie H. Ingram | \$2,000,000.00 | The Ingram Family Endowed Mustang Scholarship Fund – Endowment and Current-use Support |
| Alessandra Comini | \$2,000,000.00 | The Alessandra Comini Endowed Fellowship Fund and The Alessandra Comini Endowed Professorship in European Music History Fund |
| Teddlie Family Trust | \$1,400,000.00 | General University Endowed Scholarship Support |
| Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 | \$1,250,000.00 | The Nancy Ann and Ray L. Hunt Leadership Scholars Program Endowment Fund |
| Allison T. Benners and Frederick H. Benners, Jr. '90, '97 | \$1,000,000.00 | Cox School Renovation and Expansion Fund |
| Charles R. Emrich '79 | \$1,000,000.00 | The Charles R. Emrich Endowed Scholarship Fund |
| Anna Allen McLean '87 and Scott J. McLean '78 | \$780,000 for a total of \$1M | President's Discretionary Fund |
| Bruce A. Robson '74 and Emily K. Robson | \$1,000,000.00 | Robson & Lindley Aquatics Center - Phase II |
| Carl Sewell '66 and Peggy Higgins Sewell '72 | \$1,000,000.00 | Meadows School of the Arts |

- Dr. Turner reported SMU's gift revenues continued to set records – the last fiscal year ended in May with over \$142 million in gift receipts for all purposes, including the tremendously successful Pony Power program headed by Mr. Sewell and Ms. Prothro. Later in the meeting, the Committee will discuss current-use giving and the important role it will play in the campaign going forward.

Mr. Brad Cheves led the Committee through area updates:

- Mr. Cheves welcomed the Committee and introduced two guests asked to attend and observe the meeting. The first is Bob Sweeney, SMU's campaign counsel. Mr. Cheves said many of the Committee members knew of Mr. Sweeney's long-standing career in philanthropy, including decades of service as Vice President at University of Virginia.

- Mr. Cheves then introduced Susan Lewis, Vice Provost at Abilene Christian University and ACE Fellow, which recognizes national leaders in higher education. Dr. Lewis will be in residence at SMU for the fall semester and among the various areas she is studying and observing is Development, so this session would be of interest to her.

Ms. Jeanne Phillips provided the National Steering Committee update:

- Ms. Phillips reported the National Committee was excited to be launching the third campaign. The momentum and energy on the Hilltop is truly incredible, which will be noticeable throughout the day's meetings. Ms. Phillips said the charge of the National Steering Committee is to build, strengthen, and engage the national and international SMU alumni, parent, and friend network through in person and regional engagement methods. The National Campaign Committee is also led by fellow co-chairs Scott McLean, Marty Flanagan, Richard Ware and Ed Wilson. Ms. Phillips thanked the co-chairs for their hard work in the last months.
- There are already amazing results in markets across the country at the conclusion of the quiet phase. Dallas, Houston, and the state of Texas as a whole are currently providing for over 80% of fundraising production to date. These early results are in alignment with the gift production shown during the *Unbridled* campaign. There is also growth in new geographies. Ms. Phillips specifically called out New York, Connecticut, Colorado, Nashville, South Florida, Southern California and Washington D.C. as producing over \$4.5 million in campaign support to date. These regions have been centers for economic development in the last five to ten years; and SMU alumni, parents, and friends are showing strength in their support of the Hilltop. Cities such as Chicago, Atlanta, and San Francisco continue to have strong donor participation rates and it's expected their campaign dollars will increase soon.
- Ms. Phillips thanked the Committee who worked in those areas for their progress, which would be addressed in more detail later in the meeting. Ms. Phillips then focused on three upcoming events for the national campaign rollout. Ms. Phillips said anyone was welcome to join, and to contact Mr. Cheves if they would like to be involved.
- The first event would take place in Dallas on September 21 at the new AT&T Discovery Zone downtown, and the intended audience is the Dallas business community, the broader community, and political leaders in the area. Next, there will be a major donor reception dinner in Houston on October 29 at the St. Regis hotel. The dinner will be hosted by two of the National Committee members, Scott McLean and Steve Lindley. The following day on October 30, there will be an all alumni tailgate at the SMU-Houston football game. Ms. Phillips encouraged Committee members to join them for the game and tailgate. Wrapping up the fall schedule events will be a campaign launch event in Atlanta on December 9, hosted by National Committee member Marty Flanagan and his wife Jennifer.
- Ms. Phillips knew the Committee was looking forward to taking SMU on the road to celebrate, gather, and come together on behalf of Mustang Nation. Ms. Phillips reminded the Committee if they knew of key leaders who would be ideal members of the National Steering Committee to pass those names along to her or Mr. Blake Davis.

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- The Cox School is busy raising money for the Cox renovation and expansion project. Cox has raised approximately 70% towards the goal of \$117 million and have some exciting news coming soon. A key priority for the School is scholarship support for both undergraduate and graduates. The third priority for the Cox campaign is annual support for the centers and institutes. This support allows each center and institute to grow their programs and is a differentiator for the School.
- The Cox Steering Committee has been busy during the quiet phase. Since the Committee last met, Allison and Rick Benners donated \$1 million towards the building project. The School received a planned gift

from Charles Emrich towards scholarships, and CFP Foundation donated \$300,000 towards BBA Scholars. Mr. and Mrs. Sewell and the CFP Foundation are major supporters of the BBA Scholars, SMU's premier undergraduate business scholarship program.

- Cox has raised \$163 million this campaign: \$78 million towards capital, \$45 million towards operating and \$35 million towards the endowment. There is \$5 million undesignated which will be determined at a later date.
- The Cox Campaign Steering Committee had a working meeting last week. A gift announcement will be held at 11:00 am on October 1 during Homecoming Weekend. Mr. Bridwell welcome the Committee members to join attend the announcement in the EY Gallery in the Fincher Building. The same evening, the MBA and MS reunions will be held, and a large crowd is expected. October 14 and 15 we have our executive board dinner and meeting. Phase Two of the building campaign will be announced during the Cox Executive Board meeting to focus on raising the final \$40 million towards the Cox renovation and expansion project by May 2022.
- Mr. Bridwell said Cox was ready for the campaign and looked forward to working with the Committee to make the campaign a major success.

Ms. Liz Armstrong provided the Dedman College Campaign Steering Committee update:

- Ms. Armstrong stated the fall semester had been an exciting one for the College. Increased engagement with the Executive Board has been a main priority and resulted in having Zoom meetings once a month focusing on a current event or topic Dedman faculty specialize in.
- The fundraising efforts for the College have seen successful despite the pandemic. Partners from all over the country have been giving selflessly to invest in students. Over \$750,000 has been committed to the College in new gift pledges via estate planning, a new endowment is being created in the Human Rights Program for travel abroad opportunities, and three new scholarships are being finalized – two of which benefit the Dedman College Scholars Program.
- One of the most successful Pony Power initiatives is the Dedman College Scholars Program. Due to the generous support of Mr. Carl Sewell, the College was able to form “The Sewell Challenge” where gifts were matched 1:1 with a \$400,000 goal. Today, 83 students hold the esteemed title of Dedman College Scholar.
- The SMU Human Rights Program is a crown jewel of Dedman and of the University. As one of only seven institutions in the country holding such a program, SMU has positioned itself to be a leader within the field by transforming the lives of students through important classroom study, research, and study abroad experiences.
- The College has two endowments which are vital for the success of the campaign's R1 initiative and will immediately provide a quality of life enhancement for faculty, staff, and students. An endowed deanship will provide perpetual financial support for emerging Dedman priorities administered by the current and future deans of Dedman College. Graduate students are key to cutting edge research all across campus and play a vital in the research productivity and innovation of the university. Establishing a centralized fund to administer aid for graduate student will ensure our success in our R1 initiatives.

Mr. Jim Baldwin provided the Dedman School of Law Campaign Steering Committee update:

- Mr. Baldwin was excited about the upcoming campaign and all it will mean for the Law School. The School relies on scholarships to recruit top-quality students who will excel in law. Competition for these students is intense, so scholarships often make the difference in a student's law school choice.

Scholarships are critically important in reducing the debt many students face and will always be a top priority of the Law School.

- One of the scholarship areas the Law School is focusing on this year is Dedman Law's Impact Scholarship. This is a scholarship for talented students from economically or educationally underserved communities, with a preference for first-generation students. The goal is the scholarship recipients will receive tuition relief as well as ongoing mentoring.
- The Law School's three Centers and eleven Clinics provide students with critical experiential learning opportunities. The goal is to secure consistent, external funding for these areas to better serve students and the community.
- Florence Hall is the Law School's primary classroom building and is one of the oldest buildings on campus. It is now time to replace this building with an instructional facility befitting one of the country's very best law schools. The Law School is actively seeking a lead donor for this project.
- The Law School welcomed a very talented and diverse class of 1Ls, with a 163 median LSAT and a 3.76 median GPA. Thirty-two percent are students of color, and 28 students are first-generation.
- A rising scholars summer program was conducted to introduce high school students from economically disadvantaged backgrounds to law school.
- The Stanton Foundation is so pleased with the work of the First Amendment Clinic they are increasing their support by \$450,000.
- The Law School is asking Dallas-based law firms to sponsor student initiatives focused on diversity, women's leadership, and public interest. There has been a very positive response so far.
- Mr. Baldwin brought the Committee's attention to a pie chart shows the Law School's progress to date. Mr. Baldwin reviewed some upcoming events and opportunities: the annual law firm challenge, the annual giving initiative for Texas-based law firms, will be in December; in-person reunions for this year's and last year's reunion classes; Mustang Bar alumni events and tailgates this fall; and the 50th anniversary of the Underwood Law Library will be observed.

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- The School's campaign priorities continue to be Scholarships, Fellowships, and Ph.D. student support; Centers and Institutes; and Research Initiation Funding.
- A \$1.2 million commitment from Lyle alumnus William Raymond Janowski, class of 1957, will fund need-based scholarships with a preference for women. Mr. Janowski continues to attend races where the car he built while at Lyle, 'The Monsterati,' is still on the track. Mr. Janowski pilots his plane to attend these races and to visit campus.
- Lyle's Campaign Steering Committee met on September 2nd for a 'working session,' where it reviewed the strategic plan, and committee members talked about their personal alignment with the School's fundraising objectives. The Committee reviewed thirteen names of highly rated alumni to engage with during the Campaign. The exercise proved to be a success, as the Committee personally knew eight of the thirteen potential donors and offered to introduce Lyle Development and Leadership.
- Student Group WEAT, Water Environment Association of Texas, won the regional competition for their clean water project and will go on to compete at nationals.
- Lyle Ranked as a Top Producer of STEM Minority Graduate rankings for Diverse Issues in Higher Education magazine.

- NASA recognized the Optical Seismometer Team lead by Senior Associate Dean Volkan Otugen for creating a micro-fabricated all-optical seismometer called “Frosty,” which can gather data in harsh environments encountered in icy worlds such as Jupiter's moon Europa.
- As of August 30th, 2021, Lyle’s campaign total is \$23 million, with \$9 million in endowed giving and \$14 million in operating. Upcoming events and opportunities to engage with Lyle include the Red Zone Tent with Cox and football and basketball suites for all home games.
- Dr. Lyle gave details about the Download @ Lyle series featuring: a lecture by Jia Zhang on October 6th; a lecture by Ali Beskok and JC Chiao on November 3rd; and the Lyle Executive Board New Member Orientation, Reception, and Meeting on November 11-12.
- Lyle’s CSC meeting will take place on October 13, 2021.

Ms. Jennifer Altabef provided the Meadows School of the Arts Campaign Steering Committee update:

- The Meadows School continues to deepen its support of scholarships in order to recruit and retain the most promising students excelling in their fields with scholarships and fellowships within each division of study, those from underrepresented communities through the Meadows Impact Scholarship fund, and those students succeeding at the highest level of their fields with the Meadows Scholars Program.
- The School is meeting both goals of student and faculty support with recent planned gifts from former SMU professor Alessandra Comini for The Alessandra Comini Endowed Fellowship and The Alessandra Comini Endowed Professorship in European Music History.
- Meadows’ Purpose includes its Academic Programs, Academic Centers and the Meadows Museum. Ms. Altabef extended her thanks to Linda and Bill Custard and the Meadows Foundation for the creation of The Custard Institute for Spanish Art and Culture at the Meadows Museum. This Institute builds upon the museum’s excellence in the field of Spanish studies established more than 50 years ago by Al Meadows and will expand the museum’s research activities and provide for interdisciplinary collaborations at SMU and peer institutions.
- SMU DataArts is once again seen on the national stage as it has been selected to participate in the Digital Accelerator Program by Bloomberg Philanthropies. This program will help cultural nonprofit organizations invest in and use technology to speed their economic recovery from COVID-19.
- As of today, the Owen Arts Center Renovation is at 91% of its fundraising goal. The phase one project will create and improve academic spaces for the visual arts, art history and creative computation while transforming exterior entrances into grand, welcoming and accessible spaces.
- Ms. Altabef was grateful for Mr. Carl and Ms. Peggy and Carl Sewell’s gift of \$1 million for the Meadows campaign.
- Ms. Altabef was pleased to share with the Committee the current Meadows campaign total for the quiet phase: \$45,256,840. Ms. Altabef extended a welcome to the Committee to upcoming Meadows events.
- Meadows will host its Homecoming Tailgate at the front of the Meadows Museum. The annual Meadows at the Meyerson event will be on Tuesday, March 22, 2022 benefiting the Meadows Impact Scholarship Fund. Upcoming dates for the Owen Arts Center Renovation Dedication will announced this spring.

Mr. Joe Hardt provided the Perkins School of Theology Campaign Steering Committee update:

- Mr. Hardt said the School's primary goal, now and always, is student scholarships. Perkins students do not transition into high-paying fields, and therefore potential debt is a huge factor in deciding where to go to seminary. Anything done to mitigate debt makes the Perkins School more attractive to potential students.
- Planned giving is also being emphasized in the campaign. Planned giving is a wonderful way for friends to make major gifts. Mr. Hardt said both he and his parents have taken advantage of this. Mr. Hardt said this aspect should be stressed in more conversations with donors.
- The Perkins School's main capital project is the Caren and Vin Prothro Organ, to be housed in Perkins Chapel. Bill and Gay Solomon initiated this with a \$1 million gift in 2019 and have been joined by two significant commitments, one from the Perkins-Prothro Foundation, and another from Dodee and Billy Crockett. \$800,000 is still needed to complete the project.
- Also, we are always on the lookout for new endowment opportunities. Recently, Sherry Power, a new friend of Perkins, endowed a scholarship in honor of her friend, Perkins alumna Reverend Marilyn Dickson.
- There have been several significant accomplishments during the Quiet Phase of the campaign. First, the Leighton K. Farrell Endowed Deanship fund was established. Thanks to the generosity of an anonymous donor, the Perkins Deanship is now permanently endowed. The Perkins School of Theology also received an anonymous \$500,000 gift for current-use scholarships in the summer of 2020. Progress has been made on the Organ project with significant gifts from Bill and Gay Solomon, Dodee and Billy Crockett, and the Perkins-Prothro Foundation. Successful scholarship events have been held, most notably Perkins Scholarship Luncheons, which have recently featured speakers such as David Brooks and Judy Woodruff.
- The Perkins School has raised \$20,489,263 in campaign funds. Next spring, the Perkins Scholarship Luncheon will honor Rev. Zan Holmes, renowned former pastor of St. Luke Community United Methodist Church in Dallas. The new Black Africana Church Studies program will also be highlighted.
- Bridwell Library has finished an extensive renovation and we will celebrate with a dedication service on October 6th. The Library recently obtained the entirety of the World Methodist Museum's historical collection which is being appraised, catalogued, and integrated into the Library's collections.
- The Dean and a panel of advisors are revamping the Hispanic Church Outreach Program, under the direction of Associate Dean Hugo Magallanes. The Baptist House of Studies, led by Dr. Jaime Clark-Soles, continues to expand in influence and financial support.

Ms. Connie O'Neill provided the Simmons School of Education Campaign Steering Committee update:

- As the Campaign heads into the public phase, Simmons will be focused on building foundational support for the School by increasing endowments in both number and in value. The Steering Committee is seeking to increase the donor funded annual scholarship awards to lessen the scholarship burden on Dean Knight's unrestricted funds. To achieve these and to raise funds for the School's community engagement projects the Simmons School will look to connecting beyond the loyal SMU donors to include community advocates who support education and enhanced opportunities for those living and learning in the Dallas region.
- Ms. O'Neill pointed out many of Simmons' notable quiet phase accomplishments on the presentation slide. Simmons takes great pride in the role it is playing as a campus leader in research awards and contributing to the achievement of R1. Securing over \$10 million in funding for the West Dallas STEM School project has been significant in launching the STEM School's opening this fall. Innovative and collaborative partnerships, like the newly formed partnership with Children's Health

and Dr. Peter Weyand's sports research, are driving activity in Simmons' academic programs as well as in its community outreach.

- Simmons has raised \$20 million in campaign funds. Most recent gifts include a \$100,000 gift from The Truist Foundation for the West Dallas STEM School and additional major gift support from Carolyn and Rick Wagborne for early literacy educator programs. Not yet accounted for on the chart is the renewed \$3 million from Toyota for implementation of the STEM School project.
- Kicking off the return to in-person experiences, Dallas ISD teachers were celebrated at SMU's season opener football game and on Monday night of this week Simmons' alumni group had a speaker event with Greg Nared from the Dallas Mavericks. Next month there will be a celebration for the opening of the West Dallas STEM School with all the project's partners. In the spring the Simmons School will be holding a do-over for the 2020 Luminary Award recipients. The previous event was canceled due to Covid in March 2020. An initiative the Simmons board will be embarking on this year will be small group meetings with the dean this fall and then rolling the opportunity out to their networks in the spring. This will help the Simmons School grow the donor prospect pool and support reaching its campaign goals.

Mr. Bruce Robson provided the Athletics Campaign Steering Committee update:

- Mr. Robson said SMU Athletics' short-term priorities for the upcoming campaign include the Vision 2025 Football Support Fund, the outdoor pool at Robson & Lindley Aquatics Center, Washburne Soccer and Track Stadium, and Phase Two of the Athletics Facilities Master Plan, which will feature a football operations building and other enhancements to Ford Stadium.
- Mr. Robson highlighted some of Athletics' accomplishments from the Quiet Phase. Athletics has raised nearly \$120 million in gifts and commitments including its second-highest fundraising year with \$20.79 million received in fiscal year 2021. The Vision 2025 Football Support Fund initiative, led by Bill and Liz Armstrong, has raised \$5.25 million in support of football operations. Ray and Heather Washburne pledged \$5 million to begin construction on the Washburne Soccer and Track Stadium. More than \$10M has been committed to build an outdoor pool at the Robson and Lindley Aquatics Center. The Circle of Champions have brought in nearly \$11 million towards athletics operations.
- As of August 30, 2021, Athletics has raised \$384,700 towards endowments, \$34,342,143 towards operating funds, and \$73,452,211 towards capital projects. This adds up to a total of just over \$108 million.
- Athletics intends to build on its momentum as teams are primed for competitive campaigns this year. Ongoing initiatives like the Circle of Champions, Vision 2025 Football Support Fund, Mustang Athletic Fund, and sport-specific Excellence Funds continue to be the foundation for SMU's teams' competitive success.

Mr. Cheves provided the General University update:

- The Taos campus has been closed for close to 2 years. Currently, plans are in place to ready the campus for January Term 22 as well as May and August sessions and the return of our beloved Cultural Institute. While the Covid-19 pandemic continues to present new challenges to a return to normal operations at SMU-in-Taos, SMU staff and faculty continue to prepare and adapt to those challenges so we can welcome SMU students back to the Taos campus as soon as possible.
- A team from SMU toured the Taos campus in July to determine the condition of the campus and what is needed to return it to operating condition. An abatement team is being hired to clean up the campus and prepare for the January 2022 term. SMU Facilities and Maintenance is currently focused on future planning and development of the Taos facility, assessing buildings and planning for future use of current buildings and renovation needs and/or new building opportunities.

- There will be a Zoom event in September to provide an update to Board members and Friends on the state of the campus. There will be a Planning Dallas event in early November to reunite Cultural Institute attendees, announce 2022 Cultural Institute programs, and a Cultural Institute planned for July 2022.
- Mr. Cheves said SMU Libraries continue to support students and faculty, providing services enhancing their academic experience at SMU. Quiet Phase accomplishments include Special Collections acquisitions for DeGoyler, Bridwell and Hamon Libraries, continued stewardship of Special Collections, and completion of Phase One Phase I of the Scholar's Den renovation.
- SMU Libraries current priorities include the SMU Libraries research studio, SMU Libraries endowed Dean position, endowed staff positions, and SMU Library Intern Program Endowment.
- General University Current Priorities include:
 - Scholars Den Renovation (Phase II) – Clements Hall; this renovation will enhance the University Honors student experience.
 - Scholarships and Program Support –The Rotunda Scholars Program aims to help first-year students achieve early success at SMU by promoting academic achievement, leadership, and personal excellence.
 - Engaged Learning Program Support – Program funding for The Office of Engaged Learning will offer resources to students in the areas of research and entrepreneurship.
- Upcoming events include: SMU Libraries Tables of Content on October 23; SMU Friends of the Libraries hosting parents for Family Weekend; Library Executive Board Meeting on October 14; and Kelvin Beachum Private Collection Exhibition in the Hamon Arts Library on February 2022.

Dr. Turner led the Committee through the discussion topic of the Campaign's public phase goals.

- Dr. Turner began by saying since his arrival in 1995, SMU has consistently outperformed in terms of fundraising, and much of the credit goes to the current committee members, their predecessors, and the literally tens of thousands of donors who have given to SMU multiple times over the years in meaningful and sacrificial ways. Dr. Turner said he has shared in the past several ways to document this growth in giving and its impact: in terms of yearly gift revenue; in terms of contributions to the endowment and subsequent distributions; in terms of the transformation of the SMU campus and the University's rise in nearly every measurable area. SMU has much to be proud of, and much to be grateful for.
- Dr. Turner said there was no rest for the weary. Every day a new opportunity or challenge comes along, and every day a new student or faculty expects SMU to prepare them for success. This is why the Committee is here, and why its work together matters.
- Dr. Turner stated today's topic is a daunting one, and a motivational one: what will the campaign launch with tomorrow in terms of financial and programmatic goals? What will motivate SMU's volunteers, alumni, and its base of supporters? Dr. Turner said he and the Campaign Leadership Council (CLC) had a strong case to make this morning and an ambitious and achievable set of targets.
- Dr. Turner said each meeting of this Committee, and really nearly every week with Mr. Cheves, the pie chart of the current campaign total is reviewed. Dr. Turner was delighted to tell the Committee SMU has received over \$654 million in support to date. This is larger than the entire first campaign's total, and over half of what the University did in the entire second campaign. This total, \$654 million, sets a base line for the Committee's discussion today.
- Dr. Turner addressed reasons why SMU was launching a campaign: what the money would accomplish; and what the long-term impact would be on the University, students, faculty, and the community. Dr.

Turner noted Attachment D summarized an ambitious list of programmatic targets broken into three areas: Student Support, Faculty and Academic Support, and Campus and Community Support

- SMU students come first. As seen on the slide, there are several areas the University would like to direct donor investment. Student Support consists of: undergraduate scholarships and graduate fellowships addressing merit and need; programs supporting the recruitment, retention, and graduation of diverse student populations; and internships, stipends, and international study support.
- Faculty are the lifeblood of the University, and supporting their teaching, their research, and their creativity is paramount. Faculty Support consists of support for faculty research and the achievement of highest research designation, new and renovated academic facilities, support for current and new academic programs, Centers and Institutes, new endowed faculty and academic positions, and technology and other academic resources.
- Campus and Community Support consists of support for a competitive Division I athletics program, community engagement programs, student services and resources, and campus-wide facility and technology enhancements.
- All gifts count and will support the financial health of SMU in three ways: endowments for faculty, students and programs (including those supported by planned gifts), current-use funds including scholarships, programs, activities, etc., and capital investments in facility and equipment (including those supported by planned gifts).
- During the entire planning phase there have been plans for an overall target for the campaign, one bigger than the last campaign but achievable. Dr. Turner recalled in each of the past two campaigns the University set a goal and went past it, establishing new overall goals as well as specific funding targets. Dr. Turner hoped SMU would surpass the goal again.
- Dr. Turner pointed brought the Committee's attention to a "straight line" chart which the Campaign Leadership Council (CLC) had been monitoring over the past several months. The straight line leads to the campaign's working goal of \$1.5 billion, again, larger than last campaign.
- Dr. Turner said he and the CLC believed the goal was achievable. Dr. Turner pointed out the red line on the chart showed progress consistently above the goal line, and, although in past campaigns the line had dipped below, overall the trend has been positive and the same is proving true for this campaign toward the \$1.5 billion target.
- Each of the previous two campaigns had a quiet planning phase as well, and at the time of launch over 42% of the kickoff goal had been achieved. The same would be true this time: \$654 million represents 43.6% of a \$1.5 billion goal.
- The CLC reviewed this information at a meeting last week and has come forward with a recommendation summarized on this slide shown: a student support goal of \$450 million; a faculty and academic support goal of \$600 million; and a campus and community support goal of \$450 million. This together totals to the overall financial goal for the campaign of \$1.5 billion

Mr. Ford addressed the resolution:

- Mr. Ford asked the staff to distribute a copy of a resolution, drafted for this Committee's consideration to be presented to the full Board of Trustees the following day. On behalf of the Campaign Leadership Council, Mr. Ford endorsed in the strongest terms support for this proposed set of goals. The Committee, fellow volunteers, and the entire SMU team assembled at the meeting demonstrated the campaign goals are achievable, and the success of the campaign will have meaningful impact on SMU, students, and faculty for generations to come.

- Mr. Ford brought the Committee's attention to a slide showing the language of the resolution proposing the establishment of these goals, to wit:

***Resolved;** the Board hereby establishes the following campaign goals, to be achieved by its planned conclusion in 2028: \$450 million in support of students; \$600 million in support of faculty and academic initiatives; and \$450 million in support of campus and community programs; for an overall financial goal of \$1.5 billion.*

- Mr. Ford entertained a motion to endorse approval of the resolution by the full Board tomorrow, which was seconded with all in favor. The motion was approved. Mr. Ford congratulated Dr. Turner.

Mr. Cheves addressed the Committee's next steps:

- Mr. Cheves said the he and the DEA team were deeply honored by the Committee's action today, and take the responsibility of supporting this endeavor seriously. Mr. Cheves had some acknowledgements he thought appropriate to make at this time.
- Mr. Cheves first acknowledged the leadership of the CLC which has been meeting regularly since the last campaign was completed. The CLC has been helping to plan the new campaign; helping to strategize, recruit volunteers, refine the campaign's vision, and energize and motivate campus constituents. Mr. Cheves asked the Committee to join him in thanking the CLC for their sustained leadership.
- Mr. Cheves said in addition to celebrating volunteers and donors, the Committee would join him in acknowledging the staff supporting their efforts. There are over 150 members of the DEA team, joined by dozens of colleagues across campus, who support the Committee and its entire effort. Mr. Cheves asked the DEA leadership team and their colleagues to stand so their support could be acknowledged.
- Mr. Cheves drew the Committee's attention to Attachment E which lists some of the many plans for kicking off the campaign this week, and taking the campaign on the road across the country. Mr. Cheves invited the Committee to come to his team for any questions about participation or any ideas for additional rollout events.
- Mr. Cheves noted his team will be working with several of the committees heard from earlier to launch various project initiatives over the fall and spring. The Campaign Executive Committee will gather back together before the end of the school year to evaluate the results of the campaign's first several months. Mr. Cheves said to be on the lookout over the next several weeks for various publications, advertisements, media coverage and the like as SMU celebrates the campaign launch with friends and alumni worldwide.

Dr. Turner provided closing remarks:

- Dr. Turner said SMU was excited, ready, and grateful for the Committees support. Dr. Turner said the dinner event held that night would be a major event, not only with the Board of Trustees, but some major donors attending as well. Dr. Turner said the name of the Campaign would be announced. Dr. Turner acknowledged the efforts of all DEA team members in reaching today's milestone, including Mr. Bob Buckner, who has served through the entirety of the previous two campaigns.

Mr. Ford thanked the Committee members for their time and efforts. With no further business, the meeting was adjourned.

**Meeting of the Campaign Executive Committee
May 5, 2022, 9:45 am, Mack Grand Ballroom**

MEETING MINUTES

At 9:45 am, Mr. Gerald Ford called the meeting to order.

- Mr. Ford welcomed members to the sixth meeting of the Campaign Executive Committee, the first since the public launch of the *Ignited* campaign.
- Mr. Ford stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, along with the co-chairs of the Campaign Steering Committees. A complete committee roster was provided as Attachment A of the materials, and minutes of the September 2021 meeting were provided as Attachment B.
- Mr. Ford noted the others who were present: the President's Executive Council, academic deans, the staff leadership of Development and External Affairs, and the Directors of Development supporting the Campaign Steering Committees.

Mr. Ford gave the floor to Dr. Turner for the President's report.

- Dr. Turner thanked committee members for attending the meeting. Dr. Turner said it had been an exciting first year for the Campaign, and much had been accomplished since the last meeting in September.
- At the time of the campaign kickoff in September the goal of \$1.5 billion was announced, with over \$654 million in hand. Among many promotional elements produced at the time was an insert in the *Dallas Morning News*, which recognized many of the historic lead gifts received at the time, including: The Moody Foundation's \$100 million which created the new Moody School; Mr. David and Ms. Carolyn Miller's \$50 million commitment, which, in many ways, defined the subsequent success of the Cox campaign component; commitments from many of the committee members for high priority projects; and several principal gifts supporting campaign priorities. The primary campus event on September 17, 2021 was a wonderful way to launch the new effort.
- In addition to the campus kickoff SMU held a downtown Dallas event, kickoffs in Houston and Atlanta, and the groundbreaking for the Frances Anne Moody Hall.
- Dr. Turner noted the Principal Gift commitments he announced at the December Board meeting:

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|---|---|
| Kim M. Shaddock and William C. Shaddock '74 | Cox School Renovation and Expansion Fund |
| Katy A. Miller and Kyle D. Miller '01 | Cox School Renovation and Expansion Fund (Katy and Kyle D. Miller Courtyard) |
| Anonymous | Funds in Support of ManeFrame III |
| Jo A. Hickman and Family | Robson & Lindley Aquatics Center - Phase II Outdoor Pool (Naming the Hold Hickman Outdoor Pool) |
| Bloomberg Philanthropies | SMU DataArts, The National Center for Arts Research |
| The Deason Foundation | The Deason Criminal Justice Reform Center |
| O'Donnell Foundation | The Peter O'Donnell, Jr. Director of the Data Science Institute |
| Mark C. Griege '81 and Peggy Griege | Cox School Renovation and Expansion Fund |
| Jerry William Pittman '58 | Athletics Endowed Coaching Support (Golf) |

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| Leland B. White '72 and Monica Hillenbrand White '87 | President's Discretionary Fund |
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- Dr. Turner noted the Principal Gift commitments he announced at the February meeting of the Board:

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|---|--|
| Gary A. Weber Foundation | Garry Weber End Zone Complex |
| Anonymous | Cox School Renovation and Expansion Fund |
| Gary T. Crum '69 and Sylvie P. Crum | Cox School Renovation and Expansion Fund |
| John C. Thomas '88 and Wendy Thomas | Thomas House (renaming Daniel House) |
| Hamon Charitable Foundation | Hamon Scholarship Fund, Lyle School of Engineering Hamon STEM Education Programs, Lyle School of Engineering |
| Eula Mae and John Baugh Foundation | Baptist House of Studies Program, Perkins School of Theology |
| Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 | The Judge Elmo B. Hunter Legal Center for Victims of Crimes Against Women Endowment Fund – Endowment and Current-use Support |
| Michael T. McGuire '05 and Natalie K. McGuire | Cox School Renovation and Expansion Fund |
| Morris Foundation (Kenneth R. Morris '72 and Linda A. Morris) | Cox School Renovation and Expansion Fund |
| Belle Stumberg Berg '71 and Donald A. Berg '70, '77 | The Belle and Donald Berg Endowed Research Excellence Fund, Lyle School of Engineering |
| Katherine E. Georgas and William J. Georgas | Cox School Renovation and Expansion Fund |
| The Andrew W. Mellon Foundation | SMU DataArts, The National Center for Arts Research, Meadows School |
| Carl Sewell '66 and Peggy Higgins Sewell '72 | Sewell BBA Scholars |
| Mimi Vanderstraaten and William H. Vanderstraaten '82 | SMU Cox Real Estate Impact Fund |

- There were a number of celebratory events held in the first year: the Garry Weber End Zone gift announcement; a successful Giving Day; the groundbreaking for the Hickman Outdoor Pool; and the dedication of the Washburne Soccer and Track Stadium.
- Dr. Turner then addressed the significant gift from Dr. William S. Spears' announced April 10, 2022 which established the William S. Spears Institute for Entrepreneurial Leadership. Dr. Spears' gift is the largest from a non-alumnus in SMU history.
- Other new principal gifts included:

| | |
|--|--|
| Fritz Duda and Mary Lee Duda and the Fritz and Mary Lee Duda Foundation | Cox School Renovation and Expansion Fund |
| Susan Smith Cooper '62 | Cox School Renovation and Expansion Fund |
| Kelly Hoglund Compton '79 | To be determined |
| Jennifer Tucker Clyde '85 and R. Andrew Clyde '85 and Murphy USA Charitable Foundation | Cox School Renovation and Expansion Fund |
| Harlan R. Crow and Katherine Raymond Crow '94 | Cox School Renovation and Expansion Fund |

Dr. Turner then gave the floor to Mr. Brad Cheves to lead the Committee through updates.

- Mr. Cheves recognized visiting campaign consultant Bob Sweeney. Mr. Cheves said Mr. Sweeney was instrumental in the planning and execution of the *Ignited* campaign, and serves as a resource to the DEA team and the Campaign Leadership Council.

Mr. Scott McLean provided the National Steering Committee update:

- Mr. McLean said as the first year of the public phase of the campaign ends, there had been amazing results in markets across the country. Dallas, Houston, and the State of Texas as a whole accounted for over 80% of fundraising production to date. These results are in alignment with the gift production shown during *Unbridled*, but there is also more growth in other regions across the country.
- Colorado, Florida, Tennessee, Indiana, and Kansas City have all produced over \$7M in campaign support to date for SMU. Those regions have been centers for economic development during the last 5-10 years and SMU alumni, parents and friends are showing strength in their support of the Hilltop. Many of these regions are heavily affected by singular donors at the \$1M+ level. Cities such as Los Angeles, Chicago, and New York continue to have strong donor participation rates, and increases in their campaign dollar totals are expected soon.
- *SMU Ignited* campaign events have taken place in Dallas, Houston and Atlanta during this first year of the campaign. Into the next 12 to 18 months, SMU is actively strategizing about potential campaign kickoff events in Southern California, South Florida, Nashville and New York. An official date had been set for the Southern California kickoff, Monday June 13th at SoFi stadium.
- Through strategic planning efforts by the National Campaign Committee, a new DEA employee was hired to help build major and principal gift relationships in one of SMU's key markets. Mr. Mark Dini '83, is joining the SMU DEA team on August 1, 2022 as the new Executive Director of Principal Gifts, based in Houston. Mr. Dini has a multi-decade career in fundraising, and most recently having served as the Chief Advancement Officer at the St. John's School in Houston. Mr. Dini has deep ties and close working relationships with many SMU Trustees in Houston as well as major alumni and parent donors. Mustangs in the Houston area will be better served due to his new professional connection to his *alma mater*.

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- The Cox School was busy raising money for the Cox renovation and expansion project. The School has raised approximately 79% towards the goal of \$140M and have more news coming soon. At the last Committee meeting, the goal was \$117M but due to inflation, the project had increased to \$140M.
- Another key priority for the School is scholarship support for both undergraduate and graduates. Cox announced a scholarship drive to raise \$30M to support MBA scholarships and has raised \$18M towards the goal.
- The third priority for the Cox campaign is annual support for the centers and institutes. This support allows each center and institute to grow their programs and is a differentiator for the School. One example of a project within an institute proving to be a success is the SMU Cox Real Estate Impact Fund, created by the Folsom Real Estate Institute. Due to key support from Ms. Mimi and Mr. Bill Vanderstraaten, Ms. Ashlee and Mr. Chris Kleinert, and Mr. Bob Tonti, the fund has currently raised \$1.75M.
- Cox has raised \$258M this campaign as of April 30. The groundbreaking will be on May 6, followed by a buffet lunch. Additional building support will be announced at the event.

- On May 13, some exceptional Cox graduates will be honored: Ms. Nancy Loewe, Mr. Garry Weber, Ms. Jessica Boghetich, and Mr. Trey Rome.

Mr. Jon Altschuler provided the Dedman College Campaign Steering Committee update:

- Mr. Altschuler said Dedman College had been a beneficiary of the university-wide momentum created from the launch of the *SMU Ignited* Campaign. This year, Dedman College received gifts of both endowment and revenue, providing an increase of 13% total dollars raised over the previous year. Thanks to the leadership of Dean DiPiero and central administrators at SMU, the College was poised to succeed at levels never experienced in recent history.
- Dedman College's principal gift priorities are endowing the dean, providing graduate and PhD student support, and endowing the human rights program. Each of these initiatives support faculty, students, or programmatic endeavors allowing the mission of the College to be fulfilled with the highest of integrity.
- The College boasts new endowed scholarships in both merit and need across the humanities and sciences.
- Through the Dean's Research Council and other gifts by a current parent, research seed funding has been provided to nine faculty members over the course of the year. The DRC's 11:1 return on investment enables Dedman's faculty and R1 aspirations to succeed.
- In addition, the College's Executive Board has had an increased investment with their giving translating into stronger engagement via time and aptitude. As a result, the Dean's Office and the Board are preparing what could be an official mentorship program for students in Dedman College.
- Thanks to the generous support of Mr. Carl Sewell, the Dedman College Scholars Program continues to thrive and is a main revenue initiative for the College through the campaign.
- Mr. Altschuler reported Dedman College had raised and supported nearly \$33M dollars since the quiet phase began in 2016. The dollars raised for the College are almost perfectly split between revenue and endowment, serving the immediate and long-term needs for the College's students and faculty.
- This fall, the Dean's Office will be traveling to New Orleans and New York City in October to engage both alumni and prospective families. These events will be generously hosted by SMU alumni in those areas.
- The Dedman College Executive Board will continue meeting twice per year, once a semester, with the added Dedman Tour in the Spring giving members a chance to meet faculty and spend time in Dedman's 8 buildings on campus.
- Mr. Altschuler thanked campus leaders for demonstrating great resolve over the last 2 years during the pandemic. Orchestrating and executing a comprehensive campaign spanning both professional schools and the liberal arts and sciences was no easy task. The Committee looked forward to witnessing the impending success of each school uniquely serving every student at SMU.

Mr. Jim Baldwin provided the Dedman School of Law Campaign Steering Committee update:

- Mr. Baldwin said the Dedman School of Law relies on scholarships to recruit top-quality students who will excel in law school. Competition for these students is intense, so scholarships often make the difference in a student's law school choice. They are also critically important in reducing the debt many students face.

- The Law School's three Centers and eleven Clinics provide students with critical experiential learning opportunities. The School's goal is to secure consistent, external funding for these areas to better serve its students and the community.
- Florence Hall is the Law School's primary classroom building and is one of the oldest buildings on campus. This building needed to be replaced with an instructional facility befitting one of the country's very best law schools. There are ongoing discussions with potential lead donors for this project.
- The Judge Elmo B. Hunter Center for Victims of Crimes against Women received an additional \$2M gift from The Hunt family foundation, allowing the Center to hire a staff attorney and expand the resources they can devote to victims and their cases.
- The Robert B. Rowling Center for Business Law and Leadership received an additional \$1.4M in committed funding to expand their program offerings
- The Law School received \$1.6M in endowed scholarship funding, including \$1M from several donors for an Impact Scholarship for students from underrepresented communities or first in their families to attend college.
- A \$1M planned gift and \$100,000 in unrestricted support were given by members of the Law School's executive board.
- Mr. Baldwin turned the Committee's attention to a chart showing the Law School's progress to date. Mr. Baldwin reviewed some upcoming events and opportunities: welcoming the new Dean in the fall, Law alumni 'happy hours' in cities across Texas, and tailgates for two of the SMU home football games.
- Mr. Baldwin thanked Dean Collins on behalf of the Law School CSC for her leadership and service. Mr. Baldwin said Dean Collins was a capable and inspiring leader, and while she would be missed, the CSC wished her all the best as she moved on to the presidency of Rhodes College.

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- New public phase accomplishments include a \$3.1M gift from The Hamon Charitable Foundation to provide continued funding for The Lyle School Hamon Summer Engineering Camp and Lyle School Hamon Scholarship Fund, both through the Caruth Institute for Engineering Education.
- Ms. Linda and Mr. Mitch Hart provided continued operational funding to The Hart Center for Engineering Leadership with a \$2M gift.
- Ms. Paula and Mr. Wally Rhines committed \$1.25M to endow a professorship at Lyle with operational support to allow recruiting in the near future.
- Ms. Belle and Mr. Donnie Berg created The Belle and Donald Berg Endowed Research Excellence Fund to support R1 Initiatives with a \$1M pledge.
- As of April 29, Lyle's campaign total is \$30.7M, with \$13.3M in endowed giving and \$17.3M in operational giving. Additional commitments, including the Rhines' \$1.25M commitment, have not yet been included in this total.
- Upcoming events include a donor celebration in the fall and a Lyle football and basketball suite for all home games.
- The Lyle School's next CSC Meeting will be held on October 13.

- Dr. Lyle thanked Dean Marc Christensen on behalf of the Lyle School CSC for his service as he moved on to be the 17th President of Clarkson University.

Ms. Jennifer Altabef provided the Meadows School of the Arts Campaign Steering Committee update:

- Ms. Altabef said 87% of graduating Meadows students from the 2019 and 2020 classes either secured employment or continued their education within six months of graduation. Of those, 85% are employed in a field related to their degrees. For an arts school, those are particularly impressive numbers
- Ms. Altabef highlighted some accomplishments the Meadows School was proud of:
 - Professor Greg Warden will be returning to Dallas from Switzerland to assume the role of the Mark A. Roglan Director of the Custard Institute for Spanish Art and Culture.
 - The first phase of the Owen Arts Center renovation is 92% complete. The second phase will renovate a number of the performing arts disciplines as well as corporate communications and public affairs facilities.
 - At the Meadows at the Meyerson event in March, with the help of Ms. Debbie Tolleson and Ms. Julie Butler as chairs, nearly \$400,000 was raised for scholarships to merit based-high financial need students.
 - There are new named endowments from Ms. Anne and Mr. Hank Paup as well as Mr. Michael Aurbach.
- The Meadows School has raised \$51.7M towards the campaign, and has ambitious goals for what lies ahead. Operating dollars lead the way with \$20.6M, followed by endowment fundraising at \$14.2M, and there are \$1M in gifts yet to be designated.
- Ms. Altabef highlighted some upcoming events:
 - The Meadows Commencement will take place on May 14. Mr. John Holiday '07 will be the speaker and performer. Mr. Holiday is a finalist on the television show the Voice, with a diverse career spanning from jazz to the Metropolitan Opera in New York.
 - The exhibit featuring works of Spanish master Bartolome Murillo at the Meadows Museum runs to June 12.
 - On October 22 Ms. Emily Graham '07 will receive SMU's Emerging Leader award. Ms. Graham is the Chief Equity and Impact Officer at Omnicom Group, a Fortune 500 company based out of New York.
 - The Owen Arts Center dedication is expected to take place in mid-September.

Ms. Julie Yarbrough provided the Perkins School of Theology Campaign Steering Committee update:

- Ms. Yarbrough said the primary goal was student scholarships. Perkins students do not transition into high-paying fields, and therefore potential debt is a huge factor in deciding where to go to seminary. Anything done to mitigate debt makes SMU more attractive to potential students.
- Planned giving is being emphasized in the campaign. Quite a few members of the Executive Board have taken advantage of the various gift planning tools available under the IRS tax code.
- Funding for the Caren and Vin Prothro Organ is almost finished, which will be installed in Perkins Chapel. Ms. Gay and Mr. Bill Solomon initiated the funding with a million-dollar gift in 2019 and have been joined by other significant commitments. \$140,000 is left to complete the project.
- Ms. Yarbrough noted several significant accomplishments during the public phase of the campaign:
- The John and Eula Mae Baugh Foundation pledged \$2,700,000 over three years to fund scholarships and activities of the Perkins Baptist House of Studies. 82% of the funds will be used for scholarships and emergency aid for students.

- Ms. Judy and Mr. Jim Gibbs established a significant scholarship endowment for Perkins Masters-level students. This was part of a \$450,000 gift to Perkins which also included funding for the Prothro Organ and the Black/Africana Church Studies Program scholarship fund.
- In March the School hosted the annual Bolin Family Perkins Scholarship Luncheon which paid tribute to Rev. Dr. Zan Holmes. SMU Trustee Rev. Richie Butler was the keynote speaker. All net proceeds went to the Black/Africana Church Studies Program scholarship fund.
- Perkins continues the process of appraising the incredible collection of materials from the World Methodist Museum donated in the last fiscal year. When the appraisal process is complete, it will significantly add to the Perkins campaign total. More importantly, it will be a magnet for scholars of Wesley studies to come to the SMU campus to be involved in research projects. The Bridwell Library finished an extensive renovation project, and Ms. Yarbrough hoped members of the Committee would find an opportunity to visit.
- The Dean and a panel of advisors continue to revamp the Hispanic Church Outreach Program, under the direction of Associate Dean Hugo Magallanes in consultation with Bishop Cynthia Fierro Harvey, President of the United Methodist Council of Bishops and a Perkins graduate.

Mr. Richard Collins provided the Simmons School of Education Campaign Steering Committee update:

- Simmons' priorities are focused on raising funds for graduate student scholarships, most importantly for teachers and educational leaders. The Committee aims to strengthen the school's foundational support by building the endowments and focus continues on the School's robust community outreach initiatives, like the West Dallas STEM School.
- The Simmons School is a campus leader in research awards and contributing to the achievement of R1 with more than \$20M in research awards this year. In three years, the Simmons School has risen from #105 to #54 among private and public graduate education schools in *US News & World Report* rankings. Among private education schools, Simmons is #1 in Texas and #1 across all of the southwest.
- Recent gifts include a scholarship fund for the future graduates of West Dallas STEM School to attend SMU. Ms. Carolyn and Mr. Preston Butcher contributed to the fund and SMU's Student Senate has made a generous annual commitment to it as well. Simmons' student leaders advocate for student scholarships, engage with Dallas ISD students as mentors and volunteers, and ensure opportunities are in place for all students to have success once here.
- A new endowed scholarship has been created by Ms. Cathy Zollars, a Simmons CSC member, honoring her and her late husband's passion for STEM and education. Also, the Hohlt Family has endowed a Sport Management scholarship. Long time early literacy supporters Ms. Carolyn and Mr. Rick Waghorne have renewed support for a 9th cohort of graduate teacher scholars.
- The Luminary Awards honored Big Thought, Girl Scouts and the Carnegie Foundation,
- The School also announced a significant commitment from Toyota committing for their Driving Possibilities campaign to replicate the West Dallas school model across the nation.
- Simmons has raised \$24.3M in campaign funds. In alignment with the School's focus on the high need for scholarships, a short term, intensive initiative is being launched with the campaign committee and executive board named Simmons 25 by 25 to raise \$1M for graduate student scholarships by 2025.
- The inaugural Simmons on the Lawn alumni and friends event will occur on May 28. Next fall there will be donor introduction events with new faculty and center directors and will continue to hold the small group meetings with Dean Knight. The executive board fall meeting will be on September 29.

- Simmons is experiencing great momentum. Research and rankings are the result of the many great activities and people in the school, the Executive Board is engaged and interested, community collaborations are strong, and fundraising is on an upward trajectory.

Mr. Bruce Robson provided the Athletics Campaign Steering Committee update:

- Athletics' priorities for the Campaign include:
 - The Garry Weber End Zone Complex
 - Conference Realignment Task Force
 - Circle of Champions and Vision 2025
 - And the Institute for Student-Athlete Success
- Mr. Robson highlighted some of Athletics' accomplishments from the public phase:
 - Mr. Garry Weber's \$50M gift to kick start the Garry Weber End Zone Complex project, the largest gift in the history of SMU Athletics.
 - Mr. Jerry Pittman's \$2M gift to endow the SMU Men's Golf Head Coach position, the first endowed head coach position in the history of SMU Athletics.
 - Ms. Liz and Mr. Bill Armstrong's \$2M gift to spearhead the Vision 2025 initiative which has raised over \$7M in total.
 - Athletics brought in over \$709K in another record-setting Giving Day
 - There were two Athletics facilities events: the groundbreaking of the Holt Hickman Outdoor Pool at the Robson & Lindley Aquatics Center and the dedication of Washburne Soccer and Track Stadium.
- Athletics has raised over \$169M for the *Ignited* campaign as of April 30.
- The fundraising momentum for the \$100 million Garry Weber End Zone Complex project continues. This project will be transformational for the program and will consume a majority of Athletics' fundraising efforts as there is a tentative groundbreaking date set for December 2022.
- The Institute for Student-Athlete Success is part of the Athletics Master Plan and is another instrumental initiative in the department's competitive success.

Mr. Cheves provided a quick update on some of the areas extending across the University, beginning with SMU-in-Taos.

- Mr. Cheves reported the SMU-in-Taos campus welcomed 60 students to JanTerm 2022. Despite snowfall on New Year's Day and the campus losing power for a few days, all reports indicate it was a very successful start to a reopened campus. The campus was ready for May, June and August terms as well as the return of the Cultural Institute.
- Campaign priorities include: New Strategic Assessment for Campus Renovations Program; Program Support Funding; and Academic Scholarships.
- Registration was underway for all three sessions in May, June, and August. The Cultural Institute 2022 would be on July 21 – 24.
- The Taos Executive Board would meet on July 21st.

Mr. Cheves provided the SMU Libraries update:

- SMU Libraries continue to support students and faculty by providing services enhancing their academic experience at SMU. The Library garnered great press in February when the "Narrative as Reality" exhibition opened at Hamon Arts Library. SMU's very own Ms. Jessica and Mr. Kelvin Beachum

welcomed over 150 guests to the opening night reception. Two of the featured artists visited campus in the spring to meet with students and classes to discuss their work. In March, the libraries welcomed James Beard Award-winning food writer Mr. Adrian Miller to campus to receive the Literati Award at the annual Tables of Content fundraiser for Friends of SMU Libraries.

- Special Collections Acquisitions for DeGolyer, Bridwell and Hamon Libraries include Archive of Time/Life photographer Shelly Katz with over 200,000 prints and slides from 1960-2000; Archive of cartoonist Marian Henley, creator of the offbeat “Maxine” series, and the World Golf Hall of Fame Collection consisting of over 4,000 books, pamphlets, and ephemera. Upcoming exhibitions include “Send me a Postcard” in DeGolyer Library and “In Search of Belonging” at Hamon Arts Library. The Business Library’s new home will be in the basement of Hamon Arts Library during the renovation of Cox School of Business.
- Mr. Cheves listed SMU Libraries’ current priorities: SMU Libraries – Digital Scholarship Center, SMU Libraries Endowed Dean position, Endowed Staff positions, Library Intern Program Endowment, and the Special Collections Conservation Program Endowment

Mr. Cheves provided the Student Affairs update:

- Campaign Priorities include: Religious Life & Social Change Intercultural Engagement, Campus Experience, General Capital Improvements, Wellness Programs, and Spirit Programs.
- Mr. Cheves reviewed Student Affairs’ campaign accomplishments:
 - Naming of the Thomas House
 - Numerous donor namings in Hughes-Trigg for suite, office and meeting room spaces
 - Major Gift commitment for Polo Club operational support
 - Funding of endowment to support SMU Wellness and Recovery
 - Student Senate and IFC support for scholarship and grant awards
- Mr. Cheves reviewed upcoming events and opportunities: the Crane Leadership Launch, Hilltop Excellence Award Ceremony, and the Mothers & Dads Club Outstanding Senior Man and Woman Reception

Mr. Cheves gave the floor to Dr. Turner to lead the Committee through the discussion topic of student support.

- Dr. Turner stated the campaign goal of \$1.5 billion was divided into the three components: Student Support, Faculty and Academic Support, and Campus and Community Support including athletics. Dr. Turner wanted to update the Committee on the Student Support component and introduce a new funding opportunity for donors.
- SMU has been very successful in soliciting support for its students across all schools and units, and centrally. Of the \$450M goal, the University stands at 39% representing over \$175M in commitments. In the last campaign, 689 newly endowed scholarships were established, and nearly \$280 million was provided in student scholarships and support combined. SMU is on track to exceed those earlier results.
- There are several ongoing, evergreen ways scholarships are solicited. SMU has been successful in soliciting student support through school-based merit scholarships; graduate fellowships; its new commitment to the Black Unity Forum; as well as restricted scholarships targeted to students with certain talents, interests, background or geography. The University was grateful for all the donors who have supported these scholarships.
- Dr. Turner announced a new program being adding to those funding options, called Opportunity SMU. As noted, the purposes of Opportunity SMU are to support the strategic recruitment of highly qualified students, regardless of need; to support their transition to college life, beginning in their first year; and to provide them with retention and graduate support. Donors will be offered the option of pooling their gifts together into an endowed Opportunity fund and a current-use Opportunity fund, providing flexibility to the Office of the Provost and the Office of Undergraduate Admission as they design recruitment and support programs to meet our admission objectives.

Mr. Cheves then reviewed upcoming campaign events:

- May 6 – Cox Groundbreaking
- June 13 – Los Angeles Kickoff event at SoFi Stadium
- September – Owen Renovation and Expansion Dedication
- December 2 – Garry Weber End Zone Complex Groundbreaking
- September 15 2023 – Dedication of Frances Anne Moody Hall
- These signature events are in addition to ongoing regional events, special announcements, and volunteer meetings which will continue to occur.

Mr. Cheves gave the floor to Mr. Ray Hunt to provide campaign results.

- Mr. Hunt thanked the Committee for their generosity and service. Mr. Hunt said the sustained period of continuous record-setting gifts was unprecedented. Immediately after the *Unbridled* campaign launched, the economy took a turn, and the University successfully pivoted to a broader outreach strategy, and corrected course later when things turned around. This has not been the case with the *Ignited* campaign. There have been a sustained drumbeat of large commitments, some from continuing donors and some from new donors, with more individuals and organizations are being engaged than ever before.
- Mr. Hunt was pleased to announce the campaign total: \$880,862,184, or 58.72% of the entire goal.
- Mr. Hunt directed the Committee's attention to a chart showing the Campaign's progress to date compared to the overall goal. Progress has been "above the goal line" which was expected to continue as the campaign progressed.

Mr. Hunt gave the floor to Dr. Turner for a special announcement.

- Dr. Turner said the groundbreaking ceremony for the Cox complex would take place Friday, May 6. The University was grateful to its many donors and to many of the Committee members for making the event possible. Even though the goal for the project had to be raised, the amount raised would be 80% by the time of the groundbreaking.
- The path to success was not evident at the beginning of the quiet phase of the Campaign. In determining the overall goal of the Campaign as well as the size of the Cox facility project, two things had to be considered: first, the scope of the capital project and second, to ensure the Cox campaign was balanced and student support would remain a vital part of the Campaign and a high priority.
- Mr. David Miller saw the importance of launching the Cox campaign with the right energy and with the right priorities out front. Dr. Turner stated it was a tremendous day when the Millers' \$50M commitment to Cox was announced, divided between the facility project and MBA scholarships. Dr. Turner said the Millers had stepped up to support a number of the University's priorities with very significant and generous gifts – to athletics, to Taos, to the Business School, and many other areas. They give of their resources, of their time, and of themselves. Mr. Miller signed on for even more with his assumption of the chairmanship of the Board.
- Dr. Turner was pleased to announce the attendees of the groundbreaking ceremony would be informed, because of Mr. Miller's significant contributions of time and resources to SMU, the entire Business School complex will be named the David B. Miller Business Quadrangle at the Cox School of Business. SMU's only other named academic quadrangle was the Charles and Elizabeth Prothro Theology Quadrangle at the Perkins School.

Images of various aspects of the Miller Quadrangle were shown to the Committee.

With no further business, the meeting was adjourned.

**Meeting of the Campaign Executive Committee
December 1, 2022, 10:30am, Mack Grand Ballroom**

MEETING MINUTES

At 10:30 am, Mr. Gerald Ford called the meeting to order.

- Mr. Ford welcomed the Committee members to the seventh meeting of the Campaign Executive Committee, the second since the launch of the *Ignited* campaign.
- Mr. Ford stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, seated to his left and right, along with the co-chairs of the Campaign Steering Committees, seated around the open table. A complete committee roster was provided in Attachment A of the materials, and minutes of the May meeting were provided in Attachment B.
- Mr. Ford noted others present: the President's Executive Council, academic deans, the Director of Athletics, the staff leadership of Development and External Affairs, and the Directors of Development supporting the Campaign Steering Committees.

Mr. Ford gave the floor to Dr. Turner for the President's report.

- Dr. Turner thanked the Committee for attending the meeting. In September, SMU celebrated the one-year anniversary of the *SMU Ignited* campaign kickoff with over \$900 million having been received at the time. At homecoming, a reception was held for the University's major and principal gift campaign donors, and the most recent annual report listed all 131 donors who had contributed \$1 million or more to the Campaign. Over 52,000 donors had made contributions of all sizes. The momentum continued through the fall with a number of new significant gifts.
- Dr. Turner reviewed several additional Principal Gift commitments announced at the September Board of Trustees meeting:

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| Deason Foundation/Doug Deason | Darwin Deason Institute for Cyber Security Endowment Fund, Deason Innovation Gym |
| Estate of Cary M. Maguire | Cary M. Maguire Center for Ethics and Public Responsibility, Maguire Energy Institute Endowed Program Fund |
| The Cain Foundation | The Cain Denius Business Law Boot Camp Endowment and Current-use support |
| J. Timothy Brittan | Equestrian Program |
| Ann and Brad Brookshire | Brookshire SMU/Tyler Junior College Transfer Scholarship (Cox) |
| Bert A. Getz '89 and Susan Getz | Cox Renovation and Expansion Fund |
| Charles Koch Foundation | Operational support for The Deason Criminal Justice Reform Center |
| Mark S. Moussa '80 | Visual Arts Facilities Renovation |

- Dr. Turner announced new Principal Gift commitments received over the fall:

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|-----------------------------|--|
| Liz and Bill Armstrong | Weber End Zone Complex, Dedman College Dean's Position, spirit and cheer program |
| Jennifer and Marty Flanagan | Weber End Zone Complex |
| William Ware | Weber End Zone Complex |
| Paula and Walden Rhines | Professorship in Quantum Informatics, Lyle School |
| Anonymous | Perkins School (scholarships and purpose TBD) |
| Kathleen and David Grieve | Purpose to be determined |

- There were several announcements and celebrations held during the fall. Images of the Cox renovation and expansion project groundbreaking were shown. At the groundbreaking event, it was announced the Cox quadrangle would be named in honor of Mr. David Miller.
- In September, a dedication ceremony was held for the new visual arts facilities in the Meadows School and in October a pep-rally was held the night before the TCU game at which the Armstrongs' gift to the Weber End Zone Complex was announced. The Armstrong announcement was followed shortly by the announcement of a second Armstrong gift, endowing and naming the Dean's position in Dedman College. The following day the Garry Weber End Zone Complex groundbreaking took place.

Mr. Cheves thanked campaign consultant Mr. Bob Sweeney for joining the meeting as well as the groundbreaking the following day. Mr. Cheves introduced the Committee to Mr. Mark Dini, the new Executive Director of Principal Gifts based in the Houston area.

Ms. Jeanne Phillips provided the National Steering Committee update:

- Ms. Phillips said at the conclusion of the first year of the public phase of *SMU Ignited*, there were already amazing results in markets across the country. Dallas, Houston, and the State of Texas as a whole accounted for over 80% of fundraising production to date. The early results were in alignment with the gift production shown during the *Unbridled* campaign, and there was growth in new areas Ms. Phillips wanted to highlight. New York/Connecticut, Colorado, Nashville, Indiana, and both Western and South Florida had all produced over \$8M in campaign support to date for SMU.
- Those regions had all been centers for economic development during the last 5-10 years and SMU alumni, parents, and friends were showing strength in their support of the Hilltop. Regions such as Chicago, Atlanta, and Southern California continue to have strong donor participation rates, and increases in their campaign dollar totals were expected.
- The national rollout for the campaign had three upcoming events being planned:
 - The first will be a high-level donor event in the Palm Beach, Florida area in early 2023. Recent Distinguished Alumni Award recipient Mr. John Phelan, as well as National CSC member Mr. Scott Johnson, were helping to guide SMU's strategic efforts in the area.
 - Next, an official launch of *SMU Ignited* in Nashville was tentatively scheduled for April of 2023.
 - Wrapping up the spring schedule of events, there were early conversations about an event in New York. As SMU continues to develop stronger alumni and parent relationships on the East Coast, the hope is to identify the perfect venue and audience for an event in Manhattan.
- Ms. Phillips encouraged the Committee to pass along the names of key leaders who would be ideal members of the National Campaign Committee.

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- Mr. Bridwell said \$111M toward the \$140M goal for the Cox renovation and expansion project has been raised. There were still many key naming opportunities available at various levels. Specifically, focus is on naming opportunities at the \$5M, \$2.5M and \$1M levels.
- The MBA scholarship drive had raised \$18M towards the \$30M campaign goal. Scholarships were crucial to Cox, as they ensure the School is able to attract and retain high quality MBA level students.
- Another campaign priority for the Cox School is programmatic annual support for Cox Centers and Institutes, which are a key differentiator for the School, serving as resources to the University and community. The Diplomacy Initiative in Dallas is a vision of establishing a center for commercial corporate diplomacy in Dallas. For the past three years, the U.S. Diplomatic Studies Foundation had been collaborating with SMU Cox Executive Education to develop a program which would combine seminar

experiences and case studies on topics such as commercial diplomacy, international corporate strategy and economic statecraft. The School looked forward to growing this partnership and vision even further.

- The Folsom Real Estate Institute created The Cox Real Estate Impact Investment Fund. This initiative provides Cox students with an experiential learning opportunity centered around private equity investing and investment management. Returns from the fund will be split equally between future support of the fund's diverse investments and a new scholarship program to benefit real estate-focused students at the Cox School.
- Cox received some significant gifts since the last CEC meeting:
 - Ms. Ann and Mr. Bradley Brookshire established The Brookshire Endowed Scholarship. Gift for the Cox Renovation and Expansion from Ms. Sylvie and Mr. Gary Crum, Ms. Mary Lee and Mr. Fritz Duda, and the Getz Family and the Globe Foundation
- Cox has raised just over \$263M as of the end of the October.
- Mr. Bridwell reviewed upcoming events for the Cox School:
 - Various receptions across the country with Cox alumni and prospective students were taking place in Atlanta, New Port Beach, New York City, and Nashville.
 - On February 15th and 16th the Cox School would host the Maguire Energy Institute Symposium in conjunction with the Bush Institute, convening with the L. Frank Pitts Awards Dinner on February 16th.
 - The building project is still on target to open in May of 2024, with classes beginning in the new building following August of 2024.

Mr. Jon Altschuler provided the Dedman College Campaign Steering Committee update:

- Mr. Altschuler said three major campaign priorities for Dedman College were naming and endowing the Human Rights Program, supporting graduate students and faculty through research initiatives and increasing support for the Dedman College Scholars Program
- Mr. Altschuler announced Ms. Liz and Mr. Bill Armstrong created a transformational gift by endowing and naming the Elisabeth Martin Armstrong Dean of Dedman College. Mr. Altschuler congratulated Dean DiPiero for being the inaugural holder of the position, and he thanked the Armstrongs for investing in Dedman College.
- This summer, the Tower Center hosted the most successful Medal of Freedom dinner ever, netting over \$1M. These funds will serve as the operating revenue for its students and staff over the next two years.
- Since the *Ignited* campaign began, the College celebrated new endowments supporting the Dean's Research Council and the Dedman College Scholars program. This year continues this tradition, as Mr. Carl Sewell for provided a matching gift for the Scholars program.
- Resulting from the Board's feedback in the April 2022 meeting, the College created and would be rolling out a mentorship program for undergraduate students. Board members and constituents had already been placed with student applicants, and the program would officially begin in January of 2023.
- In the quiet and public phase of the campaign, Dedman College raised and secured over \$40 million dollars, mostly allocated towards endowments. There were investments towards the College's operational initiatives which sustain the integrity of the College's academic programs.
- Next semester, there would be several opportunities for volunteer partnership:
 - This Spring, the Dean's Research Council will host its annual meetings, awarding much deserved research seed feeding to faculty in both the humanities and sciences.

- The Executive Board will have two gatherings next semester: a facilities tour in March followed by the formal Board meeting in April.
- The CSC will close out the semester with a reflection on successes from this year and aspirations for the next fiscal year.

Mr. Jim Baldwin provided the Dedman School of Law Campaign Steering Committee update:

- Mr. Baldwin welcomed the new Dean of Dedman Law, Mr. Jason Nance. Mr. Baldwin said Dean Nance quickly met many alumni and friends and was a welcome addition to the Hilltop. Mr. Baldwin participated in an alumni trip with Dean Nance to Washington D.C. There, several SMU Law alumni were admitted as members of the Bar of the Supreme Court of the United States. Afterwards, they listened to oral arguments together, sitting only a few feet away from all nine U.S. Supreme Court justices.
- Dedman Law received some very impactful gifts throughout the year benefitting the Cain Denius Business Law Boot Camp Endowment, the Deason Criminal Justice Reform Center, and the Moot Court 1st Year Competition.
- Mr. Baldwin said Dean Nance brought focus to Dedman Law's fundraising priorities, which were centered on a few key areas necessary to help the Law Schools' reach its full potential and thrive in the coming years. One priority was scholarships. The Law School needed additional resources to create a more competitive scholarship program to attract highly credentialed students who would become influential leaders in the legal community and later have the capacity to invest in Dedman Law. Many current alumni who now had this capacity received full scholarships to attend the Law School. Those alumni would have most likely attended another institution without a full scholarship. Scholarships attract future leaders who will have high capacity to give as their careers mature, and are an investment in the Law School's future.
- A second fundraising priority was facilities. The Law School needed to renovate its facilities so they adequately reflect the quality of the Law School's academic programs, attract highly credentialed students and faculty, create an optimal environment for Law School education and student outcomes, and allow Dedman Law to compete with its peers and aspirational peers.
- A third priority was operational funds. The Law School aimed to lower its class size to align with peer institutions. Increased operational funds would also enable Dedman Law to provide enhanced programming to further its educational and research missions.
- Endowments to support chaired positions help attract and retain talented faculty members in key areas such as business and corporate law, intellectual property, artificial intelligence, cybersecurity, data analytics, and biotechnology. Some of these hires will be joint hires with other schools of SMU, which would facilitate increased collaboration across the University and develop pipelines to attract students to Dedman Law with technical backgrounds.
- Dedman Law campaign's total is at just over \$26M.
- Several upcoming spring events coming up included:
 - Louise Ballerstedt Raggio '52 Endowed Lecture - March 9
 - Dedman Law Distinguished Alumni Awards - March 30
 - Executive Board, CSC, and Emerging Leader Board Meeting - April 13
 - 75th Anniversary of SMU Law's Clinics - Spring 2023
 - Alumni Texas Tour (Austin, Ft. Worth, San Antonio, Houston)
 - Law Firm Challenge - TBD

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- Dr. Lyle said the School's campaign priorities continued to be scholarship, fellowship and Ph.D. support, core values exhibited by its Centers and Institutes, and research initiation funding. The Lyle School was especially focused on Ph.D. and post-doctoral support.
- Since the last CEC meeting, the Lyle School had several new public phase accomplishments, including a \$2.5M dollar investment from The Deason Foundation, of which \$2.25M would go towards the Darwin Deason Institute for Cyber Security and \$250K to the Deason Innovation Gym. New Lyle Executive Board and CSC member Mr. Wally Rhines established The Walden and Paula Rhines Professor of Quantum Mechanics with a \$1.25M Investment and CEO Bill Stuart of Dallas-based Photonics start-up Photodigm created a Ph.D. Fellowship in the Photonics Department with a \$250K operational investment. The Ray Marr Foundation continued its support of Lyle with a \$100k gift to the Lyle Undergraduate Scholarships
- As of October 31, 2022, Lyle's campaign total was over \$35M, with \$14.49M in endowed giving and \$20.4M in operational giving.
- Dr. Lyle said the School had a fantastic donor appreciation event on September 18th at Café 43 in the Bush Presidential Center for its major investors and board members. The attendees heard from Dr. Turner, Provost Lobo, Dean Kruger, Vice President Cheves, and Board Vice Chair Rich Templeton. The event was a first-of-its-kind in the Lyle School and was solely for the purpose of saying "thank you" to the School's supporters and cultivating their continuing engagement in the years ahead. There was outstanding feedback from those who attended the event.
- Upcoming events included a Private Research Colloquium for donors of Lyle's Research Impact Fund in May 2023.
- The Lyle Executive Board would start the Lyle Industry Mentoring Program to mentor undergraduate and graduate students in the various stages of entrepreneurship starting in Spring 2023.
- The Lyle development team would be hosting the Lyle Suite for the Memphis, Houston, and Cincinnati home basketball games in Spring 2023.
- Lyle's next Executive Board Reception and Meeting would be held on April 27th and 28th and the Lyle Campaign Steering Committee Meetings would be held on December 16, 2022 and April 13, 2023

Mr. Marvin Singleton provided the Meadows School of the Arts Campaign Steering Committee update:

- Mr. Singleton said he hoped many of the Committee members visited the Meadows Arts complex on September 16th for the dedication ceremonies, celebrating the much-anticipated opening of the stunning new visual arts center at Meadows. From the new entrances and gallery spaces to the updated classrooms and studios, Mr. Singleton said the project breathed new life into a very important building on campus.
- Some notable gifts were made in the late summer months prior to the dedication, for which the Meadows School was very grateful. Specifically, Mr. Mark Moussa named the Foundations Art Studio, which was one of the busiest, and therefore, most wonderfully cluttered and creative rooms on campus.
- Ms. Peggy and Mr. Carl Sewell named the suite for the Algur H. Meadows Dean, which was a truly beautiful space facing the Boulevard on the ground floor of the building. The William B. Jordan Gallery – a collective effort from members of the board community philanthropists, and alumni – had been fully funded.
- Meadows was close to achieving its total goal for the phase of the campaign, with some studio and office spaces left to be named. In addition to capital efforts, the Meadows School was focused on planned gifts. Alumna Ms. Eleanor Williams generously wrote the School into her estate plans to create a student scholarship. Camm Maguire Jr. recently donated a concert grand piano to the music department, which was being used regularly and made a wonderful addition to the piano collection.

- In addition to the recent gifts to the visual arts center renovation, Mr. Singleton wanted to recognize all the major and principal donors to the effort. Mr. Singleton specifically thanked Ms. Caren Prothro for giving so much of her time and treasure, and always being willing to do whatever it took to get the job done.
- Meadows' campaign total was nearly \$55M, with a fairly even distribution of funding towards operation, endowment, and facilities. As the School moved to the next stage of priorities in the campaign, it would actively seek lead gifts which would certainly be newsworthy as they come to fruition.
- Finally, Meadows always held a myriad of performances and exhibitions on the calendar. Mr. Singleton highlighted Meadows at the Winspear, which was the annual fundraiser for the Meadows Impact Scholarship Fund. This year would combine music with dance in what will be a spectacular performance on March 9th. Tickets would range from \$2,500 to any amount an attendee was willing to pay.

Ms. Julie Yarbrough provided the Perkins School of Theology Campaign Steering Committee update:

- Ms. Yarbrough said the Perkins School's priorities had not changed since the last CEC meeting. Included were:
 - Student scholarships, both current-use and endowed funds.
 - Continuation of the Perkins Scholars Program, which increases financial aid awards for outstanding M.Div. students to 100% of tuition.
 - Installation of the Caren and Vin Prothro Organ in Perkins Chapel by the next fall.
 - Perpetuation of the Baptist House of Studies, which funds 10 full-ride scholarships for Baptist students in various degree programs at Perkins.
 - An endowed archivist/curator position in Bridwell Library for the World Methodist Museum materials and other Wesley related items.
- Perkins received some significant gifts since the last meeting:
 - An anonymous \$500K pledge for current-use scholarships geared toward students from the North Texas Conference of the United Methodist Church.
 - An anonymous \$500K pledge for a new endowed student scholarship fund.
 - The Baptist House of Studies area in Selecman Hall was furnished and functioning thanks to the John and Eula Mae Baugh Foundation gift.
 - The \$2M funding had been completed for the Caren and Vin Prothro Organ, which will be installed in Perkins Chapel by late fall of next year.
- Perkins raised over \$28M so far in the *Ignited* campaign. The amount did not include the World Methodist Museum gift which had not been totally appraised. It was expected the appraisals will be completed and in the Perkins totals by the next CEC meeting.
- Upcoming events and opportunities included:
 - A farewell to Dean Craig Hill and a celebration of his work with the Perkins School during the last six and a half years.
 - Welcoming Bishop Mike McKee as Interim Dean as of January 1, 2023. A transition team at Perkins was already at work with him in preparation for the next stage in his ministry.
 - Holding the Public Life Personal Faith Luncheon featuring former Dallas Independent School Superintendent, Dr. Michael Hinojosa, on March 28, 2023. Proceeds from the event would go to the Hispanic Scholarship Initiative.

Ms. Connie O'Neill provided the Simmons School of Education Campaign Steering Committee update:

- Ms. O'Neill said the Simmons School continued to be focused on raising funds for graduate student scholarships, most importantly dedicated for teachers and educational leaders. Whenever possible, the School would mirror the successful cohort model seen with the Bishop Scholars. There were two such

areas needing major gift support, one for STEM/SPED teachers and one for aspiring principal leaders in Dallas ISD.

- With an emphasis on research to practice the opportunities to support the TEIL (Technology Enhanced Immersive Learning) faculty cluster with professorships are priority, as well as some of naming the most active centers and their associated directors.
- Last spring, the Simmons School launched the *25 by 25* scholarship campaign to provide a framework around talking about scholarships, with a goal of raising \$1M+ for graduate student scholarships. Scholarships were important to student recruitment and with significant support could drive notable impact to a school district and to the education system. \$375K had been raised towards this initiative, including most recently, a generous gift from new Simmons board member Ms. Jacquelin Sewell and Mr. William Atkinson.
- Other recent gifts included an additional scholarship gift from Mr. Preston and Ms. Carolyn Butcher to support first-gen, need based students at SMU. The gift aligned with the campus initiative of Access SMU and the West Dallas STEM School college and career readiness activities. The gifts helped assure funds were available to those students coming from Dallas ISD who want to pursue degrees at SMU.
- The Sport Management degree program in the Simmons School was one of the fastest growing and largest on campus. Two new endowed scholarship gifts were received from parents, as well as additional gifts for operational funds. The program funds helped take a group of students to Spain the past summer to participate in a study abroad experience with Formula One Racing.
- The School continued to focus attention on robust community outreach initiatives like the West Dallas STEM School. The West Dallas STEM School was in a new partnership with Texas Health Resources to open the counseling clinic in the West Dallas STEM School the following fall. In collaboration with the Dedman Law School and Dean Nance, the opening of a law clinic was being planned as well, for which fundraising would begin soon. With all happening locally with the West Dallas STEM School, combined with Toyota replicating the model in 15 national sites, the project was a showpiece for SMU.
- Ms. O'Neill said the Simmons School's campaign total was \$26.3M.
- The Inaugural Simmons on the Lawn event was hosted for alumni and friends on Memorial Day weekend and in the fall the traditional Homecoming tailgate on The Boulevard take place.
- The newly merged Graduate Liberal Studies and Dispute Resolution department would hold a holiday celebration with their combined alumni later in the month. In 2023, departments would host varied speaker events to highlight research activity. The spring Board meeting was scheduled for April 5 at the West Dallas STEM School, with a school tour and lunch with the staff and teachers.
- Simmons was experiencing great momentum, research activity was robust, and rankings reflected the many great activities and people in the school. The Executive Board was engaged and interested, community collaborations were strong, and fundraising was on an upward trajectory.

Mr. James Landen, Jr. provided the Athletics Campaign Steering Committee update:

- Mr. Landen said Athletics fundraising included the Weber End Zone Complex, establishing the Institute for Student-Athlete Success, and increasing annual giving to the Mustang Athletic Fund.
- The SMU Athletics Department had much success over the course of the campaign including six new athletics facilities, increased giving to the Vision 2025 Fund, and the Circle of Champions.
- In just the past 6 months, Athletics celebrated:

- The groundbreaking of the Holt Hickman Outdoor Pool at the Robson & Lindley Aquatics Center
 - The grand opening of Washburne Soccer & Track Stadium
 - The establishment of the Student-Athlete Success Department, which Athletics hoped to grow into the Institute for Student-Athlete Success
- Principal gifts supporting the Weber End Zone Complex included: \$15M from Ms. Liz and Mr. Bill Armstrong, \$5M from Mr. Marty Flanagan, and \$2M gift from Mr. William Ware.
- The SMU Mustang Club had raised just over \$194M for the *Ignited* campaign.
- Mr. Landen reminded the Committee that the following day, the groundbreaking ceremony for the Weber End Zone Complex would be held.

Mr. Cheves provided an update on SMU-in-Taos, SMU Libraries, and Student Affairs.

- Mr. Cheves said SMU-in-Taos hosted May and June Term along with the 2022 Cultural Institute, which was a tremendous success. Mr. Cheves said it was great to be back on campus, reconnecting and attending an excellent lineup of courses. As mentioned in May, there was a change in leadership at SMU-in-Taos, with Dr. Mike Adler returning to teaching full time. Mr. Cheves was pleased to announce Dr. David Lee, Assistant Vice President for Curricular Operations & Strategy, had been named the William P. Clements Executive Director for SMU-in-Taos. Over the past year, Dr. Lee focused on getting the Taos campus ready for students following Covid, and Mr. Cheves was grateful for his willingness to take on the additional role.
- Campaign priorities for SMU-In-Taos included: academic scholarships, program support, and campus renovations.
- Student Registration is currently open for Jan Term 2023 and 45 students had already registered. Following the Cultural Institute, a new endowment was established by SMU-in-Taos Board members and friends to support student scholarships. The 2023 Cultural Institute was scheduled for July 20-23, 2023; courses would be announced at a special event in February 2023 and registration would then begin. The SMU-in-Taos Board meeting was scheduled for February 2, 2023.
- SMU Libraries continued to support students and faculty, providing services enhancing the academic experience at SMU. The Fondren Library introduced the new Scholarship & Research Studio ahead of the fall semester. The Scholarship & Research Studio was a dynamic crossroads of research on the SMU campus where faculty, graduate, and undergraduate students would find the expertise, training, institutional knowledge, and computational tools to launch their complex research and creative inquiries in a collaborative, technologically advanced, and inclusive location.
 - SMU Libraries received several new collections since the last CEC meeting, including:
 - The Heritage Bible
 - Mary Hermann Film Collection
 - Sheldon Katz Photojournalism Collection
 - Hervey Priddy Presidential History Collection
 - C. Paul Rogers III Baseball Collection
 - World Golf Hall of Fame Collection
 - Special Collections continued to be a strength of the SMU Libraries, and there was focus on raising awareness of these collections through engagement opportunities and bringing people on campus to experience them.
- SMU Libraries for campaign priorities included: the Fondren Library Scholarship & Research Studio, endowing the Dean of SMU Libraries position, endowing the Special Collections Leadership/Conservation Lab, and endowing the Librarian Internship Program.

- Mr. Cheves said he was pleased to present the update for the Division of Student Affairs. Donor enthusiasm remained high for SMU's Division of Student Affairs campaign priorities. The Division of Student Affairs had seen an outpouring of support for programmatic and capital initiatives.
- Mr. Cheves reviewed Student Affairs campaign priorities:
 - General capital improvements, such as wrapping up funding for newly remodeled Hughes-Trigg Student Center. There were still some very attractive naming opportunities available such as the Varsity, which was the central gathering place for students, the Grand Ballroom and select suites.
 - Religious Life, Social Change, Intercultural Engagement Initiatives
 - Campus Experience, including initiatives encouraging students to serve by engaging with partners in underserved community via program like Engage Dallas and SMU Serves
 - Wellness programs, for which there had been an outpouring of interest from Alumni and Parents.
 - Spirit Programs like band, cheer, and Peruna were an important part of the universities brand and student experience. Student Affairs wanted to expand those offerings to better meet the needs of SMU.
- The Division of Student Affairs received some notable gifts throughout the year:
 - A generous gift commitment to the Student Emergency Fund to support students impacted by unforeseen financial hardship
 - Operational support commitments to the Polo Club
 - A Planned Gift commitment to Center for Faith and Learning
 - A Major Gift commitment enhancing Spirit Programs at SMU by funding and additional position
 - A \$250K gift commitment creating the largest endowment supporting SMU Spirit and honoring SMU Super Fan Mr. Paul Layne.
- Mr. Cheves reviewed upcoming Student Affairs events:
 - #1Day4Dallas (Fall Day of Service) - October 29
 - The Great Crumpkin - October 30
 - Celebration of Lights - November 28
 - Crain Endowment Board meeting
 - Hegi Advisory Board Meeting
 - IFC and Panhellenic Greek Recruitment - January 9 – 14
 - IFC Recruitment - January 11 – 14
 - SMU Serves - January 21, 2023

Mr. Cheves reviewed upcoming campaign events, highlighting the following:

- The Weber End Zone Complex groundbreaking
- Several national campaign meetings and events
- The celebration of the Brookshire gift in Tyler
- Giving Day

Mr. Ford gave the floor to Mr. David Miller to provide campaign results.

- Mr. Miller thanked the Committee for their generosity and service. Mr. Miller said even only being 15 months into the *SMU Ignited* campaign, the University was on a trajectory to break all previous campaign records in terms of the increasing sizes of gifts, the numbers of new donors, extraordinary growth in giving by non-alumni as well as parents, and total participation by alumni.
- Mr. Miller announced the campaign total: \$938,963,620, or 63% of the entire goal
- Mr. Miller brought the Committee's attention to a chart showing the campaign's progress to date compared to the overall goal. Progress continued to be above the goal line.

Mr. Ford gave the floor to Dr. Turner for final remarks.

- Dr. Turner said the campaign was generating excitement among the entire SMU family. There were already over 52,000 donors at the current stage of the campaign, compared with 65,000 in the entire last campaign. SMU was pleased with attendance at regional events, and there had been results of the strategy to add more major gift and principal gift fundraising to the staff. Dr. Turner said Mr. Cheves and the DEA team were engaging more faculty in the campaign, and the school and unit officers were doing a terrific job supporting the Committee and their efforts.

A video was shown to the Committee, originally presented at a reception for major donors to the campaign.

With no further business, the meeting was adjourned.

**Meeting of the Campaign Executive Committee
May 4, 2023, 10:30am, Mack Grand Ballroom**

MEETING MINUTES

At 10:30 am, Mr. David Miller called the meeting to order.

- Mr. Miller welcomed the Committee members to the eighth meeting of the Campaign Executive Committee, the third since the launch of the *Ignited* campaign.
- Mr. Miller stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, seated to his left and right, along with the co-chairs of the Campaign Steering Committees, seated around the open table. A complete committee roster was provided in Attachment A of the materials, and minutes of the December, 2022 meeting were provided in Attachment B.
- Mr. Miller noted the members present: the President's Executive Council, academic deans, the Director of Athletics, the staff leadership of Development and External Affairs, and the Directors of Development supporting the Campaign Steering Committees.

Mr. Miller gave the floor to Dr. Turner for the President's report.

- Dr. Turner introduced the new Mary and Richard Templeton Dean of the Lyle School of Engineering, Nader Jalili. Dr. Turner said Dean Jalili joined SMU from the University of Alabama where he was head of the Mechanical Engineering program. Dean Jalili hit the ground running, meeting with students, faculty, staff and supporters as he learns more about the school and SMU, and sets the direction for the school's future.
- Dr. Turner reviewed several additional Principal Gift commitments announced at the February Board of Trustees meeting:

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| Anonymous (Clark Foundation) | Cox School Renovation and Expansion Fund |
| Anita Ray Arnold and Truman Arnold | Meadows School Visual Arts Facilities Renovation |

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| The Jeanne R. Johnson Foundation | The Jeanne Johnson Women in Business Scholarship Fund The Jeanne R. Johnson Meadows Scholars Endowment Fund |
| Jack D. Knox '60, '63 | To Be Designated |
| Cary M. Maguire Foundation | Cox School Renovation and Expansion Fund Maguire Energy Institute Endowed Program Fund |
| Carl Sewell '66 and Peggy Higgins Sewell '72 | Sewell BBA Scholars |

- Dr. Turner announced new Principal Gift commitments received over the spring:

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| Mary Frances McClure Burleson '57, '97 † | General University |
| Clements Foundation | Clements Hall - Scholars' Den Renovation |
| Robert Gotovac, Jr. '86 | Garry Weber End Zone Complex |
| J. Stephen Lockton '89 and Samantha A. Lockton and Stephen Lockton Family Foundation | Garry Weber End Zone Complex |
| Sarah Fullinwider Perot '83 and Ross Perot, Jr. and The Sarah and Ross Perot, Jr. Foundation | The Thomas W. Luce, III Centennial Dedman Law Scholars Program Fund |
| Phillips Foundation | Creative and Social Impact Lab SMU Cox Real Estate Impact Fund |
| Richard Ware '68 | Garry Weber End Zone Complex |
| Leland B. White '72 and Monica Hillenbrand White '87 | Opportunity SMU Endowment Fund The Leland White Family Endowed Engineering Scholarship Fund |

- Dr. Turner said a special event was held after the February Board meeting announcing a \$20M commitment from Mary and Richard Templeton to the Lyle School.
- The commitment, alongside other earlier campaign gifts to Lyle made by the Templetons, created the Mary and Richard Templeton Engineering Excellence Program which would support engineering students and research initiatives. \$5M of their commitment endowed the Mary and Richard Templeton Dean position. Dr. Turner thanked the Templetons for their generosity.

- Dr. Turner announced Ms. Marlyne Sexton committed \$15M to the Meadows School, establishing the G. Marlyne Sexton Institute for Musical Theatre and the G. Marlyne Sexton Institute Director. Dr. Turner stated it was an important addition to the School's offerings and built on the strong programs and faculty already in place in theatre, music and dance. Programs in those fields were popular and having the new resources in place, which included both endowment and operational startup funds, would quickly position Meadows' Musical Theatre offerings as a competitive program.
- Dr. Turner announced a significant gift from Ms. Jan and Mr. Trevor Rees-Jones, comprised of several components. One component was a significant portion of the sizeable Rees-Jones collection of items related to the American West – including books, documents, folios, and photographs numbering in the thousands of items. The collection aligned closely to the American West holdings in DeGolyer Library, and, considered together, created an important and national-level resource for students, faculty and visiting scholars. Dr. Turner said the Rees-Jones collection would be a very valuable resources for SMU programs like the Clements Center for Southwest Studies and SMU-in-Taos, among others.
- In addition, the Rees-Joneses were committing significant financial resources, including \$25M for the creation of the Rees-Jones Library of the American West which will house the collection as well as elements from DeGolyer, and a \$5M endowment to support the library. Dr. Turner said it was a unique investment in SMU Libraries and a tremendous boost to SMU's offerings and research activities in the humanities and other areas.

Mr. Cheves introduced the Committee to Mr. Joshua Whittenburg, the new Associate Athletic Director for Development. Mr. Cheves also introduced visiting campaign consultant Mr. Bob Sweeney.

Mr. Marty Flanagan provided the National Steering Committee update:

- Mr. Flanagan said at the conclusion of first year of the public phase of *SMU Ignited*, there were significant results in markets across the US. Dallas, Houston, and the State of Texas as a whole, currently accounting for over 80% of our fundraising production to date. The early results were in alignment with the gift production shown during the *Unbridled* campaign.
- Mr. Flanagan highlighted growth in new areas: New York/Connecticut, Denver, Nashville, Washington D.C., Atlanta, and both Western and South Florida all produced over \$8M in campaign support to date for SMU. Those regions had predominately been centers for economic development during the last 5-10 years and SMU's alumni, parents and friends are showing strength in their support of the Hilltop. Regions such as both Southern and Northern California continued to have strong donor participation rates, and their campaign dollar totals were expected to increase.
- Mr. Flanagan reviewed some recent gifts in FY23:
 - \$300K from SMU parent Dr. Dean Rider of San Francisco, CA towards Dedman College Research Funds
 - \$500K from Mr. Chuck Schumacher of Palm Beach, FL towards the Cox Capital Renovation Project
 - \$250K from Mr. Dick Weekley of Houston, TX towards the Bridwell Institute at Cox
 - \$1M from Ms. Susan and Mr. Bert Getz of Chicago, IL towards the Cox Capital Renovation Project
 - \$250K from Ms. Louise and Mr. Tom Gresham of Indianola, MS for Cox MBA Fellowships
 - \$250K from SMU Parent Mr. Alan Dabbieri of Washington, D.C. for the President's Discretionary Fund
- Mr. Flanagan stated Mr. Mark Dini had been working tirelessly, in partnership with SMU trustees and academic leaders, to help gather donors and friends throughout the Houston area. The Cox School of Business and Dedman College of Law hosted alumni events and intimate dinners in Houston in the last few months, and SMU Football Coach Rhett Lashlee would attend events in early May. Mr. Flanagan was

certain the important ground work and influx of activity would pay dividends in of student recruitment, stewardship and philanthropy.

- Mr. Flanagan said there were multiple upcoming events as the national rollout of the campaign continued, notably in New York City, Palm Beach, and the Phoenix area. Mr. Flanagan encouraged the Committee to inform him or Mr. Blake Davis of key leaders who would be ideal members of the National Campaign Committee.

Mr. Bill Vanderstraaten provided the Cox School of Business Campaign Steering Committee update:

- Mr. Vanderstraaten was pleased to provide an update on progress towards meeting the goal of \$140M for the Cox renovation and expansion project. To date, \$114.9M had been raised, which was \$25.1M away from the goal.
- Images of the Cox construction progress since the groundbreaking were shown.
- Mr. Vanderstraaten said there were many naming opportunities available, and showed a slide of opportunities at \$1M and above. Examples on the slide included suites, wings, classrooms, among others.
- Mr. Vanderstraaten reported on the Cox School's success in the year's rankings, which came out just a few weeks prior. *U.S. News and World Report* ranked Cox's Full-Time MBA program at #33, which was a significant improvement from the previous year, where it ranked #41. Cox's BBA program was ranked #23 by *Poets and Quants for Undergrads*, which is also a huge accomplishment.
- On May 12th, Cox would honor five alumni at its Alumni Awards luncheon.
- Mr. Vanderstraaten said he was honored to be a recipient of the award and would be joined alongside:
 - o Mark C. Griege, BBA '81, the Managing Director of RGT Wealth Managers.
 - o C. Malcom Holland III, BBA '82, Chairman & CEO of Vertix Bank Holdings, Inc.
- The young alumni awardees were:
 - o Christina B. Goodman, BBA '06, the Vice President for Development at Baylor Scott & White-Dallas Foundation
 - o Indira P. Sanka, MBA '16, CEO of FSGS Graphis
- Mr. Vanderstraaten shared information about a program he was a part of and was very passionate about, the SMU Real Estate Impact Fund. The Fund is a \$10M donor-contributed, discretionary, student-managed, open-ended "evergreen" investment fund targeting passive LP investments in a variety of real estate projects with a demonstrable social impact. Fund investments were selected based on both financial and non-financial, social metrics. The fund gives students hands-on practical experience while also allowing funds to be invested in student scholarships, making it a meaningful and impactful program.

Mr. Jon Altschuler provided the Dedman College Campaign Steering Committee update:

- Mr. Altschuler said Dedman College had enjoyed a transformational season in the *SMU Ignited* campaign. The engagement level of the College's constituency had increased in all levels pertaining to time, aptitude and giving. The fall semester ushered in a new era for the College with the inauguration of the Elisabeth Armstrong Dean after the fall Board meeting, which was heavily attended. In addition, the Executive Board was celebrating their highest percentages of meeting attendance and giving than ever before.
- As Dedman College continued to support faculty in SMU's journey to becoming an R1 institution, the College would focus on endowing both graduate student scholarships and the Dean's Research Council – which remains the most efficient mechanism of supporting research seed funding. Dedman College would also be focused on increasing its student services with new scholarships for undergraduate students as well as growing its mentorship program, which kicked off in the spring semester.

- Through an application process provided to all majors in Dedman College, 86 students were paired with mentors this academic year. Rather than focusing solely on professional experience with student aspirations, Dean DiPiero and his staff paired these mentors with students who were seeking life skills in which the mentors could easily instruct, guide, and implement their aptitude into the student. Initial contact was student led, and the College is proud of how the program benefited both mentees and mentors.
- Mr. Altschuler thanked Mr. Carl Sewell for supporting the Dedman College Scholars program since its inauguration. In 2009, the program held 3 scholars and currently boasted 67. Mr. Sewell's investments of nearly \$3M into the program was a powerful testament to his commitment for SMU and the impact he had made on many students. Mr. Altschuler said Dedman College was fortunate to partner with Mr. Sewell in service of the University.
- Mr. Altschuler said initiatives like the Human Rights Program and the Dedman College Scholars Program would remain the top focus in advocating for financial aid in supporting undergraduate students.

Ms. Amy Ware provided the Dedman School of Law Campaign Steering Committee update:

- Ms. Ware said the Law School was excited to be completing its first year with Mr. Jason Nance as the dean of the Law School. Since his arrival in August of last year, Dean Nance had addressed the needs of the School both internally and externally. In March, Dean Nance met with over 100 constituents, which was a great sign of his approach and passion as well as his innate skills as a leader in the legal community. Ms. Ware said with the addition of Mr. Clayton Ellis as the development officer, they had crafted a new narrative in three parts to promote the school, using October 2025 as the culminating point to celebrate the Dedman School of Law's centennial anniversary.
- The first was creating access to education. The burden of student debt hinders prospective students from going to law school. By investing in new endowments and operational funds, the Law School would pave a path for students to come to SMU, and invite some of the nation's most talented faculty to create new knowledge resulting in benefits to the legal community for future practitioners.
- Second, is the School's commitment to experiential learning by investing in its clinics, externship, and simulation programs. The skills gained in each of these areas will become Dedman Law students' first hands-on experiences in the legal profession. Investments in this area will improve the School's output through increased staff, upgraded technological resources and infrastructure, as well as added incentives for students to produce top-tier results.
- Lastly, the Dedman School of Law was ushering in a new era of instruction with a world class facility, recruiting outstanding students and retaining the School's prestigious faculty. The logistics and instructional requirements for a law school had changed since SMU's facilities were originally completed. A feasibility study on the law quad would begin in the near future, which would better inform on how to prioritize and execute a robust renovation to all of the Law School's existing facilities making SMU a top-destination.
- Over the last year, there was a palpable spark of excitement resulting in a clear vision for the School. Ms. Ware said Dedman Law was in a critical period for instruction, outreach, and success and looked forward to partnering with the Committee in promoting this message.

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- Dr. Lyle reviewed some of the largest gifts to the Lyle School since the December 2022 CEC meeting:
 - Ms. Mary and Mr. Richard Templeton committed \$20M: \$15M to support engineering education and research through initiatives including postdoctoral fellowships and scholarships for women, and \$5M to endow and name the school's dean position.

- Mr. Leland White committed \$300K to The Leland White Endowed Engineering Scholarship Fund
 - Ms. Angela Meyer committed \$150K to the SMU fund for Lyle.
- Mr. Nader Jalili started as the inaugural Mary and Richard Templeton Dean on March 1. Dean Jalili joined SMU from the University of Alabama, where he was Professor and Head in Mechanical Engineering since 2018. Dean Jalili is an innovative leader and researcher known for bringing engineering education and research resources to undergraduate and graduate students, industry partners and community outreach programs.
- Through a partnership with IBM valued at \$1.4M, the Darwin Deason Institute of Cyber Security was launching a new Cyber Autonomy Range. The range would provide software and consulting for Executive Director Mitch Thornton and his team to test the vulnerability of autonomous systems against cyber-attacks.
- The Lyle School began a new graduate learning format named Lyle Anywhere, which provided online, distance, and hybrid learning for all Lyle students. Lyle-Flex classrooms include cutting-edge technology which creates a seamless environment between in-person and remote students.
- Dr. Lyle highlighted some notable upcoming events:
 - Over the next 12-18 months, Dean Jalili and Director of Development Maya Jhangiani will travel across the country to meet alumni and potential partners
 - The inaugural Lyle Alumni Board would launch in the fall
 - The Hunt Institute's 10th anniversary celebration will be held in the fall

Ms. Jennifer Altabef provided the Meadows School of the Arts Campaign Steering Committee update:

- Ms. Altabef was pleased to announce the Phillips Foundation was funding a three-year social impact investment lab, housed at Meadows in the Corporate Communications and Public Affairs department. Ms. Altabef said impact investing had entered the mainstream over the last decade and could be summarized as 'venture capital for social good.' It was a popular way to combine altruism with investment. The impact investment lab would partner closely with faculty at the Cox School and potentially others as it evolves.
- Ms. Altabef stated the Meadows School was grateful to Anita and Truman Arnold for a \$1M gift to close out fundraising for the \$34M renovations to the visual arts facilities. The Arnolds named a trio of studios for print and photography. Ms. Anita Arnold was also a new member of the Meadows Board.
- The Jeanne R. Johnson Foundation made an endowment gift of \$800K to support the piano department and students. Ms. Altabef said Ms. Johnson was a champion of music at the Meadows School, and was grateful for the investment in the department.
- Following an international search, Mr. Sergei Babayan will succeed Mr. Joaquin Achucarro as the Joel Estes Tate Professor of Piano. Mr. Babayan had an international reputation as one of the world's great pianists. In addition to being known for his performances, Mr. Babayan held the record for having five of his students qualify for the live rounds of the Van Cliburn Piano Competition in the same year. Mr. Babayan taught at the Juilliard School and Cleveland Institute of Music, but planned to leave Cleveland for Dallas, and will keep one student at Juilliard. The gift from the Johnson Foundation enabled Meadows to make a competitive offer to bring Mr. Babayan to Meadows.
- SMU was pleased to host the students and many performances of the Van Cliburn International Junior Piano Competition in June. The competitors range in age from 13 - 17 years old and had exceptional talent. Ms. Altabef encouraged members of the Committee to come to Caruth Hall for one or more rounds of the Competition.
- Ms. Altabef said Meadows was launching a new virtual graduate program launching in the fall, combining creative design with emerging digital technologies. This course was one of the many ways Meadows was distinguishing itself among other arts schools.

- The CSC was taking a deep dive into thirteen different disciplines and divisions at Meadows to determine the areas of greatest potential and how to achieve maximum impact – because the needs of the music department were very different than art, journalism, or the Meadows Museum. We were inspired by a concept introduced by Mr. Carl Sewell in a previous campaign – a simple card containing a quick outline for a case for need and offer funding opportunities at the highest level. These cards were introduced at the most recent Meadows CSC and Executive Board meetings and had already prompted discussions among potential donors.

Mr. Joe Hardt provided the Perkins School of Theology Campaign Steering Committee update:

- Mr. Hardt reviewed major gifts received for Perkins since the December 2022 CEC meeting:
 - \$404.8K from the General Board of Higher Education and Ministry
 - \$200K to endow Perkins Scholars from Dodee Frost Crockett
 - \$142K in sponsorships for Public Life Personal Faith Scholarship Luncheon
- The Perkins School’s top priorities were scholarship aid, and Bishop McKee visiting with donors, churches, and friends.
- Mr. Hardt reviewed recent Perkins School achievements:
 - Mr. Hardt said Bishop McKee was off to a great start as Perkins’ dean ad interim.
 - The Baptist House of Studies was dedicated in the spring semester.
 - Mr. Hardt highlighted activities from the spring semester:
 - The annual Bolin Family Public Life, Personal Faith scholarship luncheon was held on March 28 and was a success.
 - The 3rd annual Faith and Business Luncheon was held on April 10th and featured Mr. Grant Moise.
 - On April 18 – 20, Bridwell Library hosted the Codex Sassoon, the oldest complete Old Testament manuscript in existence. The Bridwell Library was one of only 5 locations in the country where the bible was shown, and SMU was the only university among those 5 places. 3,500 people visited the exhibit, which also included activities around Perkins through the three-day event.
- Mr. Hardt highlighted some upcoming events
 - The final installation of the Caren and Vin Prothro organ will be completed by late fall 2023. The Lessons and Carols from Christmas service would feature the organ.
 - The Perkins School will host the fall Faith and Business luncheon in September, featuring Mr. David McAtee, Senior Executive Vice President and General Counsel for AT&T.

Ms. Connie O’Neill provided the Simmons School of Education Campaign Steering Committee update:

- Ms. O’Neill said top priorities for the Simmons School were 25x25 Teacher Scholarships; the West Dallas STEM School, focusing on the Learning Garden, operational support, and teacher scholarships; and the TEIL Cluster, focusing on operational support and endowment funding.
- Ms. O’Neill reviewed notable new projects in the Simmons School:
 - Dr. Eric Bing, professor of global health in the Department of Applied Physiology and Sport Management Department, was leading a partnership with the University of Alabama, “The AI/VR Community-Police Initiative” to develop an innovative and adaptive learning technology that can be used by police organizations in partnership with the communities to more effectively de-escalate encounters with select community populations, such as those with mental illness or developmental difficulties.
 - The Center on Research and Evaluation was launching its expanded Early Learning Information System 2.0 in coordination with local organizations Big Thought and Dallas AfterSchool. The tool is designed to assist out-of-school time service providers with data collection, analysis and decision making for the students in their programs.

- Simmons faculty participated in 9 presentations at the National Council on Measurement in Education Conference and 25 presentations at the American Educational Research Association Annual Meeting this year. Departments represented included: Education Policy and Learning, College Access, CORE, Teaching and Learning, and Research in Math Education.
- The Simmons School jumped to the Top 50 in national rankings of Best Graduate Schools in the United States. U.S. News & World Report now ranks Simmons at 49 out of the 272 universities that participate in its annual rankings report. This ranking moves Simmons to number 11 among the top private universities in the country, first among private colleges in Texas, and third among all private and public universities in the state. This was a dramatic rise, as the School was nationally ranked at 105 in 2019.
- Ms. O’Neil highlighted spring 2023 events, including the spring Executive Board meeting held at the West Dallas STEM School, the American Educational Research Alumni Reception in Chicago, and the Simmons Spring Award Ceremony Reception
- In March, SMU partnered with Toyota and Dallas ISD to conduct a site visit/tour of the West Dallas STEM School involving the North American Executive Committee from Toyota North America. In attendance were Toyota NA President and CEO Tetsuo “Ted” Ogawa, Dallas ISD Superintendent Stephanie Elizalde, and President Turner. Ms. O’Neill said the tour was a great success, demonstrating the hard work of all partners including local community groups and the impact the STEM School has for the children of West Dallas.

Mr. Bill Armstrong provided the Athletics Campaign Steering Committee update:

- Mr. Armstrong reviewed some of the largest gifts received since the December 2022 CEC meeting, all for the Garry Weber End Zone Complex:
 - Mr. William James Ware ’01 \$2M
 - Mr. Robert Gotovac, Jr. ’86 \$1M
 - Mr. J. Stephen Lockton ’89 \$1M
 - Mr. Richard Ware ’68 \$3M
- Top priorities for Athletics were:
 - Continued funding for Weber End Zone Complex (\$78M of \$100M goal as of 4/18/23)
 - Exploratory phase for Institute of Student-Athlete Success (\$10M goal)
 - Increasing unrestricted gifts to the Mustang Athletic Fund and seat premium funds
- In FY23, Athletics secured \$42M in cash gifts and pledges for FY23, which was the second-best fiscal year in Athletics history. SMU Giving Day saw a record \$2.4M in gifts to Athletics and five sports/areas met or exceeded their Giving Day fundraising goals. Mr. Armstrong said donors’ generosity has resulted in competitive success, with Equestrian capturing a national title, and women’s golf, women’s tennis and men’s tennis each winning an AAC conference championship
- Head Football Coach Rhett Lashlee would embark on a “Tour of Texas,” travelling to Frisco, Houston, Tyler and Austin through April and May. SMU Football will begin its second season under Coach Lashlee on September 2nd vs La Tech at Ford Stadium
- Mr. Armstrong said there would be continued progress and updates on the construction of the Garry Weber End Zone Complex, including opportunities for site visits, as the structure takes shape. Same can be said for the Holt Hickman Outdoor Pool at the Robson & Lindley Aquatics Center. SMU Athletics has begun a feasibility study on enhancements to the Styslinger/Altec SMU Tennis Complex. Through increased efforts in ticket sales and digital marketing, Athletics Development is increasing its annual fund which provides unrestricted dollars to the Athletics Department
- Loyal Mustang Darleene White DeLee passed away on October 27, 2020. Ms. DeLee was a 1953 graduate of SMU and the first female to lead the SMU Mustang Club’s annual fund drive. Ms. DeLee was a proud football and men’s basketball season ticket holder and came in person to the Mustang Club offices each year to renew

her tickets and annual donation. On December 19th, 2022 the Estate of Darleene White DeLee gifted SMU with a \$320k donation to the Mustang Athletic Fund, the second-largest gift ever made to that designation. This donation was a testament to the connection that SMU sports programs can create for alumni.

- The Life After Ball (LAB) program was a 100% privately-funded professional mentorship program for student-athletes. The program continued to impact young men and women with career preparedness and internship opportunities. For the first time, a graduate of the LAB program (former football student-athlete Mikial Onu) was employing a current program participant, current men's basketball student-athlete Darius McBride. The LAB program has become "generational," with past participants investing back into the program after experiencing positive outcomes for themselves.

Mr. Cheves provided an update on SMU-in-Taos, SMU Libraries, and Student Affairs.

- In the area of SMU libraries, you heard earlier today about the tremendous gift from Mr. and Mrs. Rees-Jones which is emblematic of the many types of collections housed in our libraries which benefit the entire academy as well as the community and scholars from around the world.
- Recent gifts to the DeGoyler Library included:
 - Carl Fowler Collection of Railroad Menus
 - Sims McCutchan Collection of Cookbooks (dating from 1877-2003)
 - Nancy Wood photography collection
 - Jerry Haynes Archives, also known as Mr. Peppermint
- Campaign Priorities for the library are:
 - Endowment for Special Collections Leadership/Conservation Lab
 - Endowment for Librarian Internship Program – SMU hosts 5 interns from surrounding Library Science Programs to work with us each year.
- SMU-in-Taos had 60 students at its January term and it will return to in-person at the upcoming cultural institute. Campaign priorities for SMU-In-Taos included scholarships, program support, and campus renovations.
- General University continued to focus on raising awareness and scholarship support for Opportunity SMU. The renovation of the Scholars' Den in the basement of Clements Hall was ongoing with fundraising activities focused on engaging alumni and students in giving opportunities. Mr. Cheves was pleased to announce a \$1M commitment from the Clements Foundation in support of this renovation project.
- Recent gifts to General University Programs included:
 - \$200K to support Study Abroad programs
 - \$250K Grant from the Richter Memorial Fund to support Richter Fellows Program
- The Richter Fellowship program was funded by the Paul K. and Evalyn E. Book Richter Memorial Funds and is awarded to members of the SMU University Honors Program to conduct independent research, both outside or inside the United States.
- In the area of Student Affairs, there was an increased commitment to growing the spirit program at SMU. Student, parents, donors and administration had been impressed with the vision of the new Director of Spirit Programs, Mr. Charles Aguillion, and the results have been fantastic.
- Mr. Cheves said Bill and Liz Armstrong, seeing a need for an increased investment in spirit programs and, in an effort to encourage others to engage, generously made a gift underwriting programmatic and staff support.
- There was growing donor interest is growing in Spirit Programs:
 - A \$250K gift funded the largest endowment for Spirit Programs to honor the life of SMU super fan Mr. Paul Layne.

- \$225K in major gift commitments were received toward Mustang Band, Spirit and support of Peruna.
- Mental health and wellness were an increasing priority at SMU. As a direct result of this interest several gifts have been secured:
 - Three gift commitments totaling \$250K from parents to increase operational support for Mental Health and Wellness
 - Continued growth of the SMU Wellness and Recovery endowment, started by an SMU alumni who saw a need while he was a student and addressed it after graduating by giving back and encouraging others to support the initiative.
- Student Affairs was proud of its faculty, staff, students and champions for the work they did to make Giving Day so successful. Giving Day for Student Affairs was \$392K, which was raised from over 2,141 gifts. This was more than double the previous year and about a 30% increase from 2021.
- Mr. Cheves said he wanted to provide a quick update on the overall results of SMU's Giving Day held on March 7, which was tremendously successful. Gifts were received from over 4 thousand donors, totaling over \$5.2M. Mr. Cheves thanked the Committee and all volunteers and donors who made Giving Day a success.
- Activities like Giving Day as well as efforts to solicit other campaign gifts to endowments and facilities had resulted in significant gift revenue for the current fiscal year. Mr. Cheves reported operational gift revenue as of March 31 totaled \$52M, which was over the yearly target of \$50M; and total gift revenue, including capital and endowments, exceeded \$125M, which was over the yearly \$100M revenue target.

Mr. Cheves reviewed upcoming campaign events, highlighting the following:

- The Frances Anne Moody Hall groundbreaking on September 15, 2023
- The Holt Hickman Pool dedication in the fall
- The David B. Miller Quadrangle dedication in May 2024
- The Garry Weber End Zone Complex dedication at the first 2024 home game

Mr. Miller gave the floor to Dr. Turner to provide campaign results.

- Dr. Turner announced the campaign total: \$1,054,185,423 which was 70% of the entire fundraising goal.
- Dr. Turner said the distribution was roughly equivalent between capital, endowment, and operations. Dr. Turner brought the Committee's attention to a chart showing the campaign's progress to date compared to the overall goal. Progress continued to be above the goal line.

With no further business, the meeting was adjourned.

**Meeting of the Campaign Executive Committee
December 7, 2023, 10:15am, Mack Grand Ballroom**

MEETING MINUTES

At 10:15 am, Mr. David Miller called the meeting to order.

- Mr. Miller welcomed the Committee members to the ninth meeting of the Campaign Executive Committee, the fourth since the launch of the *Ignited* campaign.
- Mr. Miller stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, seated to his left and right, along with the co-chairs of the Campaign Steering Committees, seated around the open table. A complete committee roster was provided in Attachment A of the materials, and minutes of the May 2023 meeting were provided in Attachment B.

- Mr. Miller noted the others present: the President’s Executive Council, academic deans, the staff leadership of Development and External Affairs, and the Directors of Development supporting the Campaign Steering Committees. Mr. Miller also welcomed campaign consultant Mr. Bob Sweeney.

Mr. Miller gave the floor to Dr. Turner for the President’s report.

- Dr. Turner said there had been a number of announcements and events since the last CEC meeting in May, most notably of SMU moving to the ACC in July 2024. The ACC announcement caused tremendous excitement among SMU alumni, fans and the campus community and garnered tremendously positive national press. Dr. Turner said the Committee would hear more about the impact of the ACC on the *Ignited* campaign during the meeting.
- The announcement of a \$30M gift from Jan and Trevor Rees-Jones occurred following the May 2023 Trustee meeting, and not only the financial gift was celebrated, but also Mr. and Mrs. Rees-Jones’ intent to gift to SMU a significant portion of the Rees-Jones collection of rare documents, books, maps and other items related to the American West. The facility design process had been started for the Rees-Jones Library of the American West on University Boulevard, just south of the Dedman Life Sciences Building.
- Dr. Turner informed the Committee he announced, at the annual faculty meeting on August 23rd, the O’Donnell Foundation’s new commitment of \$30M to two initiatives at SMU: \$15M to establish The O’Donnell Data Science and Research Computing Institute and \$15M to establish the Initiative for Digital Innovation in Engineering and Computer Science in the Lyle School. This gift included 10 endowed academic positions, scholarships, and research funds. It was a tremendous boost to SMU’s R1 efforts.
- Dr. Turner reviewed several additional Principal Gift commitments, announced at the September Board of Trustees meeting:

| Donor | Purpose |
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| Anonymous | Simmons School Applied Physiology and Sport Management Program |
| Anonymous | General University and Dedman College Scholarships |
| Kimberly Knollin Carter '81 and Thomas E. Carter '80 | The Thomas and Kimberly Carter Family Endowed Scholarship Fund |
| Linda Gladden | The Linda Gladden Endowed Scholarship Fund |
| Cindy L. Havens and G. Paul Havens | The Sterling R. E. Havens Professorship of Creative Writing Fiction Sterling R.E. Havens Fund for the Writing and Reasoning Program |
| Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 | SMU Fund for Simmons Education and Human Development The Nancy Ann and Ray L. Hunt Leadership Scholars Program (for Assoc. Dir. Position) |
| Estate of Raymond L. Norbury, Jr. | SMU Fund for Lyle Engineering |

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| O'Donnell Foundation (previously mentioned above) | O'Donnell Data Science and Research Computing Institute Initiative for Digital Innovation in Engineering and Computer Science, Lyle School |
| A. Wellford Tabor and Ann V. Tabor (gifts in honor of Tucker Bridwell) | Bridwell Institute for Economic Freedom Cox School Renovation and Expansion Fund Mustang Athletic Fund |
| Antonio Villeda '82 and Maria F. Villeda | SMU Fund for Dedman Law |
| Robert A. Wilson '67 and Susan Cooper Wilson '67 and The Robert A. and Susan C. Wilson Foundation | Cox School Renovation and Expansion Fund |

- Also at the September Board meeting it was announced \$100M had been pledged in units of \$5M to support the transition to the ACC. This group of donors was named the First Week Society, to reflect this was the first week of SMU's ACC Competitiveness Campaign.
- Dr. Turner brought the Committee's attention to a slide listing donors who committed one or more \$5M units through personal funds or funds raised. Dr. Turner was pleased to announce five donors committed two units:
 - Liz and Bill Armstrong
 - Nancy Ann and Ray Hunt
 - Carolyn and David Miller
 - Jack Knox, and
 - Mary and Rich Templeton
- The announcement of the \$100M fund received tremendous coverage and praise from the SMU campus, alumni, and the conference itself, and it motivated other donors.
- Immediately following the September 2023 Board meeting a dedication ceremony was held for the new Francis Anne Moody Hall – Dean Robin Poston has reported graduate students had already adopted the facility as their own and were studying there all hours, since there were plenty of open areas to gather, as well as a popular coffee shop.
- Dr. Turner announced new Principal Gift commitments received over the fall:

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| Anonymous | ACC Competitiveness Campaign |
| Randi Scheel Barnes '76 and Shepard E. Barnes '76 * | Athletics Endowed Program Support Cox School of Business Endowed Scholarship Support |
| Joseph G. Beard, Sr. '83 and Sherry H. Beard | Garry Weber End Zone Complex |
| Justin B. Cox '08 and Molly Macatee Cox '08 | Cox School Renovation and Expansion Fund |
| Pedie O. Bramblett Danis '95 | The George and Pedie Bramblett Endowed Faculty Research Fund |

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| Nancy McMillan Dedman '50 | ACC Competitiveness Campaign |
| Rachael Redeker Dedman '96 and Robert H. Dedman, Jr. '80, '84 | ACC Competitiveness Campaign |
| Clark K. Hunt '87 and Tavia S. Hunt | ACC Competitiveness Campaign |
| Warren G. Lichtenstein | ACC Competitiveness Campaign Cox School Renovation and Expansion Fund |
| Steven J. Lindley '74 and Shelli Mims Lindley | ACC Competitiveness Campaign |
| Barbara Lovingfoss Mayfield '86 * | SMU Fund for Meadows |
| Bruce A. Robson '74 and Emily K. Robson | ACC Competitiveness Campaign |
| Allison Wortley and Michael J. Wortley '98 * | ACC Competitiveness Campaign Mustang Excellence Fund for SMU Football |

- Dr. Turner said a special event was held after the February 2023 Board meeting announcing a \$20M commitment from Mary and Richard Templeton to the Lyle School.

Ms. Jeanne Phillips provided the National Steering Committee update:

- Ms. Phillips said Dallas, Houston, and the state of Texas, accounted for over 85% of fundraising production to date. Indianapolis, New York, Kansas City, Denver, and Nashville had all produced outstanding results in campaign support for SMU. Regions such as Florida, DC, and both Southern and Northern California continued to have strong donor participation rates.
- Ms. Phillips reviewed some recent gifts in FY23:
 - \$1M from SMU parents Mike and Andre Koester, out of NYC, towards the Sport Management Program
 - \$500K from Mike and Allison Wortley, out of Houston, towards the ACC Competitiveness Campaign
 - \$200K from SMU parent Dr. Dean Rider of San Francisco, CA towards Dedman College Research Funds
 - \$100K from Greg and Sandy Danz, out of Newport Beach, towards the ACC Competitiveness Campaign
 - \$1M from SMU parents Larry and Jen Fox, out of Sarasota, FL, towards the Weber End Zone Complex.
- Ms. Phillips said an outstanding stewardship event for Houston donors was held earlier in the fall, along with a later dinner where Mr. Rick Hart joined 50 top Mustangs to discuss SMU's move to the ACC. A campaign event was held in New York City at the Racquet and Tennis club which resulted in many new annual and major gifts.
- Ms. Phillips was certain the important groundwork and influx of activity would pay dividends in terms of student recruitment, stewardship, and philanthropy. The national rollout for the *Ignited* campaign continued to unfold and there were multiple upcoming events in the works, including in the Palm Beach area in spring of 2024. Ms. Phillips said all the National Committee looked forward to the continued success of *SMU Ignited*.

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- Mr. Bridwell said the Cox School was grateful for the support received as funds continued to be raised for the building, renovation, and expansion of Cox facilities. \$120.6M had been raised toward the \$140M goal and there were still many key naming opportunities available at various levels.
- The MBA scholarship drive had raised \$22M towards the \$30M campaign goal. Mr. Bridwell said scholarships were crucial to Cox, as they attracted and retained high-quality MBA-level students.
- Since the last meeting, two important rankings were published, with SMU Cox ranking extraordinarily well. *Bloomberg Business Week's* rankings ranked Cox's full-time MBA program at number 27, which was 13 spots higher than the previous year. Additionally, *U.S. News & World Report* ranked Cox's full-time MBA program at number 33, which was the highest *U.S. News* full-time MBA ranking in Cox's history.
- As part of Cox's healthcare initiative, SMU Cox hosted 200 healthcare leaders from across North Texas for a 2-day conference. This was an exciting initiative, and the School looked forward to similar events in the future.
- Cox also launched the "Leaders on Leadership" speaker series, to spotlight leadership, one of the core pillars of SMU Cox curriculum. Fall speakers included the Chief Operating Officer of the PGA, Craig Kessler; Troy Aikman, the founder of Eight Beer and Former Dallas Cowboys quarterback; and Admiral Patrick Walsh of the United States Navy. The speaker series would spotlight four more leaders in Spring 2024, including President R. Gerald Turner.
- The Cox School was excited to welcome to the Hilltop MBA and MS grads Homecoming weekend at the Cox Alumni Reunion Grand Gathering.
- Mr. Bridwell asked the Committee to save the date of May 3 to attend the dedication of the David B. Miller Business Quadrangle.

Ms. Liz Armstrong provided the Dedman College Campaign Steering Committee update:

- Ms. Armstrong said as of October, Dedman College had raised over \$45.8M for the *SMU Ignited* Campaign. There was a significant increase in the number of gifts received for both endowment and operational purposes. Several endowments had been created to support different departments and many more conversations were under way to encourage giving.
- Dedman College had three main areas of campaign priorities. First was The Fund for Faculty and Research Success, which would help the dean hire and retain the best researchers, scholars, and teachers. The fund would help in hiring top-notch faculty to elevate the level of learning at SMU and help in providing additional resources to existing faculty for their endeavors.
- The second main campaign priority was the Human Rights Program Endowment (HRP). The Human Rights Program was one of the most impactful programs at SMU. With an emphasis to fully endowing the program, a task force led by Dedman Campaign Steering Committee co-chair, Ms. Ashlee Kleinert, would focus on connecting with potential donors so the program could continue to offer life-changing experiences. The goal of HRP was to help these future students with training to lead and have meaningful conversations on society's most pressing issues.
- The third main campaign priority was the Dedman College Scholars Program, which supported merit- as well as need-based students. Starting next academic year, plans were to increase the scholarships offered through this program to \$15K per year per student versus \$10K in previous years, which would be a total of \$60K in scholarship assistance during their academic journey. This scholarship would be an important aspect in many students' decision to attend SMU, as some would not be able to attend otherwise.
- The Dedman College Scholars cohort welcomed 21 students last August. Throughout their academic journey, these students will engage in peer events, mentorship and leadership opportunities. They are truly the top-notch leaders of our future, and the goal is to recruit 25 students for the upcoming year.

- There had also been significant activities with breakthrough research contributing to SMU's Road to R1 initiative. Last year, the contributions made through the Dean's Research Council awarded eight researchers receive over \$150K in seed funding. This investment continued to pay dividends in research funding - for every dollar awarded through the program, the researchers brought back at least 11 dollars more in federal and foundation funding.
- Some researchers were also able to publish their work in the top journals in their field. Ms. Elfie Kraka, professor in Chemistry, published in the *Journal of the American Chemical Society* and Zhihao Wu published in *Nature Communications*.
- Ms. Armstrong said another notable achievement was the first ever SMU grant received by a new Assistant Professor, Annika Wylie, from the Cancer Prevention and Research Institute of Texas.

Ms. Amy Ware provided the Dedman School of Law Campaign Steering Committee update:

- Ms. Ware said there was much to celebrate both in the current year and in the coming 24 months. Dr. Turner as well as the Development Committee of the Board of Trustees acknowledged the plan to celebrate the Dedman Law School's 100th anniversary. The Steering Committee was excited about this news and would focus on optimizing the School's constituent engagement for the momentous occasion.
- 2023's incoming class was the most credentialed class in its history, with a median LSAT of 164 and GPA of 3.83. In addition, the School celebrated a 98% employment rate for the class of 2022 in Bar passage required or JD advantaged positions. Dedman Law students land jobs in some of the country's largest and most prestigious law firms, private corporations, and federal clerkship positions in the country.
- Ms. Ware was excited to report in September 2023, thanks to the approval of Dr. Turner and other key administrators, the Law School hired the architecture firm S/L/A/M to perform a feasibility study for a multi-phased renovation of the law quad. The plan was expected to be complete by April 2024. Upon completion, the University would launch an aggressive fundraising initiative focused on holistic opportunities of investment in the law school, including naming facility naming gifts, scholarships, faculty support, and curricular program enhancements.
- Dedman Law had raised over \$30M for the *SMU Ignited* campaign. A \$500K gift was recently received in support of the Deason Criminal Justice Reform Center with more on the way. Four new scholarships were created totaling over \$500K, including one from Steering Committee co-chair David Huntley. Mr. Huntley and his spouse, Tracey, created a scholarship benefiting underrepresented students in the law school, and AT&T made an additional gift to honor Mr. Huntley.
- Ms. Ware addressed three additional gifts to the law school. First, a \$1M gift was received from an anonymous donor for an existing fund supporting faculty research efforts. Second, the Ami Patel Scholarship reached its \$200K goal through cultivation of relationships with her family and friends. Ms. Patel passed away while attending Dedman Law School in 2019 due to a fatal car accident. The scholarship was initially created by Ms. Patel's parents and will benefit future law students based on need and merit in 2024. Third, over \$140K was received from law firm partners to support student organizations and law journals.
- The Law School would have several other gifts to report for at the next CEC meeting in May. Before the end of FY23, Dedman Law was working toward a multi-million-dollar commitment designed to support facilities renovations and a robust scholarship campaign which would provide matching gift opportunities. A scholarship program was being created which would enable the Law School to compete for top students applying to the best law schools in the country.

- Ms. Ware said the Law School was very grateful for the many alumni, professors, staff, and other partners who had contributed to the Law School's storied history and success. The upcoming centennial celebration would not focus only on past accomplishments but also on future achievements. The goal was for Dedman Law to become a world class law school, and a world class law school had four main components: outstanding students, faculty, curricular programs, and facilities. Ms. Ware looked forward to the Committee's partnership as a new era of Dedman Law was ushered in.

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- Dr. Lyle said the Lyle School was committed to ensuring every student emerged as a confident leader. The Lyle School offered each student a unique opportunity to cultivate essential leadership aptitudes through personalized leadership assessments, dedicated one-on-one mentorships, and immersive entrepreneurial ventures. To achieve this, the proposed Lyle Engineering Curriculum (LEC) was designed to equip Lyle's undergraduate students with both traditional credit-bearing, and non-traditional project-based learning experiences, ensuring Lyle students emerge as highly qualified graduates. The proposed structure would effectively incorporate many programs:
 - Hart Center for Engineering Leadership (HCEL)
 - Hart Institute for Technology, Innovation & Entrepreneurship (HI-TIE)
 - Deason Innovation Gym (DIG)
 - Hunt Institute for Engineering & Humanity (Hunt)
- Dr. Lyle stated the Lyle School's innovative approach using the Lyle Anywhere platform offered students the flexibility to learn in-person or remotely, in real-time or asynchronously, which catered to diverse learning styles and circumstances. The Lyle Anywhere platform would provide greater accessibility, to go beyond the classroom to broaden the reach of SMU Lyle education.
- As of October 31, 2023, Lyle's campaign total was over \$72.9M, with \$42.9M in endowed giving and \$29.9M in operational giving.
- The Lyle School had several new public phase accomplishments, including a gift from The O'Donnell Foundation. The O'Donnell Foundation was advancing SMU's digital future with a \$30M gift to endow SMU's data science institute and support engineering excellence. \$15M of the O'Donnell Foundation gift would be used for the Initiative for Digital Innovation in Engineering and Computer Science, further strengthening interdisciplinary research and teaching across engineering fields.
- Mr. Raymond Lloyd Norbury, who passed February 28th, 2023, gifted Lyle \$1M through his estate. Mr. Norbury graduated from Lyle in 1968 with a Mechanical Engineering degree, which served as an excellent foundation for his 58-year career in engineering at the Cary Products Company. Mr. Norbury's gift would transform the J. Lindsay Embrey Building's first-floor area into a vibrant, multi-disciplinary research support center.
- Mr. Henry C. Nelson, a 1960 graduate, attributes the success of his aviation company to his degree in Mechanical Engineering. Mr. Nelson has made an estate planned gift of \$750K, to be designated for scholarship support.
- Mr. Robert McDermott, President of Huitt-Zollars and Lyle Executive Board member, agreed to fund the renovations to the existing Huitt-Zollars Pavilion in the Embrey Building through a gift of \$150K.
- Dr. Lyle reviewed achievements at the Lyle School:
 - Dean Nader Jalili launched Lyle Reimagined, a campaign to reorganize leadership and reinvigorate Lyle faculty. Lyle Reimagined was a critical component of reorganizing the School's senior leadership team to bring a wealth of experience and innovation.
 - Lyle was in the process of hiring nearly 20 faculty positions for the 2023-2024 academic year. The positions aligned with a strategic hiring plan, predicted student enrollment, and curricular coverage, and would elevate Lyle's profile nationally.

- The newly established Academic Research Center (ARC) consisted of highly trained staff dedicated to contracts, grants, proposal preparation, submissions to government agencies and industrial organizations, research staff, grad student appointments, and budgetary support. ARC would be an integral part of Lyle's organization and would work collaboratively with SMU's sponsored research office.
- Three Lyle professors were awarded \$9M in research grant money to address critical issues in health disparities, gene therapy, and traffic management using AI and machine learning.
- Lyle would participate in SMU's lead position in the *Texoma Tech Hub*: a federally funded semiconductor tech hub focused on chip manufacturing in North Texas and Southern Oklahoma.

Ms. Peggy Sewell provided the Meadows School of the Arts Campaign Steering Committee update:

- Ms. Sewell began her report by showing a video created for the School's annual review to the Meadows Foundation.
- Ms. Sewell was pleased to highlight three notable gifts:
 - Ms. Barbara Mayfield made a legacy commitment towards the SMU Fund for Meadows. Gifts of estates held tremendous potential for Meadows, and the School was actively working to engage in similar conversations.
 - Journalism graduate Ms. Maggie Kelleher, along with her parents, Kathy and David, provided funding to renovate one of the main journalism classrooms. This was the first major gift from the Kelleher family to SMU.
 - Ms. Sewell said it wouldn't be a CEC meeting if Liz and Bill Armstrong weren't recognized for their exceptional generosity. The Dance department was thrilled to receive an investment from the Armstrongs which brought Mr. Silas Farley, one of the world's top male ballet dancers and instructors, to teach at Meadows.
- Ms. Sewell highlighted two performances taking place in spring 2024:
 - On March 10th the first official performance of the G. Marlyne Sexton Institute would take place in the Greer Garson Theater. Attending the performance would be a chance to be part of Meadows history.
 - Ms. Sewell said the Meadows at the Meyerson annual fundraising concert would be unlike any other in 2023. Mr. Stewart Copeland, former drummer of The Police, arranged their greatest hits for orchestra, and he would perform in person side-by-side with the Meadows Symphony Orchestra in *Police Deranged*.
- Ms. Sewell stated the Meadows School's principal campaign priorities were focused on endowing divisions within the School and chairs of those divisions, as well as a renovation to Bob Hope Theater – the primary stage for musical theatre, opera, and dance performances. Meadows was also focused on endowing the Director of Education position at the Meadows Museum.

Ms. Dodee Crockett and Mr. Joe Hardt provided the Perkins School of Theology Campaign Steering Committee update:

- Ms. Crockett reviewed some important gifts received:
 - Approximately \$400K from the United Methodist Church;
 - \$148K for The Marguerite Edwards Gipson Endowed Scholarship Fund;
 - \$124K for The Julie Ann Jones Memorial Scholarship Endowment;
 - \$87K gift from the James S. Seneker Trust for Religious Education.
- Ms. Crockett said student financial aid was a top fundraising priority, and progress continued to be made. Perkins was moving to make much of its education available online making it more accessible, fiscally and geographically, to students contemplating ministry-oriented careers. Most of Perkins School graduates enter employment opportunities which are not high-paying. The School made great strides over the last decade in increasing the financial aid awards in all of its degree programs. Through scholarship programs

like the Perkins Scholars, the Baugh Scholars, and various scholarship endowments, the Perkins School was able to offer scholarship packages last fall at an average of 92% of tuition charges in its master's degree programs. The development office continued to work to raise the percentage each year in order to move toward including mandatory fees. Ms. Crockett said this was a moving target because the Perkins School's main competitors were offering very generous scholarship packages, often including stipends on top of tuition and fees.

- Another priority facing Perkins was a search for a new Leighton K. Farrell Endowed Dean. Provost Lobo appointed Dr. Peter Moore to head the search process and employed the search consulting firm R. William Funk and Associates. The search committee was made up of 17 individuals from the faculty/administration of Perkins, the Perkins Executive Board, the United Methodist Church, Perkins student representatives, two SMU Trustees, and university representatives. The search committee had already met twice in fall 2023. Earlier the week Dr. Moore and Mr. Willie Funk had meetings with the Perkins faculty and the Perkins staff. Another meeting of the search committee will take place before the Christmas break. The expected timeline was to identify candidates by February 15, evaluate the pool by the end of February, select semi-finalists in early March, and have finalists' campus visits by mid-April. The selection and negotiation would be made in May. A June or July start date was anticipated.
- Mr. Hardt highlighted some upcoming events:
 - The popular series of Faith and Business Luncheons would feature Mrs. Sandra Moon on January 22 and Coach Rhett Lashlee on April 22. Mrs. Moon was a senior executive of the Sam Moon Group, which owned the JW Marriott Arts District Hotel among many other properties. Coach Lashlee was, of course, the highly successful coach of SMU's football team which was soon to enter the ACC.
 - The Bolin Family Public Life Personal Faith Scholarship Luncheon featuring Trustee Mr. Clark Hunt would take place on March 19.
 - The dedication of the Caren and Vin Prothro Organ would take place at a time still to be determined. A number of donors along with Mrs. Prothro and Vice President Cheves had the opportunity to observe and listen to the almost completed organ several weeks ago. The historic Skinner organ will be enjoyed by many generations on our campus.

Mr. Dick Collins provided the Simmons School of Education Campaign Steering Committee update:

- Mr. Collins was pleased to share an update on the progress of Simmons' fundraising campaign, academic successes, and plans for moving forward. Mr. Collins said the Simmons School joined the top 50 Best Graduate Schools in the US in *U.S. News and World Report* and was currently ranked 11th in top private universities in the US.
- These rankings meant scholarship support remained a high priority to ensure the best students were being cultivated. The 25 by 2025 fundraising initiative aimed to secure 25 new scholarships by 2025 to support the *Simmons Scholars Fund*, which provided vital dollars for Simmons students in areas of highest priority. While students were selected from any of Simmons' five academic departments, a special emphasis was placed on teachers and educational leaders. This would make a difference as new students were recruited to Simmons and continue to develop the human capital pipeline in education.
- Support continued to be sought for West Dallas STEM School Partnerships. Simmons' work at West Dallas Stem School was empowering outstanding students and community through an innovative partnership with Toyota, DISD, and many nonprofit partners. The West Dallas STEM School was nominated for Innovation, Leadership and Collaboration of the Year by *D CEO Magazine* for Simmons' model partnership with the West Dallas Community, DISD, and Toyota.
- Mr. Collins said the School planned to increase collaborations by adding more operational support, teacher scholarships, a learning garden, as well as family counseling and legal clinics. Ultimately, the goal was to develop Simmons' public and private partnership school model by scaling collaborative work to other communities. To accomplish this, the School was working with prospective donors and partners.

- Another third initiative Mr. Collins addressed was the Technology Enhanced Immersive Learning (TEIL) Cluster which used the application of immersive and interactive technology to improve learning and facilitate behavior change in a variety of subjects. This approach empowered students and participants to become active agents of their learning environment, especially those underserved by the traditional learning experience.
- The TEIL cluster was recently awarded a grant from the Department Of Justice to enhance de-escalation training curriculum for the Dallas Police Department, which they will do by integrating virtual reality (VR) technology in their training. TEIL was seeking permanent funding in the form of a named, endowed program fund of \$3.75M, which included immediate operational funding for 5 years plus a permanent endowment gift to help TEIL extend its research horizon into the future.
- The last fundraising priority Mr. Collins mentioned was the Applied Physiology and Sports Management program. Sports Management was the fastest growing program at Simmons and had growing demand in the region. The Masters in Sports Management program was recently ranked #1 in Texas, #14 in the US, and #18 worldwide from *Sport Business Post Graduate Rankings of 2023*. The Simmons School was planning the development of a Sports Management Institute to prepare a talented and diverse workforce to meet the region's current needs. Through the SMU International Sports Business Institute, Simmons students would be given the opportunity to expand their knowledge base, take part in groundbreaking research and receive guidance from world-renowned experts in one of the most exciting cities in the world for sport management and business.
- Mr. Collins said the Simmons rankings and recent news were a testament to the rigor of its programs, faculty and students, alumni employment success, and overall academic excellence of the program.

Mr. Bruce Robson provided the Athletics Campaign Steering Committee update:

- Mr. Robson reported Athletics was targeting three main priorities for the *Ignited* campaign:
 - ACC Competitiveness Fund
 - The Weber End Zone Complex
 - Ongoing operating support – the Mustang Athletic Fund, Circle of Champions, and the Vision 2025 Football Support Fund
- The ACC Competitiveness Campaign would provide necessary funding to compete in the new league on July 1st. The Weber End Zone Complex will be a game changer for SMU's football program when it opened in summer 2024. Mr. Robson said efforts continued to provide unrestricted operating dollars to help the University's Athletics department continue its daily mission of serving 484 student-athletes.
- Mr. Robson stated the successes of fall sports showed how the investment was already paying off:
 - SMU's fall sports had a combined conference record of 38-4-2.
 - Football celebrated its first conference championship in 40 years and would attempt to go for its 12th win in the Fenway Bowl vs Boston College on December 28.
 - Men's Soccer advanced to the Sweet 16.
 - Volleyball won the AAC championship, and advanced to NCAA tournament.
 - Men's tennis signed the No. 1 recruit in the country.
 - Men's Swimming and Diving were ranked as high as No. 21.
 - Women's Soccer competed in the AAC title match.
- Mr. Robson was pleased to announce Athletics accounted for over \$312M of the campaign total.
- To support the ACC Competitiveness Campaign, SMU had been hosting events around the state including a dinner with 50 prospective donors in Houston and a mixer with 30 more donors at Northwood Club right in Dallas. Other engagement opportunities on the horizon included the opening of the Holt Hickman Outdoor Pool

at the Robson & Lindley Aquatics Center on December 8, the conclusion of the \$25M fund drive the same day and the Fenway Bowl on December 28 in Boston. Tickets to the Bowl game were still available.

Mr. Cheves provided an update on SMU-in-Taos, SMU Libraries, and Student Affairs.

- Libraries' campaign priorities included an Endowment for the Special Collections Leadership and Conservation Lab and an Endowment for the Librarian Internship Program. Special collections continue to be a strength of the SMU Libraries. One noteworthy acquisition was Mr. Larry McMurtry's collection of travel writing by women. There was information on additional special collections included in the meeting materials.
- Campaign priorities for SMU-in-Taos included academic scholarships, program support, and campus renovations. Since the last CEC meeting in May, SMU in Taos hosted students in New Mexico for May Intercessions, followed by the 2023 Cultural Institute from July 20 - 23. The Institute debuted 9 new classes and had 44 new attendees. There would be an announcement in January for the new class offerings for the Cultural Institute in July, 2024.
- The Spirit Program, spearheaded by Bill and Liz Armstrong, was working to enhance and keep pace with peer institutions in the ACC. There were multiple alumni-lead giving opportunities to increase and grow support for Peruna, and enhance Cheer and Pom. The Armstrongs recently held an event to raise awareness and engage alumni in this initiative. They were looking to raise \$300K in \$10K units. Band was also a program soliciting support in the near future, to assist the University as it entered the ACC. Another Student Affairs priority included Mental Health and Wellness, which continued to improve their programming for students. They had received several major gifts in support of this initiative, including some gifts from parents.
- Mr. Cheves reviewed upcoming campaign events, highlighting the following:
 - The Holt Hickman Pool dedication on December 8, 2023
 - The David B. Miller Quadrangle dedication on May 3, 2024, including all the new and renovated facilities of the Cox School
 - The Garry Weber End Zone Complex dedication at in August 2024

Mr. Miller gave the floor to Dr. Turner to provide campaign results.

- Dr. Turner announced the campaign total: \$1,218,653,856 which was 81% of the entire fundraising goal.
- Dr. Turner said the distribution was roughly equivalent between capital, endowment, and operations. Of the total commitments, over \$700M in pledges had been received. Dr. Turner brought the Committee's attention to a chart showing the campaign's progress to date compared to the overall goal. Progress continued to be above the goal line.

A campaign event highlight video was shown.

With no further business, the meeting was adjourned.

**Meeting of the Campaign Executive Committee
May 2, 2024, 11:00 am, Mack Grand Ballroom**

MEETING MINUTES

At 11:00 am, Mr. David Miller called the meeting to order.

- Mr. Miller welcomed the Committee members to the tenth meeting of the Campaign Executive Committee, the fifth since the launch of the *Ignited* campaign.
- Mr. Miller stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, seated to his left and right, along with the co-chairs of the Campaign Steering Committees, seated around the open table.
- Mr. Miller noted the others present: the President’s Executive Council, academic deans, and the Vice Provost for Research and Chief Innovation Officer. Mr. Miller also welcomed campaign consultant Mr. Bob Sweeney.
- Mr. Miller also recognized the staff leadership of Development and External Affairs as well as Directors of Development who support the Campaign Steering Committees.

Mr. Miller gave the floor to Dr. Turner for the President’s report.

- Dr. Turner said our move to the ACC continues to draw enthusiasm and financial support, and we’re seeing more and more the impact of the Campaign in areas all across campus.
- Dr. Turner highlighted the principal gifts he reported at the February Board meeting:

| Donor | Purpose |
|--|--|
| Anonymous (Felix Tsai) | Tsai Endowed Center for Law, Science & Innovation |
| Anita Ray Arnold and Truman Arnold | Cox School Renovation and Expansion Fund |
| Carter B. Ewing and Sarah A. Ewing | Garry Weber End Zone Complex |
| Linda Wertheimer Hart ’65 and Milledge (Mitch) A. Hart, III | Cox School Renovation and Expansion Fund The Endowed Director of the Center for Presidential History |
| The Jeanne R. Johnson Foundation | Cox School Renovation and Expansion Fund Division of Music The Jeanne R. Johnson Endowed Music Faculty Excellence Fund |
| Jan and Trevor D. Rees-Jones ‘78 | The Rees-Jones Library of the American West Acquisition Fund |

| | |
|--|--|
| Carl Sewell '66 and Peggy Higgins Sewell '72 | Circle of Champions Sewell BBA Scholars Dedman College Scholars |
| Catherine Susser and Sam L. Susser and Susser Bank Holdings, LLC | Cox School Renovation and Expansion Fund |
| Leland B. White '72 and Monica Hillenbrand White '87 | ACC Competitiveness Campaign The Leland White Family Endowed Engineering Scholarship Fund Opportunity SMU Endowment Fund |
| The Ida Family – Billie Ida Williamson '74 and Mack Forrester | Cox School Renovation and Expansion Fund |

- Dr. Turner then announced the new principal gifts between March and May 2024, which he will report to the Board of Trustees tomorrow:

| Donor | Purpose |
|--|---|
| Diane M. Brierley and Harold M. Brierley | Cox School Renovation and Expansion Fund |
| Anne R. Bromberg | Meadows Museum Endowment Meadows School of the Arts Endowment |
| James D. Dondero | Cox School Renovation and Expansion Fund |
| Tracey Nash-Huntley '81 and David S. Huntley '80, 82 | Dedman Law Centennial Scholarship Dedman College Scholarships Connect Mentoring Program |
| Jan and Trevor D. Rees-Jones '78 | ACC Competitiveness Campaign |
| Walter G. Sheffield | Walter G. Sheffield Endowed MBA Scholarship Fund |
| Claire Morris Spaht '94 and Paul Holden Spaht, Jr. | The Claire Morris Spaht Endowed Chair Fund and The Spaht Family Student Immersion Fund |

- Dr. Turner then mentioned exciting events and announcements since the Committee last convened:
 - The December dedication of the Holt Hickman Outdoor Pool at the Robson & Lindley Aquatics Center
 - The February ACC donor thank-you event and Weber hardhat tour
 - Meadows at the Meyerson in April
 - The April hiring of our new men's basketball coach, Andy Enfield

- Tomorrow's dedication of the David B. Miller Business Quadrangle, which the Committee will hear more about shortly.
- Dr. Turner concluded his report and gave the floor to Brad Cheves for the Campaign Steering Committee updates.

Ms. Jeanne Phillips provided the National Steering Committee update:

- Beginning with the National Campaign, Ms. Phillips reminded the Committee the purpose of the National Campaign Committee: to build, strengthen, and engage the national and international SMU alumni, parents, and friends network through in-person and regional engagement methods.
- Ms. Phillips recognized the Co-Chairs of the National Campaign Committee:
 - Scott McLean, Co-Chair
 - Marty Flanagan, Co-Chair
 - Richard Ware, Co-Chair
 - Ed Wilson, Co-Chair
- Ms. Phillips said Dallas, Houston, and the state of Texas as a whole are currently accounting for an overwhelming majority of our fundraising production to-date.
- Regions such as Florida, DC, and California continue to have strong donor participation rates.
- Ms. Phillips highlighted some recent gifts from a National perspective from this fiscal year:
 - \$2M from Claire and Holden Spaht, out of San Francisco, towards the Meadows School of the Arts
 - \$1M from Carter and Sarah Ewing, out of Newport Beach, towards the Weber End Zone Complex
 - \$500K from Greg and Stacey Lubar, out of Miami, towards Cox Capital Renovation
 - \$100K from Chuck and Kate Brizius, out of Boston, towards the ACC Competitiveness Campaign
- Ms. Phillips mentioned the stewardship event held in February for our ACC Competitiveness Campaign, as well as the event in Nashville for Cox alumni and admitted students.
- Ms. Phillips said as *SMU Ignited* continues moving forward, we are certain this important groundwork and influx activity will pay dividends in terms of student recruitment, stewardship, and philanthropy.
- The national rollout for this campaign continues to unfold and we have multiple upcoming events in the works, including in San Francisco surrounding the football game against Stanford, and we are working on securing a date for an event in the Palm Beach area in 2024 or early 2025.

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- Mr. Bridwell said tomorrow at 11:30, the dedication and ribbon cutting of the David B. Miller Business Quadrangle would occur, celebrating the new and renovated facilities.
- Classes will begin in the new facilities in August and faculty and staff will move in over the summer.
- Mr. Bridwell expressed his gratitude for everyone who has made this vision a reality, and thanked the many donors to the project.
- Mr. Bridwell discussed the Cox fundraising priorities, namely:
 - The Cox Renovation and Expansion fund, which has raised \$138M toward the \$140M goal. We still have many key naming opportunities available at various levels.

- MBA Scholarships. Our MBA Scholarship drive has raised \$22M towards our \$30M campaign goal. Scholarships are crucial to Cox, as they ensure that we are able to attract and retain high-quality MBA-level students.

Mr. Jon Altschuler provided the Dedman College Campaign Steering Committee update:

- Mr. Altschuler first highlighted Dedman College's campaign priorities: The Fund for Faculty and Research Success, the Human Rights Program Endowment, and the Dedman College Scholars Program.
- As of February 2024, our campaign total for Dedman College has reached an impressive \$47.7M and counting. This milestone speaks volumes about the dedication and passion of our alumni, donors, and friends who believe in the transformative power of education at SMU.
- Since December 2023, we have received several significant gifts to the Human Rights Program to support critical research. Each contribution serves as a testament to the unwavering commitment of our supporters to advance education, research, and service.
- As of May 2024, the *SMU Ignited* Campaign total for Dedman College is \$47.7M. Since last Spring, Dedman College raised about \$6M.
- Mr. Altschuler then highlighted Dedman College's achievements and activities over the last few months:
 - Mr. Altschuler congratulated fellow co-chair, Ashlee Kleinert, on her reception of the prestigious J. Erik Jonsson Ethics Award last month, alongside her husband, Chris, recognizing their incredible leadership in civic responsibility and public service.
 - This past spring, the Dean's Research Council awarded over \$250K in research seed funding to nine Dedman College researchers. These awards are testaments of our donors' investment in SMU's commitment to pushing the boundaries of knowledge and innovation.
 - Dedman College celebrated the total solar eclipse, with members of the Physics Department presenting and projecting the eclipse. This celebration reaffirmed our commitment to science as well as public engagement.
 - Dedman College just had what may be its best faculty hiring season ever. We have significantly strengthened our ranks in physics with the inclusion of a new astrophysicist and an experimental particle physicist. We have also added to our ranks in chemistry with a new computational chemist and an inorganic chemist.
 - Dedman College has made six of the eight hires in the new faculty cluster in Urban Research, which, combined with our Data Science cluster, will allow us to make unprecedented analyses of our own and other world-class cities. We will be front and center in discovering more ways of making Dallas better as the city goes through the growth we are expected to have.
- Finally, Mr. Altschuler recognized and thanked Dean DiPiero for his tenure and his leadership as he transitions out of the role.

Mr. Jim Baldwin provided the Dedman School of Law Campaign Steering Committee update:

- As the law school will celebrate its centennial anniversary in February of 2025, Mr. Baldwin shared some of its recent achievements:
 - The Dedman School of Law achieved its highest ranking ever in the *US News and World Report*, placing #42 in the nation.
 - We are ranked #10 nationally in placement for JD advantaged and bar passage required positions. For placement in large law firms, Dedman School of Law is ranked 21st nationally, and with these two rankings in consideration, we are first in the state of Texas.
 - In admissions, we have built the highest credentialed class in the history of the law school. These students have a median LSAT of 165 and a median GPA of 3.86.

- Mr. Baldwin then discussed the Dedman School of Law’s campaign priorities, supporting the *SMU Ignited* campaign and its initiatives for community engagement, student support, and campus investments:
 - We have launched a matching gift scholarship program. Donors who contribute six-figure operational scholarships will have a permanent endowment created in their name through a match program of 1:1. Operational scholarships are used immediately to recruit and retain the best and brightest students who reflect our core values and demonstrate the highest academic achievements. In a few weeks, we will conclude the planning phase of our feasibility study of the law quad and reveal new plans to enhance these spaces through a transformational remodel. Once plans are finalized, we will begin fundraising.
 - Experiential learning and faculty support are signature elements in what makes the law school a special place. Supporting faculty research and some of our life-changing programs, like the pro-bono legal clinics and the corporate counsel externship program, ensure that the law school is transformative for our students.
- Mr. Baldwin concluded his report by highlighting the following upcoming events:
 - State Bar of Texas: June 20
 - Out-of-State Alumni Events: Summer 2024
 - Family Weekend Tailgate: September 28
 - Homecoming Tailgate: November 2
 - Nina Totenburg: January 30
 - Centennial Celebration: February 2025
 - SCOTUS Swearing In: March 2025

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- Dr. Lyle said Dean Nader Jalili has been focused on several priorities, including:
 - Research Partnerships, for which \$22M of the \$40M goal has been raised. Research partnerships include transformative partnerships in both Digital and Human Augmented Manufacturing and materials Genome for Energy and Semiconductors.
 - Innovating Lyle’s Student-Centered Engineering Curriculum, for which \$15M of the \$24M goal has been raised. Lyle’s innovative engineering curriculum equips undergraduate students with both traditional credit-bearing and non-traditional project-based learning experiences, ensuring its graduates are prepared to emerge as highly qualified employees upon graduation.
 - Lyle’s Digital Education via Lyle Anywhere, of which \$2M of the \$6M goal has been raised. Lyle’s innovative approach using the Lyle Anywhere platform offers students the flexibility to learn in-person or remotely, in real-time or asynchronously, catering to diverse learning styles and circumstances.
- Dr. Lyle then gave a fundraising update and highlighted some major gifts. He shared as of May 31, Lyle’s campaign total is over \$85M with \$54.4M in endowed giving and \$30.5M in operational giving.
- Since the December 2023 CEC meeting, Mrs. Noriko Sharp has made a planned gift of \$11M that will go towards research. The Robert Cloud and Ruth Womack Foundation gave a \$100K gift to support the Dean.
- Dr. Lyle closed his report by highlighting the renovations on the new Center for Digital and Human Augmented Manufacturing (C.D.HAM), to be completed in May. The 5,000+ square-foot Center will explore how digital modeling, simulations, augmented reality, robotics, automation, and artificial intelligence will shape the future of the engineering industry.

Ms. Sarah Perot provided the Meadows School of the Arts Campaign Steering Committee update:

- Ms. Perot began her report by providing an update on fundraising and highlighting select new principal and major gifts, which totaled approximately \$13M:
 - The passing of Dr. Anne Bromberg, a dear friend of the arts in Dallas and at Meadows, resulted in a \$5.5M estate gift. These funds will endow a faculty position, as well as support the Meadows School and Meadows Museum's unrestricted endowments.
 - The Jeanne R. Johnson Foundation has endowed an exceptional commitment to support the adjunct music faculty. This gift will further strengthen the rich partnership between Meadows and the Dallas Symphony Orchestra.
 - Meadows Dance alumna Jayme Keithley has made a \$750K bequest to support dance and art history.
- Ms. Perot announced a new endowed division chair for the first time in over twenty years. Meadows Art History alumna, Claire Spaht, has named the Claire Morris Spaht Chair of the Division of Art with a gift of \$2M. Included in this gift is a special immersion fund to support student travel.
- Ms. Perot then highlighted the following priorities for the Meadows School:
 - Endowing faculty chairs and academic divisions
 - Renovating facilities including: Corporate Communications and Public Affairs spaces, and the Bob Hope Theatre
 - Establishing Scholarships
- Ms. Perot shared recent activities and achievements of the Meadows School:
 - The "soft launch" of the Sexton Institute for Musical Theatre on March 10
 - Meadows at the Meyerson featuring Stewart Copeland and the Meadows Symphony Orchestra on April 16. Mr. Copeland was honored as 2024 Meadows Award recipient. The Meadows Symphony Orchestra performed with Mr. Copeland, raising over \$400K for need-based student scholarships.
 - The awarding to Temerlin Advertising Institute students of a collective 88 recognitions
- Ms. Perot concluded her report by sharing two upcoming events. The Meadows School Commencement will occur May 11, at which Meadows alumnus Brian Bumgartner – best known as Kevin from "The Office" – will deliver the commencement address. Opening September 22nd, the Meadows Museum will offer a special exhibition of the works of acclaimed artist and longtime Meadows faculty, Barnaby Fitzgerald.

Ms. Julie Yarbrough provided the Perkins School of Theology Campaign Steering Committee update:

- Ms. Yarbrough reviewed some important gifts received, from:
 - The estate of Anthony C. Cecil, Jr. '67 to the SMU Fund for Perkins Theology
 - The estate of Corinne C. Richardson to the SMU Fund for Perkins Theology
 - The Julie A. Jones Memorial Theological Scholarship Fund to The Julie Ann Jones Memorial Scholarship Endowment
 - The UMC General Board of Higher Education and Ministry (GBHEM)
- Ms. Yarbrough then discussed Perkins' funding initiatives. She said notwithstanding the challenges of the current leadership transition, Perkins continues to make progress in raising scholarship funds. This year, financial aid packages that averaged 92% of tuition were given to masters-level students. This is a significant advancement over the last ten years and reflects both the strength of the Perkins Executive Board and the single-minded focus of the Perkins development office.

- Ms. Yarbrough said the goal at Perkins is to make progress each year in enhancing financial aid packages to include tuition, University fees of about \$7,000, and other expenses that students incur. Long-term, our scholarship endowments will allow us to achieve this goal. Until then, we continue to work to ensure that Perkins graduates, who typically have a vocation in ministry, will not be encumbered by educational indebtedness after they receive a degree from Perkins.
- Ms. Yarbrough then provided some updates from recent events and activities within Perkins. She said Perkins received a planning grant from the Lilly Endowment to prepare a \$2.5M grant proposal to enhance the exhibition spaces in Bridwell Library. Several years ago, the University received the gift of the World Methodist Museum, which helped to secure this planning grant.
- The Executive Board of Perkins was featured recently in the Spring edition of *In Trust* magazine. The article focused on how the Executive Board functions and how it helps Perkins advance its mission and identity as an embedded theological school within Southern Methodist University.
- On March 19, Perkins hosted its annual Public Life Personal Faith Scholarship luncheon.
- Ms. Yarbrough concluded by highlighting some recent and upcoming events:
 - Reverend Richie Butler interviewed guest speaker Clark Hunt, who brought the Lombardi Trophy with him to the event. A dedicated space allowed those at the luncheon to take a picture with the trophy. Jane and Pat Bolin have been the naming sponsors of the Perkins Scholarship Luncheon for the last 14 years. Beginning next year, Judy and Jim Gibbs will become the naming sponsors of the event.
 - The long-awaited dedication of the Caren and Vin Prothro Organ in Perkins Chapel will occur in September. The entire Perkins community looks forward to the inauguration of this extraordinary historic instrument, which has been refurbished and installed using state-of-the-art technology. We are grateful for Gay and Bill Solomon's leadership gift.

Mr. Dick Collins provided the Simmons School of Education Campaign Steering Committee update:

- Mr. Collins began by sharing Simmons' top priorities:
 - He said scholarship opportunities remain a critical priority. The modest earning potential in education can make tuition costs a significant barrier for prospective students. The School's "25 by 2025" fundraising initiative, which aims to secure 25 new scholarships by 2025, has reached an initial milestone of raising one million dollars for new scholarships.
 - We aim to prioritize STEM education in high-need areas of Dallas, with a dedicated effort to enhance scholarship support, thereby extending opportunities to a greater number of teachers and educational leaders.
- Mr. Collins reported:
 - Dr. Corey Brady has secured funding for a partnership with DISD and local schools to introduce advanced mathematical modeling to 7th graders in Dallas.
 - Dr. Lin Lipsmeyer is representing the Simmons team on the Texacoma Tech Hub for tech advancement and educational integration.
 - The Budd Center has established the Family Learning Hub with West Dallas STEM, offering monthly programs that promote family involvement in science and education. The center has gained media recognition from Fox 4 and NBC 5.
 - A significant donation has enabled the inclusion of 10 West Dallas STEM School students as Simmons Scholars, participating in programs such as *Teaching & Learning, Education Leadership, Dispute Resolution, and Counseling*.
- Concerning Simmons' significant achievements and highlights, Mr. Collins shared former President George W. Bush visited Dr. Bertrand's Applied Physiology and Sports Management class, sharing presidential stories, life lessons, and contemporary insights.

- Mr. Collins concluded his report by reporting Simmons' national ranking has improved from 49th to 48th in the *U.S. News & World Report's* best education schools.

Mr. Bill Armstrong provided the Athletics Campaign Steering Committee update:

- Mr. Armstrong reported Athletics was targeting three main priorities: the ACC Competitiveness Campaign, the Weber End Zone Complex, as well as ongoing operating support (the Mustang Athletic Fund, Circle of Champions, and the Vision 2025 Football Support Fund).
- Athletics has raised \$122M toward the \$125M goal for the ACC Competitiveness Campaign and launched its "Drive for Five", with a goal of securing 5,000 Mustang Club members by July 1. Our previous record was 3,500 members, and Mr. Armstrong said he is proud to report current membership stands at 4,650, representing an all-time record.
- The Weber End Zone Complex continues to take shape as it moves closer to completion, and a grand opening is planned for early September. We have raised \$84M toward the goal of \$100M.
- Mr. Armstrong reported SMU has already sold a record 11,000 football season tickets, and basketball season ticket renewals are now underway.
- Mr. Armstrong mentioned the hiring of new men's basketball coach, Andy Enfield, and shared some highlights of his resume, including: six NBA draft picks; five NCAA tournament appearances; and former ACC experience as Florida State assistant coach.
- Mr. Armstrong gave a campaign update with the following highlights:
 - Five All-Americans for Men's Swim & Dive
 - 3,000 donations to Athletics on Giving Day
 - 4,500+ Mustang Club members
 - 12,000+ paid football season ticket holders
 - \$124.5M to the ACCC Competitiveness Campaign
- Finally, Mr. Armstrong shared some upcoming events and opportunities:
 - Head football coach Rhett Lashlee's tour of Texas with stops in Houston and Austin
 - A July 1st celebration commemorating SMU's first day of membership in the ACC
 - Alumni tailgates at all five away ACC football games

Mr. Cheves provided an update on SMU-in-Taos, SMU Libraries, and Student Affairs.

- The renovation of the Scholars Den in Clements Hall was completed on February 29. Faculty, Staff, and students were welcomed back to the space after Spring Break. The Clements Foundation Scholars Den was made possible with gifts from members of the Clements families along with other parents and students.
- In January, SMU-in-Taos held its winter courses known as "JanTerm". There were 74 students enrolled this year, representing an increase of 54% over the 2023 JanTerm.
- SMU will host the SMU-in-Taos Cultural Institute, July 18-21. Currently, we have 120 registrants for the weekend.
- Campaign priorities for SMU-in-Taos include academic scholarships, program support, and campus renovations.
- Mr. Cheves then shared several Library updates from this semester:

- Holly Jeffcoat hosted the second annual “Brunch with the Dean” with a lecture and tour of SMU’s World Methodist Collection, led by Bridwell Library Director, Anthony Elia.
 - The 2024 Tables of Content fundraiser was held in March and included the presentation of the 14th annual Literati Award to Sports Radio legend Norm Hitzges. The event raises funds to support the SMU Libraries’ internship program and other library priorities.
 - The DeGoyler Library acquired two noteworthy collections. From the estate of Anne Bromberg, it received a collection of over 100 rare books. One of the highlights of this collection is the L. Frank Baum “Oz” series, first and early editions.
- Mr. Cheves cited the endowment of the Dean’s position as well as general support for the Libraries as the main campaign priorities for SMU Libraries
 - For the Division of Student Affairs, Mr. Cheves reported an increased focus on the growth of the Spirit Programs at SMU as we transition into the ACC. We will not only have increased gameday experience opportunities reflective of our peers in our new conference, but these increased efforts will also strengthen enthusiasm for SMU and SMU Athletics. The SMU Spirit Programs include Pom, Cheer, Peruna, and Band. New gifts to these areas have been provided by alumni, friends, and parents who have rallied behind our Spirit Programs in preparation for next season.
 - Student Affairs has launched the new Connect Mentor Program. It is a year-long mentorship program aimed at retaining first-generation college students. Mentors help these first-year students develop personally and academically by introducing them to various resources, learning opportunities, and co-curricular experiences offered on campus.
 - The Division of Student Affairs is very proud of their Giving Day results. Once again, Student Affairs Initiatives led the way by garnering support from students, alums, and parents, resulting in over \$237K in gifts.
 - Mr. Cheves highlighted upcoming campaign events, including:
 - ACC gameday events for all conference away games (at Louisville, Stanford, Duke, and Virginia)
 - The May 3 dedication of the David B. Miller Business Quadrangle
 - The Garry Weber End Zone Complex Dedication
 - The dedication of the Caren and Vin Prothro Organ in Perkins Chapel on September 30
 - The Cox Campaign Donor Celebration on October 17.

Mr. Miller gave the floor to Dr. Turner to provide campaign results.

- Dr. Turner announced the campaign total: \$1,316,661,448, representing 87% of the entire fundraising goal.
- Dr. Turner said the distribution was roughly equivalent between capital, endowment, and operations. Of the total pledges, over \$750M in payments had been received. Dr. Turner brought the Committee’s attention to a chart showing the Campaign’s progress to date compared to the overall goal. Progress continued to be above the goal line.
- Dr. Turner concluded his report by noting we have come a long way since our Public Phase launch, with plenty of exciting and worthy projects to come. He mentioned the law school centennial celebration supporting scholarships and facilities, all of our newfound opportunities as a member of the ACC, our advancement toward R1 status, and our continued march forward to meet our endowed faculty and student support goals, as examples.

With no further business, the meeting was adjourned by Mr. Miller.

**Meeting of the Campaign Executive Committee
December 5, 2024, 11:00 am, Mack Grand Ballroom**

MEETING MINUTES

At 11:00 am, Mr. David Miller called the meeting to order.

- Mr. Miller welcomed the Committee members to the eleventh meeting of the Campaign Executive Committee, the sixth since the launch of the *Ignited* campaign.
- Mr. Miller stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, seated to his left and right, along with the co-chairs of the Campaign Steering Committees, seated around the open table.
- Mr. Miller noted the others present: the President’s Executive Council, academic deans, and the Vice Provost for Research and Chief Innovation Officer.
- Mr. Miller recognized the Development and External Affairs staff leadership as well as the Directors of Development. Mr. Miller also welcomed campaign consultant Mr. Bob Sweeney.

Mr. Miller gave the floor to Dr. Turner for the President’s report.

- Dr. Turner said our move to the ACC continues to draw enthusiasm and financial support, and we’re seeing more and more the impact of the Campaign in areas all across campus.
- Dr. Turner then announced the new principal gifts since the CEC meeting in May, which he reported to the Board at their September meeting:

| Donor | Purpose |
|---|---|
| Anita Ray Arnold and Truman Arnold | Cox School Renovation and Expansion Fund |
| Arnold Ventures (Laura and John Arnold Foundation) | The Deason Criminal Justice Reform Center |
| Estate of Anne R. Bromberg | Dedman School of Law Endowed Support |
| Matthew H. Fleegeer ’87 and Valerie “Candee” Fleegeer ’86, ’90 and the Fleegeer Family Foundation | ACC Competitiveness Campaign Garry Weber End Zone Complex |
| Linda L. Gardner and W. Fred Alsup | The Linda Gardner and Fred Alsup Endowed Senior Curator Fund The Linda Gardner and Fred Alsup Endowed Fellowship for Research in Spanish Art |

| | |
|---|---|
| Nancy Ann Hunter Hunt ’65 and Ray L. Hunt ’65 | The Nancy Ann and Ray L. Hunt Leadership Scholars Program Endowment Fund |
| Jeremy M. Lacy ’96 | The Jeremy M. Lacy Endowed Mustang Athletic Fund The Jeremy M. Lacy Endowed Scholarship Fund |
| Jodi K. Pratt and Kenneth W. Pratt | Basketball Capital Improvements |
| Karen Johnson Scharbauer ’74 | ACC Competitiveness Campaign |
| Sarah A. Scharbauer ’03 | ACC Competitiveness Campaign |

| | |
|---|---|
| Kim M. Shaddock and William C. Shaddock '74 | Garry Weber End Zone Complex |
| Robert G. Skinner | General University Unrestricted Support |
| Gayle Stoffel | Gayle and Paul Stoffel Endowed Meadows Scholar Fund |
| Laurie-Leigh Nix White '07, '08 and Charles E. White, III | Cox School of Business Support Mustang Athletic Fund |

- Dr. Turner then shared the list of new Principal Gifts, which he said he would report to the Board at their meeting tomorrow:

| Donor | Purpose |
|---|--|
| Anonymous | Cheer/Pom Operational Support, Conditional Challenge Pledge |
| Lydia and Bill Addy and The Addy Foundation | The Addy Center on Research and Evaluation |
| Dallas Institute of Humanities and Culture | New Humanities Institute in Dedman College |
| Hamon Charitable Foundation | Hamon STEM Education Programs Hamon Thrive Scholars Fund |
| Estate of Carolyn Vestal Kelly '67, '83 | General University Endowment |
| Amy B. Korenvaes and Harlan B. Korenvaes | President's Discretionary Fund |
| Jan and Trevor D. Rees-Jones '78 | The Rees-Jones Library of the American West Acquisition Fund |
| The Rhines Foundation – Mrs. Paula H. Rhines and Dr. Walden C. Rhines | The Rhines Ph.D. Fellowship |

- Dr. Turner then mentioned exciting events and announcements since the Committee last convened:
 - The day after the May CEC meeting, SMU dedicated the David B. Miller Business Quadrangle and recognized donors to the project.
 - The SMU-in-Taos Cultural Institute in July was very well attended and created enthusiasm around new campus development.
 - SMU dedicated the Garry Weber End Zone Complex, thanks to significant contributions from Garry Weber, the Armstrongs, and many others.
 - We dedicated the new organ in Perkins Chapel in honor and memory of Caren and Vin Prothro.
 - Finally, SMU held an event at Cox honoring Campaign donors to the School, which provided an opportunity for those major donors to tour the new facilities within the Miller Quadrangle.
- Dr. Turner then gave the floor to Brad Cheves for the Campaign Steering Committee updates.

Ms. Jeanne Phillips provided the National Steering Committee update:

- Ms. Phillips reminded the Committee the purpose of the National Campaign Committee: to build, strengthen, and engage the national and international SMU alumni, parents, and friends network through in-person and regional engagement methods.
- Ms. Phillips recognized the Co-Chairs of the National Campaign Committee:
 - Scott McLean, Co-Chair
 - Marty Flanagan, Co-Chair
 - Richard Ware, Co-Chair
 - Ed Wilson, Co-Chair
- Ms. Phillips shared some recent gifts, including:

- A \$1.2M planned gift from Robert Skinner in Florida
- A \$400K pledge to the Small Town and Rural Students (STARS) College Network Fund, from Trott Family Philanthropies in Chicago
- A \$272K pledge from Paula and Kathleen Flather to the Flather Family Endowment in California
- Ms. Phillips mentioned recent National events, such as:
 - Gatherings at away ACC football games
 - Louisville: private reception at the home of Ceci and Dale Boden
 - Stanford: private reception at the St. Regis, as well as an alumni tailgate with over 700 Mustang fans in attendance
 - Duke: Partnership with Anthony Travel resulting in a sold-out travel package for our supporters traveling to Durham
 - Virginia: private reception on Friday night hosted by Suzanne Youngkin

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- Mr. Bridwell reported the David B. Miller Business Quadrangle opened for classes in August 2024.
- Mr. Bridwell said the Cox School of Business hosted Cox MS and MBA reunions on homecoming weekend in the new Quadrangle.
- The Cox Distinguished Alumni Awards event will be taking place Spring of 2025.
- Mr. Bridwell mentioned the Cox fundraising priorities as:
 - MBA Scholarships
 - BBA Scholarships
 - Faculty positions and academic programs

Ms. Ashlee Kleinert provided the Dedman College Campaign Steering Committee update:

- Ms. Kleinert shared the Dedman College Scholars Program currently supports 94 students. In fall 2024, 26 new students joined SMU solely because of these scholarships.
- Dedman College committed \$3.5M in startup funding for 17 new tenure-track faculty hired in 2024. Additionally, 13 tenure-track faculty searches are underway for the next academic year.
- Ms. Kleinert shared faculty achievements in the last six months, including:
 - Nicolay Tsarvesky, Associate Professor named American Chemistry Society fellow
 - Zhong Lu, Shuler-Foscue Chair in Earth Sciences named American Geophysical Union fellow
 - Andrea Laurent Simpson, Lecturer in Sociology: Distinguished Book Award from the American Sociological Association
- The Dallas Institute of Humanities and Culture has joined Dedman College, transferring assets worth approximately \$12M, including its endowment and operational funding, as well as proceeds from the sale of its headquarters.
- Ms. Kleinert shared recent gifts, including:
 - \$400K from ISEM Inc. to support fellows in Anthropology and Earth Sciences

- \$180K from The Perot Foundation for Center for Presidential History
 - \$150K from Betty Regard for SMU Human Rights Program
 - \$100K from The Welch Foundation in support of Chemistry
 - \$100K from the Rider family and Children's Brain Diseases Foundation for Research
 - \$100K from Scott Gray, Duane Minix and Wade Knight for SMU Human Rights Program
 - \$100K from SMU parents Kimberly and John Kirtley from Tampa, Florida, to support Dedman College scholars
- Ms. Kleinert concluded by sharing Dedman College's fundraising priorities: The Fund for Faculty and Research success; the Dedman College Scholars Program; and the Human Rights Program Endowment.

Mr. David Huntley provided the Dedman School of Law Campaign Steering Committee update:

- Mr. Huntley said since launching the Dedman Law Centennial Scholarship Challenge in April of 2024, the school has secured over \$1.8M, bringing a total impact of \$3.4M for scholarships at the law school, including the 1:1 match.
- Mr. Huntley said for the last eight months, we have been working with the architecture firm SLAM to conduct a feasibility study, a programming study, and design implementation to usher in a new era of instruction via a comprehensive renovation to the law quad.
- The law school is hosting the second year of the Trailblazer Speaker Series featuring guest speakers such as Don Godwin, Bob Rowling, Judge Irma Ramirez, and more.
- For the fourth year in a row, Dedman Law has recruited and retained the highest credentialed class in the history of the law school, boasting a median LSAT score of 166 and a median GPA of 3.86.
- Mr. Huntley shared over Homecoming weekend, we successfully executed both the law school reunion and our tailgate which totaled over 1,000 alumni and family attendees.
- Mr. Huntley then shared a list of upcoming events:
 - In January of 2025, the law school will host NPR's Nina Totenburg who has skillfully covered the United States Supreme Court for decades.
 - In February, we will celebrate the centennial of the law school over a two-day celebration. More details will be announced in December and early 2025.
 - In March of 2025, we will continue our tradition of swearing in a new slate of our Dedman Law alumni before the United States Supreme Court.
 - In April, we will conduct our Campaign Steering Committee meeting as well as our Executive Board meeting, featuring the latest updates to the law quad renovation.
- Mr. Huntley concluded by stating the two Dedman School of Law fundraising priorities are the Law Quad Renovation and the Dedman Law Centennial Scholarship Challenge.

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- Dr. Lyle began by sharing Lyle's campaign priorities, such as:
 - Research Space and Undergraduate Laboratory Renovation
 - PhD Scholarships and Fellowships
 - Undergraduate Excellence Funds
 - Faculty Endowed Positions
- Dr. Lyle then shared some recent gifts:
 - \$100K from Mrs. Mary Ellen Simmons and Mr. Thomas E. Simmons

- \$100K from Mrs. Caren Stacy and Mr. Wayne Stacy '95, to support the Lyle Thrive Scholars program
- \$500K from an anonymous donor towards scholarships in the Masters of Datacenter Systems Engineering Program
- \$1.5M from Mrs. Paula Rhines and Dr. Walden Rhines, PhD. '75, to the PhD Fellowship in Electrical and Computer Engineering or Computer science
- Dr. Lyle mentioned some achievements and recent activities for the Lyle School:
 - The establishment of the Center for Digital and Human-Augmented Manufacturing (CDHAM)
 - An Energy and Battery faculty cluster hire, including a National Academy of Engineering (NAE) member, Dr. Ali Dogru
 - Lyle Endowed Faculty Dinner
 - Lyle Alumni Homecoming Mixer

Ms. Jennifer Altabef provided the Meadows School of the Arts Campaign Steering Committee update:

- Ms. Altabef began her report by providing an update on fundraising and highlighting select new principal and major gifts:
 - \$3.7M in additional support for the Meadows Museum endowment from the estate of Anne R. Bromberg
 - A \$1.8M planned gift from Linda Gardner and Fred Alsup to endow a postdoctoral fellowship and Senior Curator position at the Meadows Museum
 - \$1M from Gayle Stoffel for the Gayle and Paul Stoffel Endowed Meadows Scholar Fund
- Ms. Altabef then shared the Meadows School's top fundraising priorities:
 - Scholarships
 - The Endowment of faculty chairs and academic divisions
 - Select renovation projects (Corporate Communications and Public Affairs spaces; Bob Hope Theatre; and the South entrance of the SMU Fine Arts Complex).
- Ms. Altabef then mentioned recent activities and events, such as Music Composition and Theory professor Xi Wang being awarded the 2024 Guggenheim Fellowship, Jen Benoit-Bryan being named the new director of SMU DataArts, and Meadows Dean Sam Holland being awarded the Obelisk Award from the Business Council for the Arts.
- Ms. Altabef concluded her report by sharing three upcoming events. First, *The Legacy of Vesuvius: Bourbon Discoveries on the Bay of Naples* will be at the Meadows Museum through January 5, 2025. *Sweeny Todd* will be performed by the Meadows Lyric Theatre from March 6-9, 2025. Finally, the Meadows at the Meyerson benefit concert, honoring Gayle Stoffel, will occur on Monday, April 28.

Mr. Joe Hardt provided the Perkins School of Theology Campaign Steering Committee update:

- Mr. Hardt highlighted some partnerships and their recent gifts:
 - The General Board of Higher Education & Ministry of the UMC (GBHEM) gave \$8M to Perkins
 - The Highland Park United Methodist Church is finishing its \$1M pledge to endow a professor of Methodist History honoring Umphrey Lee
- Mr. Hardt also shared Perkins was recently notified of a \$2.5M grant award from the Lilly Endowment to benefit Bridwell Library
- Mr. Hardt then shared some significant gifts and funding initiatives, noting that Perkins Campaign donations total approximately \$34M, of which 62% is for Operating support, 25% for Endowment, and 13% for Capital Projects:

- Eula Mae and John Baugh Foundation: Baptist House of Studies, Scholarships
 - Montfort Jones & Allie B. Jones Foundation: Scholarships
 - Oklahoma Methodist Foundation: Scholarships, Student Support
 - UMC General Board of Higher Education and Ministry (GBHEM): Scholarships and Support
 - The Perkins Scholars program, benefiting the top 10 students each school year, is fully funded through FY27
 - Funding to remodel and update Kirby Parlor near the Dean's office continues
 - An anonymous donor has pledged to fund a new Piano for Perkins Chapel, which completes the chapel's renovation
- Mr. Hardt also stated two major proposals have recently been submitted to grant agencies totaling \$4.3M, which he expects will be reported to the Committee at the May meeting.
 - Mr. Hardt then shared information about a recent, successful Fall Convocation, entitled "Faith in a Digital Age." This topic fits in with the University's drive to familiarize students and faculty members with the possibilities Artificial Intelligence can bring to education, and more specifically, theological education.
 - Mr. Hardt concluded by sharing two upcoming events. The first, the Faith and Business Luncheon Series this spring, will feature Mr. Cullum Clark in February, and SMU Football Head Coach Rhett Lashlee in April. The annual Perkins Scholarship Luncheon – the Judy and Jim Gibbs Public Life Personal Faith Luncheon – will be held on March 17, and will feature Ms. Cynt Marshall, retiring President and CEO of the Dallas Mavericks.

Ms. Connie O'Neill provided the Simmons School of Education Campaign Steering Committee update:

- Ms. O'Neill began by stating Simmons has built strong momentum coming out of the summer months and continues to serve as a key driver of impact at SMU and in the North Texas community
- Ms. O'Neill then shared Simmons has Expanded Teach for America (TFA) partnerships, now serving Dallas-Fort Worth, Austin, San Antonio, and Austin. Simmons now serves as the educator preparation provider for TFA, offering robust certification programs for 80-120 new corps members across these regions. These partnerships were strengthened to impact teacher certification and teacher preparation across Texas.
- The Simmons School provides scholarships strategically throughout the year to advance the careers of dedicated educators:
 - Dallas ISD Scholarships: 16 teachers received prestigious scholarships to pursue Master's degrees at SMU Simmons
 - Simmons Scholarships: 8 additional teachers were awarded scholarships, specializing in Special Education and STEM
 - Bishop Scholarships: 8 teachers received Kathryne and Gene Bishop Scholarships, focused on Special Education and Bilingual Education/ESL
- Ms. O'Neill then updated the Committee on Simmons' recent fundraising highlights:
 - A \$5M planned gift from an anonymous donor to support Simmons scholarships
 - A \$3.5M gift from The Addy Foundation to endow the Center on Research and Evaluation (CORE)
 - A \$300K gift from an anonymous donor to support Simmons scholarships
 - A grant from H-E-B, supporting the West Dallas STEM School's learning garden and teachers' lounge
- Ms. O'Neill stated two key approaches the Simmons School would focus on to effectively support students:
 - Support for the Simmons Scholars Fund: these funds provide funding for Simmons students across the board. Examples include expanding our need-based scholarships for graduate students who are

pursuing degrees in T&L and EPL. Many of these students are already active educators and leaders in their schools and communities, balancing full-time work with their studies, and financial support is vital to helping them succeed.

- Endowed Scholarship Funding: this is an excellent option for donors who have a specific passion for a particular area of education. Whether it's supporting future principals through the EPL program or helping teachers advance their expertise in the classroom through the T&L program, we can work with donors to create personalized plans that make the greatest impact in the areas they care about most.
- Ms. O'Neill concluded her report by sharing details of the Simmons *Ignited* Celebration Lunch, occurring on March 5, 2025. The lunch will celebrate donors who have contributed \$1M or more to Simmons since the start of the *Ignited* Campaign.

Mr. Bruce Robson provided the Athletics Campaign Steering Committee update:

- Mr. Robson mentioned three fundraising priorities: the ACC Competitiveness Fund, the Weber End Zone Complex, and the beginning of Revenue Sharing
 - ACC Competitiveness Fund: after attaining the initial fundraising goal of \$125M for the ACC Competitiveness Campaign, SMU has experienced one of its most successful fall sports seasons on record
 - Weber End Zone Complex: At \$86M toward the \$100M fundraising goal, the need for support is crucial, and there are several high-profile naming opportunities available.
 - Revenue Sharing: Following the House v. NCAA lawsuit, and the corresponding settlement, athletic departments will be able to pay student-athletes up to a total of \$22M per year beginning July 2025.
- Mr. Robson then shared some recent accomplishments:
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 - A record 5,127 Mustang Club members
 - SMU was a two-time host to the ACC Huddle pre-game show
 - First back-to-back sellouts in Ford Stadium history
 - Three programs in the national top 20 rankings, including two programs in the national top 10
 - An average of over 250 attendees at away game tailgates
- To conclude, Mr. Robson highlighted the December 17th ACC Championship Game in Charlotte as well as Men's Basketball's ACC debut versus Virginia on December 7th.

Mr. Cheves provided an update on SMU-in-Taos, SMU Libraries, and Student Affairs.

- New gifts to Cheer and Pom, a new trailer for Peruna, and the raising of funds for new Mustang Band uniforms were highlighted.
- SMU-in-Taos held a successful July Cultural Institute. SMU-in-Taos has raised \$750K to complete the dining hall renovation.
- SMU will host the next SMU-in-Taos Cultural Institute, July 17-20, 2025.
- Mr. Cheves then shared two upcoming Library events:
 - December 10: Friends of SMU Libraries annual holiday luncheon at Royal Oaks Country Club
 - March 29: Friends of the SMU Libraries annual Tables of Content fundraiser in the Jones Atrium within the Owen Arts Center
- Mr. Cheves highlighted upcoming campaign events, including:
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 - March 5: Simmons Campaign Donor Event
 - March 11: SMU Giving Day

- April 28: Meadows at the Meyerson
- May 1: The Groundbreaking of the Rees-Jones Library of the American West
- July 17-20: Taos Cultural Institute

Mr. Miller then gave the floor to Dr. Turner to provide campaign results.

- Dr. Turner announced the campaign total: \$1,387,843,320, representing 93% of the entire fundraising goal of \$1.5B.
- Dr. Turner said when the Committee last met in May, anticipation was high for all the good things that could happen in the following six months: joining the ACC, dedicating the Miller Quadrangle and the Weber End Zone Complex, and so many other exciting announcements in the areas of scholarship support, academic support, and athletic support. But, none of us anticipated this level of increased visibility, rising application numbers, and renewed pride, that together, we are experiencing. In looking back, this has capped a 30-year span of increasing momentum and accomplishment, largely due to your efforts and those of your fellow Mustangs.
- Dr. Turner concluded his report by sharing a video that was shown to donors at the campaign donor event on Homecoming weekend.

With no further business, the meeting was adjourned by Mr. Miller.

**Meeting of the Campaign Executive Committee
May 1, 2025, 9:30 am, Mack Grand Ballroom**

MEETING MINUTES

At 9:30 am, Mr. David Miller called the meeting to order.

- Mr. Miller welcomed the Committee members to the twelfth and final meeting of the Campaign Executive Committee, the seventh since the launch of the *Ignited* campaign.
- Mr. Miller stated the Campaign Executive Committee was composed of members of the Campaign Leadership Council, seated to his left and right, along with the co-chairs of the Campaign Steering Committees, seated around the open table.
- Mr. Miller noted the others present: the President's Executive Council, academic deans, and the Vice Provost for Research and Chief Innovation Officer.
- Mr. Miller recognized the Development and External Affairs staff leadership as well as the Directors of Development. Mr. Miller also welcomed campaign consultant Mr. Bob Sweeney.

Mr. Miller gave the floor to Dr. Turner for the President's report.

- Dr. Turner said our move to the ACC continues to draw enthusiasm and financial support, and we're seeing more and more the impact of the Campaign in areas all across campus.
- Dr. Turner then announced the new principal gifts since the CEC meeting in May, which he reported to the Board at their September meeting:

| Donor | Purpose |
|--|---|
| Anita Ray Arnold and Truman Arnold | Cox School Renovation and Expansion Fund |
| Arnold Ventures (Laura and John Arnold Foundation) | The Deason Criminal Justice Reform Center |

| | |
|---|---|
| Estate of Anne R. Bromberg | Dedman School of Law Endowed Support |
| Matthew H. Fleegeer '87 and Valerie "Candee" Fleegeer '86, '90 and the Fleegeer Family Foundation | ACC Competitiveness Campaign Garry Weber End Zone Complex |
| Linda L. Gardner and W. Fred Alsup | The Linda Gardner and Fred Alsup Endowed Senior Curator Fund The Linda Gardner and Fred Alsup Endowed Fellowship for Research in Spanish Art |
| Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65 | The Nancy Ann and Ray L. Hunt Leadership Scholars Program Endowment Fund |
| Jeremy M. Lacy '96 | The Jeremy M. Lacy Endowed Mustang Athletic Fund The Jeremy M. Lacy Endowed Scholarship Fund |
| Jodi K. Pratt and Kenneth W. Pratt | Basketball Capital Improvements |
| Karen Johnson Scharbauer '74 | ACC Competitiveness Campaign |
| Sarah A. Scharbauer '03 | ACC Competitiveness Campaign |
| Kim M. Shaddock and William C. Shaddock '74 | Garry Weber End Zone Complex |
| Robert G. Skinner | General University Unrestricted Support |
| Gayle Stoffel | Gayle and Paul Stoffel Endowed Meadows Scholar Fund |
| Laurie-Leigh Nix White '07, '08 and Charles E. White, III | Cox School of Business Support Mustang Athletic Fund |

- Dr. Turner then shared the list of new Principal Gifts, which he said he would report to the Board at their meeting tomorrow:

| Donor | Purpose |
|---|---|
| Anonymous | Cheer/Pom Operational Support, Conditional Challenge Pledge |
| Lydia and Bill Addy and The Addy Foundation | The Addy Center on Research and Evaluation |
| Dallas Institute of Humanities and Culture | New Humanities Institute in Dedman College |
| Hamon Charitable Foundation | Hamon STEM Education Programs Hamon Thrive Scholars Fund |
| Estate of Carolyn Vestal Kelly '67, '83 | General University Endowment |
| Amy B. Korenvaes and Harlan B. Korenvaes | President's Discretionary Fund |
| Jan and Trevor D. Rees-Jones '78 | The Rees-Jones Library of the American West Acquisition Fund |
| The Rhines Foundation – Mrs. Paula H. Rhines and Dr. Walden C. Rhines | The Rhines Ph.D. Fellowship |

- Dr. Turner then mentioned exciting events and announcements since the Committee last convened:
 - The day after the May CEC meeting, SMU dedicated the David B. Miller Business Quadrangle and recognized donors to the project.
 - The SMU-in-Taos Cultural Institute in July was very well attended and created enthusiasm around new campus development.

- SMU dedicated the Garry Weber End Zone Complex, thanks to significant contributions from Garry Weber, the Armstrongs, and many others.
- We dedicated the new organ in Perkins Chapel in honor and memory of Caren and Vin Prothro.
- Finally, SMU held an event at Cox honoring Campaign donors to the School, which provided an opportunity for those major donors to tour the new facilities within the Miller Quadrangle.
- Dr. Turner then gave the floor to Brad Cheves for the Campaign Steering Committee updates.

Ms. Jeanne Phillips provided the National Steering Committee update:

- Ms. Phillips reminded the Committee the purpose of the National Campaign Committee: to build, strengthen, and engage the national and international SMU alumni, parents, and friends network through in-person and regional engagement methods.
- Ms. Phillips recognized the Co-Chairs of the National Campaign Committee:
 - Scott McLean, Co-Chair
 - Marty Flanagan, Co-Chair
 - Richard Ware, Co-Chair
 - Ed Wilson, Co-Chair
- Ms. Phillips shared some recent gifts, including:
 - A \$1.2M planned gift from Robert Skinner in Florida
 - A \$400K pledge to the Small Town and Rural Students (STARS) College Network Fund, from Trott Family Philanthropies in Chicago
 - A \$272K pledge from Paula and Kathleen Flather to the Flather Family Endowment in California
- Ms. Phillips mentioned recent National events, such as:
 - Gatherings at away ACC football games
 - Louisville: private reception at the home of Ceci and Dale Boden
 - Stanford: private reception at the St. Regis, as well as an alumni tailgate with over 700 Mustang fans in attendance
 - Duke: Partnership with Anthony Travel resulting in a sold-out travel package for our supporters traveling to Durham
 - Virginia: private reception on Friday night hosted by Suzanne Youngkin

Mr. Tucker Bridwell provided the Cox School of Business Campaign Steering Committee update:

- Mr. Bridwell reported the David B. Miller Business Quadrangle opened for classes in August 2024.
- Mr. Bridwell said the Cox School of Business hosted Cox MS and MBA reunions on homecoming weekend in the new Quadrangle.
- The Cox Distinguished Alumni Awards event will be taking place Spring of 2025.
- Mr. Bridwell mentioned the Cox fundraising priorities as:
 - MBA Scholarships
 - BBA Scholarships
 - Faculty positions and academic programs

Ms. Ashlee Kleinert provided the Dedman College Campaign Steering Committee update:

- Ms. Kleinert shared the Dedman College Scholars Program currently supports 94 students. In fall 2024, 26 new students joined SMU solely because of these scholarships.
- Dedman College committed \$3.5M in startup funding for 17 new tenure-track faculty hired in 2024. Additionally, 13 tenure-track faculty searches are underway for the next academic year.
- Ms. Kleinert shared faculty achievements in the last six months, including:
 - Nicolay Tsarvesky, Associate Professor named American Chemistry Society fellow
 - Zhong Lu, Shuler-Foscue Chair in Earth Sciences named American Geophysical Union fellow
 - Andrea Laurent Simpson, Lecturer in Sociology: Distinguished Book Award from the American Sociological Association
- The Dallas Institute of Humanities and Culture has joined Dedman College, transferring assets worth approximately \$12M, including its endowment and operational funding, as well as proceeds from the sale of its headquarters.
- Ms. Kleinert shared recent gifts, including:
 - \$400K from ISEM Inc. to support fellows in Anthropology and Earth Sciences
 - \$180K from The Perot Foundation for Center for Presidential History
 - \$150K from Betty Regard for SMU Human Rights Program
 - \$100K from The Welch Foundation in support of Chemistry
 - \$100K from the Rider family and Children's Brain Diseases Foundation for Research
 - \$100K from Scott Gray, Duane Minix and Wade Knight for SMU Human Rights Program
 - \$100K from SMU parents Kimberly and John Kirtley from Tampa, Florida, to support Dedman College scholars
- Ms. Kleinert concluded by sharing Dedman College's fundraising priorities: The Fund for Faculty and Research success; the Dedman College Scholars Program; and the Human Rights Program Endowment.

Mr. David Huntley provided the Dedman School of Law Campaign Steering Committee update:

- Mr. Huntley said since launching the Dedman Law Centennial Scholarship Challenge in April of 2024, the school has secured over \$1.8M, bringing a total impact of \$3.4M for scholarships at the law school, including the 1:1 match.
- Mr. Huntley said for the last eight months, we have been working with the architecture firm SLAM to conduct a feasibility study, a programming study, and design implementation to usher in a new era of instruction via a comprehensive renovation to the law quad.
- The law school is hosting the second year of the Trailblazer Speaker Series featuring guest speakers such as Don Godwin, Bob Rowling, Judge Irma Ramirez, and more.
- For the fourth year in a row, Dedman Law has recruited and retained the highest credentialed class in the history of the law school, boasting a median LSAT score of 166 and a median GPA of 3.86.
- Mr. Huntley shared over Homecoming weekend, we successfully executed both the law school reunion and our tailgate which totaled over 1,000 alumni and family attendees.
- Mr. Huntley then shared a list of upcoming events:
 - In January of 2025, the law school will host NPR's Nina Totenburg who has skillfully covered the United States Supreme Court for decades.

- In February, we will celebrate the centennial of the law school over a two-day celebration. More details will be announced in December and early 2025.
 - In March of 2025, we will continue our tradition of swearing in a new slate of our Dedman Law alumni before the United States Supreme Court.
 - In April, we will conduct our Campaign Steering Committee meeting as well as our Executive Board meeting, featuring the latest updates to the law quad renovation.
- Mr. Huntley concluded by stating the two Dedman School of Law fundraising priorities are the Law Quad Renovation and the Dedman Law Centennial Scholarship Challenge.

Dr. Bobby Lyle provided the Lyle School of Engineering Campaign Steering Committee update:

- Dr. Lyle began by sharing Lyle’s campaign priorities, such as:
 - Research Space and Undergraduate Laboratory Renovation
 - PhD Scholarships and Fellowships
 - Undergraduate Excellence Funds
 - Faculty Endowed Positions
- Dr. Lyle then shared some recent gifts:
 - \$100K from Mrs. Mary Ellen Simmons and Mr. Thomas E. Simmons
 - \$100K from Mrs. Caren Stacy and Mr. Wayne Stacy ’95, to support the Lyle Thrive Scholars program
 - \$500K from an anonymous donor towards scholarships in the Masters of Datacenter Systems Engineering Program
 - \$1.5M from Mrs. Paula Rhines and Dr. Walden Rhines, PhD. ’75, to the PhD Fellowship in Electrical and Computer Engineering or Computer science
- Dr. Lyle mentioned some achievements and recent activities for the Lyle School:
 - The establishment of the Center for Digital and Human-Augmented Manufacturing (CDHAM)
 - An Energy and Battery faculty cluster hire, including a National Academy of Engineering (NAE) member, Dr. Ali Dogru
 - Lyle Endowed Faculty Dinner
 - Lyle Alumni Homecoming Mixer

Ms. Jennifer Altabef provided the Meadows School of the Arts Campaign Steering Committee update:

- Ms. Altabef began her report by providing an update on fundraising and highlighting select new principal and major gifts:
 - \$3.7M in additional support for the Meadows Museum endowment from the estate of Anne R. Bromberg
 - A \$1.8M planned gift from Linda Gardner and Fred Alsup to endow a postdoctoral fellowship and Senior Curator position at the Meadows Museum
 - \$1M from Gayle Stoffel for the Gayle and Paul Stoffel Endowed Meadows Scholar Fund
- Ms. Altabef then shared the Meadows School’s top fundraising priorities:
 - Scholarships
 - The Endowment of faculty chairs and academic divisions
 - Select renovation projects (Corporate Communications and Public Affairs spaces; Bob Hope Theatre; and the South entrance of the SMU Fine Arts Complex).
- Ms. Altabef then mentioned recent activities and events, such as Music Composition and Theory professor Xi Wang being awarded the 2024 Guggenheim Fellowship, Jen Benoit-Bryan being named the new

director of SMU DataArts, and Meadows Dean Sam Holland being awarded the Obelisk Award from the Business Council for the Arts.

- Ms. Altabef concluded her report by sharing three upcoming events. First, *The Legacy of Vesuvius: Bourbon Discoveries on the Bay of Naples* will be at the Meadows Museum through January 5, 2025. *Sweeny Todd* will be performed by the Meadows Lyric Theatre from March 6-9, 2025. Finally, the Meadows at the Meyerson benefit concert, honoring Gayle Stoffel, will occur on Monday, April 28.

Mr. Joe Hardt provided the Perkins School of Theology Campaign Steering Committee update:

- Mr. Hardt highlighted some partnerships and their recent gifts:
 - The General Board of Higher Education & Ministry of the UMC (GBHEM) gave \$8M to Perkins
 - The Highland Park United Methodist Church is finishing its \$1M pledge to endow a professor of Methodist History honoring Umphrey Lee
- Mr. Hardt also shared Perkins was recently notified of a \$2.5M grant award from the Lilly Endowment to benefit Bridwell Library
- Mr. Hardt then shared some significant gifts and funding initiatives, noting that Perkins Campaign donations total approximately \$34M, of which 62% is for Operating support, 25% for Endowment, and 13% for Capital Projects:
 - Eula Mae and John Baugh Foundation: Baptist House of Studies, Scholarships
 - Montfort Jones & Allie B. Jones Foundation: Scholarships
 - Oklahoma Methodist Foundation: Scholarships, Student Support
 - UMC General Board of Higher Education and Ministry (GBHEM): Scholarships and Support
 - The Perkins Scholars program, benefiting the top 10 students each school year, is fully funded through FY27
 - Funding to remodel and update Kirby Parlor near the Dean's office continues
 - An anonymous donor has pledged to fund a new Piano for Perkins Chapel, which completes the chapel's renovation
- Mr. Hardt also stated two major proposals have recently been submitted to grant agencies totaling \$4.3M, which he expects will be reported to the Committee at the May meeting.
- Mr. Hardt then shared information about a recent, successful Fall Convocation, entitled "Faith in a Digital Age." This topic fits in with the University's drive to familiarize students and faculty members with the possibilities Artificial Intelligence can bring to education, and more specifically, theological education.
- Mr. Hardt concluded by sharing two upcoming events. The first, the Faith and Business Luncheon Series this spring, will feature Mr. Cullum Clark in February, and SMU Football Head Coach Rhett Lashlee in April. The annual Perkins Scholarship Luncheon – the Judy and Jim Gibbs Public Life Personal Faith Luncheon – will be held on March 17, and will feature Ms. Cynt Marshall, retiring President and CEO of the Dallas Mavericks.

Ms. Connie O'Neill provided the Simmons School of Education Campaign Steering Committee update:

- Ms. O'Neill began by stating Simmons has built strong momentum coming out of the summer months and continues to serve as a key driver of impact at SMU and in the North Texas community
- Ms. O'Neill then shared Simmons has Expanded Teach for America (TFA) partnerships, now serving Dallas-Fort Worth, Austin, San Antonio, and Austin. Simmons now serves as the educator preparation provider for TFA, offering robust certification programs for 80-120 new corps members across these regions. These partnerships were strengthened to impact teacher certification and teacher preparation across Texas.

- The Simmons School provides scholarships strategically throughout the year to advance the careers of dedicated educators:
 - Dallas ISD Scholarships: 16 teachers received prestigious scholarships to pursue Master's degrees at SMU Simmons
 - Simmons Scholarships: 8 additional teachers were awarded scholarships, specializing in Special Education and STEM
 - Bishop Scholarships: 8 teachers received Kathryne and Gene Bishop Scholarships, focused on Special Education and Bilingual Education/ESL
- Ms. O'Neill then updated the Committee on Simmons' recent fundraising highlights:
 - A \$5M planned gift from an anonymous donor to support Simmons scholarships
 - A \$3.5M gift from The Addy Foundation to endow the Center on Research and Evaluation (CORE)
 - A \$300K gift from an anonymous donor to support Simmons scholarships
 - A grant from H-E-B, supporting the West Dallas STEM School's learning garden and teachers' lounge
- Ms. O'Neill stated two key approaches the Simmons School would focus on to effectively support students:
 - Support for the Simmons Scholars Fund: these funds provide funding for Simmons students across the board. Examples include expanding our need-based scholarships for graduate students who are pursuing degrees in T&L and EPL. Many of these students are already active educators and leaders in their schools and communities, balancing full-time work with their studies, and financial support is vital to helping them succeed.
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DEA Staff Leadership 2024-25

| Staff Member | Responsibilities |
|--|--|
| <u>Annual Giving and Alumni Relations</u> Ms. Astria Smith Vice President | <ul style="list-style-type: none"> • Annual Giving Programs • Annual Giving Direct Marketing • Alumni Relations and Engagement • Leadership Gifts |
| <u>Development Services</u> Mr. Chris Kollar Associate Vice President | <ul style="list-style-type: none"> • Development Management Systems • Records & Gift Administration • Development Research • Prospect Management |
| <u>Marketing and Communications</u> Ms. Regina Moldovan Vice President | <ul style="list-style-type: none"> • Public Affairs • News & Communications • Integrated Marketing |
| <u>Principal and Major Gifts</u> Mr. Blake B. Davis Vice President | <ul style="list-style-type: none"> • Principal Gifts • Major Gifts • Gift Planning • Corporate & Foundation Relations |
| <u>Program Services and Donor Relations</u> Ms. Dana Wilcox Ayres Associate Vice President | <ul style="list-style-type: none"> • University Events • Lecture Programs • Donor Relations • Academic Ceremonies |
| <u>School and Project Development</u> Ms. Paula Jewell Vice President | <ul style="list-style-type: none"> • Athletics Development • School Development • Unit Development |
| <u>Office of the Senior Vice President</u> Mr. Robert Buckner Assistant to the SVP DEA for Strategic Affairs | <ul style="list-style-type: none"> • Strategic Planning • Special Projects • Board Committee Support • Campaign Management |

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DEVELOPMENT AND EXTERNAL AFFAIRS

Brad E. Cheves
Senior Vice President
for Development and External Affairs

MARKETING AND COMMUNICATIONS

Regina Moldovan
Vice President for Marketing and Communications

| | |
|---|--|
| Emily Hughes Armour Executive Director Creative Marketing | Karen Hart Assistant to the Vice President Marketing and Communications |
| Logan Edwards Creative Director Alumni and Editorial | Neil Robinson Executive Director Planning and Development Marketing |
| Kreyton Polka Senior Designer | Jamie Abbott Director Planning Operations |
| Vacant - 00036861 Designer | Rachelle Robinson Project Manager |
| Sarah Bennett Writer/Editor | Gina Wang Producer and Project Manager |
| Madison Ford Communications Specialist | Jessica Norris Project Manager |
| John May Creative Director Development Communications | Katy Scott Director, Project Management |
| Alexis Olajay Production Designer | Megan Jacob Director Media and Community Relations |
| Amanda Upton Lead Writer Campaign Communications and Development | Wendelin Donahue Director, Community Engagement |
| Katherine Hill Writer Communications and Development | Nancy George Associate Director Media Relations |
| Georgette Taylor Copy Editor/Writer | Monifa Thomas-Nguyen Media Relations Manager |
| Laura Graham Director Photo and Video | Stephen Fasoro Media Relations Manager |
| Vacant - 00050547 Senior Photographer | Bob Ehler Commentary Editor |
| Garrett Holton Senior Videographer | Erin Prather Stafford Media Relations Manager |
| Megan Gellner Assistant Director Photo and Video | Anthony de Bruyn Director Strategic Communications |
| Bohao Zhao Executive Director Digital Marketing | Greg Ramirez Director, Internal Communications |
| Liana Dobbs Associate Director Social Media | Erica Lee Associate Director University Communications |
| Vacant - 00050784 Social Media Manager | Gary O'berg Associate Director AV Production |
| Jesse Hopkins Analytics Manager | Crescencio Cantu Associate Director Digital Marketing |
| Joanna England Content Marketing Manager | CJ Rosenbower Senior Web Specialist |
| Andy Odom SEO Manager | |
| Van Pham Marketing Automation Manager | |

PRINCIPAL AND MAJOR GIFTS

Blake Davis
Vice President for Principal and Major Gifts

| | |
|--|--|
| Tim Aronson Executive Director Gift Planning | Rachel Ryan Assistant to the Vice President Principal and Major Gifts |
| Teresa Thornburg Development Specialist | Rob Strauss Senior Director Corporate and Foundation Relations |
| Katy Miller Merriman Director Gift Planning | Timothy Angell Director Corporate Engagement |
| Eric Robinson Director Major Gifts | Lesley Marshall Assistant Director Grant Writer |
| Molly Fauzio Major Gifts Officer | Ann Fielder Philanthropic Advisor |
| Sally Rychlak Major Gifts Officer | Mark Dini Executive Director Principal Gifts |
| Kristyn Fultz Major Gifts Officer | |
| Sarah Staats Major Gifts Officer | |
| Brad Marley Major Gifts Officer | |
| Vacant - 00052827 Major Gifts Officer | |
| Elise Nutt Major Gifts Coordinator | |

SCHOOL AND PROJECT DEVELOPMENT

Paula Jewell
Vice President for School and Project Development

| | |
|--|---|
| Joshua Whittenburg Associate Athletics Director for Development | Gina Bratcher Assistant to the Vice President for School and Project Development |
| Kayla Treadwell Athletics Development Assistant | Brandon Starr Director of Development for University Programs |
| Bob Sharp Senior Director of Major Gifts | Vacant - 00054829 Director of Development for General University |
| Da'Ron Brown Assistant Athletics Director, Major Gifts | Carolina Garza Advancement Associate |
| Kirsten Brown Assistant Athletics Director Development | Ashley Pitts Director of Development for Cox |
| Jordan Mack Associate Director Development | Elena Trammell Advancement Coordinator |
| Jake Yurachek Associate Director Development | Shivangi Perkins Director of Development for Dedman College |
| Vacant - 00055012 Coordinator | Vacant - 00052863 Advancement Associate |
| Annie Mayberry Director Athletics Development Operations | Clayton Ellis Director of Development for Dedman Law |
| Lizzie Dumas Assistant Director Development Operations | Avery Lupton Advancement Associate |
| Abdoul Kouyate Assistant Director Development | Maya Jhangiani Director of Development for Lyle |
| | Meredith Bathie Advancement Associate |
| | Nick Weege Director of Development for Meadows |
| | Chris Murphy Advancement Associate |
| | John Martin Director of Development for Perkins |
| | Rose Burns Advancement Associate |
| Jeffrey King Director of Development for Simmons | |
| Sarah Simmons Advancement Associate | |

ANNUAL GIVING AND ALUMNI RELATIONS

Astria Smith
Vice President for Annual Giving and Alumni Relations

| | |
|---|--|
| Daniel Suda Sr. Director Alumni and Mustang Engagement | Elizabeth Gallegos Coordinator |
| Molly Bishop Assistant Director Student/Young Alumni Engagement | Nicole Sprowl Director, Leadership Annual Giving |
| Caleb Almond Assistant Director Affinity Groups | Vacant - 00053111 Advancement Associate |
| Jennifer Watson Events and Board Relations Manager | Nichola Racey Digital Engagement Officer |
| Amy Thompson Senior Assistant Director Parent and Volunteer Engagement | Ethan Gillis Digital Engagement Officer |
| Alyssa Lockley Assistant Director Class Giving and Engagement | Vacant - 00051082 Leadership Gifts Officer |
| Thomas Brady Assistant Director Class Giving and Engagement | Susan Watkins Director Direct Marketing |
| Jen Coraluzzi Alumni Relations | Megan Litke - Luchini Assistant Director Direct Marketing Solicitations |
| DaNaysia Jones Assistant Director Regional Networks | Peter Kostos Assistant Director Direct Marketing Communication |
| Jeanine Vargas Assistant Director Signature Programs | Vacant - 00052817 Assistant Director, Digital Marketing |
| Cherlyn Haynes Senior Events Manager | Vacant - 00054081 Associate Director AGAR Marketing Projects |
| Lily Charnes Administrative Creative Connections | Vacant - 00050653 Director, Annual Giving Planning and Strategy |
| | Kenneth Williams Department Senior Business Systems Analyst |

DEVELOPMENT SERVICES

Chris Kollar
Associate Vice President for Development Services

| | |
|--|---|
| Heather Sargent Coordinator | Libby Wharton Project Manager |
| Vacant - 00054028 Director Advancement Analytics | Vacant - 00055104 SalesForce Marketing Cloud Administrator |
| Scott Ruff Department Business Systems Senior Analyst | Brennan Hadden Director AATS |
| Rob Lane Department Business Systems Associate | Lindsay Glass Technology Support Specialist |
| Vacant - 00049856 Director Development Systems | Blair Van Horn Technology Support Specialist Events |
| Diane Kucera Director Records and Gift Administration | Vacant - 00053157 Integrations and Applications Developer |
| Jared Calkins Assistant Director Financial Controls | Vacant - 00053114 Senior Developer |
| Rene Reid Quality Assurance Specialist | Chris Kowalske Senior Developer |
| Janet Asberry Assistant Director Constituent Records | Vacant - 00051612 Director, Prospect Development |
| Alicia Jones Data Integration Specialist | Rachel Seay Assistant Director Prospect Management |
| Alex Estrada Senior Records Specialist | Mason Bratcher Prospect Management Analyst |
| Robert Martin Senior Records Specialist | Sara Cucinotti Assistant Director Development Research |
| Dianna Zaragoza Senior Records Specialist | Janey Rodriguez Researcher Special Projects |
| Claire Parry Records Specialist | Brianna Lucido Advancement Researcher |
| Ailine Dominey Records Specialist | Sylvie Wilson Advancement Researcher |
| Nayoskee Parker-Becker Associate Director Gift Processing | Andrea Hogg Advancement Researcher |
| Britt Guild Senior Gift Specialist | |
| Vacant - 00053059 Senior Gift Analyst | |
| Gielle Fuselier Gift Specialist | |
| Kevin McClelland Gift Specialist | |
| | Alex Leever Associate Director Academic Ceremonies |

PROGRAM SERVICES AND DONOR RELATIONS

Dana Ayres
Associate Vice President for Program Services and Donor Relations

| | |
|---|--|
| John Saltzgriver DEA Operations Manager | Michelle Baehl CIQ Officer and Director Staff Development |
| Carla Scott Jones Director Special Events | Mac Andrews Project Specialist for Strategic Affairs |
| Briana Frazier Assistant Director Special Events | Heather Shaw Assistant to the Senior Vice President for Leadership Projects |
| Beth Bone Assistant Director Special Events | Michele Andrews Senior External Relations Specialist |
| Ana Ablanedo Morales Event Assistant | Martha Mendez Executive Assistant to the Senior Vice President |
| Mary Kate Carson Event Assistant Special Programs | Cheba Nugent DEA Process Specialist |
| Jeff Lockhart Director, Lectures and Public Programs | Bonnie Bazley Volunteer and Process Specialist |
| Kelsey Lang Assistant Director Lectures and Public Programs | |
| Colin Hayes Assistant Director Communications | |
| Imani Johnson Event Assistant | |
| Aaron D'Eramo Manager Ticketing, Boards and Sponsorships | |
| Carey Garrett Director Donor Relations and Stewardship | |
| Carrie Marquis Assistant Director Donor Relations Stewardship | |
| Ryan Garrett Assistant Director Recognition and Communications | |
| Jenna Hammer Assistant Director Donor Relations Endowment Reporting | |
| Vacant - 00051560 Assistant Director Donor Relations Scholarship Stewardship | |
| Jill Rogers Associate Director Donor Recognition Processes | |
| Diana Gallegos Castillo Donor Relations Specialist | |
| Vacant - 00054817 Fund Stewardship Coordinator | |

OFFICE OF THE SENIOR VP

Robert Bucker
Assistant to the Senior Vice President Strategic Affairs

| |
|--|
| Michelle Baehl CIQ Officer and Director Staff Development |
| Mac Andrews Project Specialist for Strategic Affairs |
| Heather Shaw Assistant to the Senior Vice President for Leadership Projects |
| Michele Andrews Senior External Relations Specialist |
| Martha Mendez Executive Assistant to the Senior Vice President |
| Cheba Nugent DEA Process Specialist |
| Bonnie Bazley Volunteer and Process Specialist |
| |
| Susan Morrison Financial Officer |
| Nici Bremer Assistant to the Financial Officer |

FINANCIAL PLANNING AND ANALYSIS

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DRIVING AWARENESS OF *SMU IGNITED*

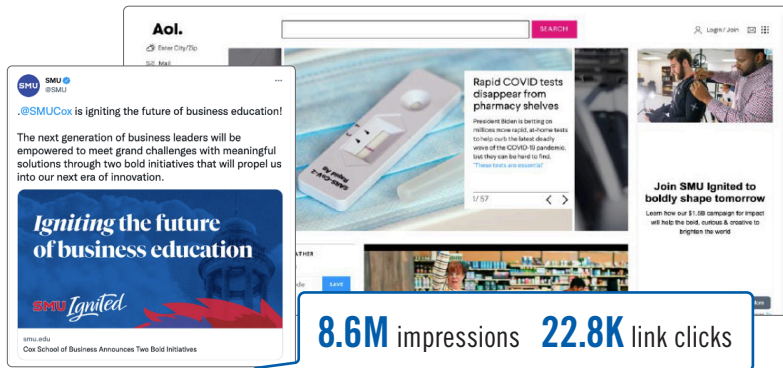
Advertising for *SMU Ignited* was conducted in three major waves during the campaign.

2021 ADVERTISING

In the month after the September 2021 kickoff, SMU used a multichannel approach to spread messages about the campaign across the state and nationally.

DIGITAL ADVERTISING

Messages delivered through native ads (which adapt to fit the context of the websites where they appear), Facebook, Instagram, LinkedIn and Twitter – all of which sent viewers to the *SMU Ignited* website



OUT OF HOME



- Digital billboards around Dallas
- Banners on and around campus
- DFW International, Love Field and Houston Hobby airport ads

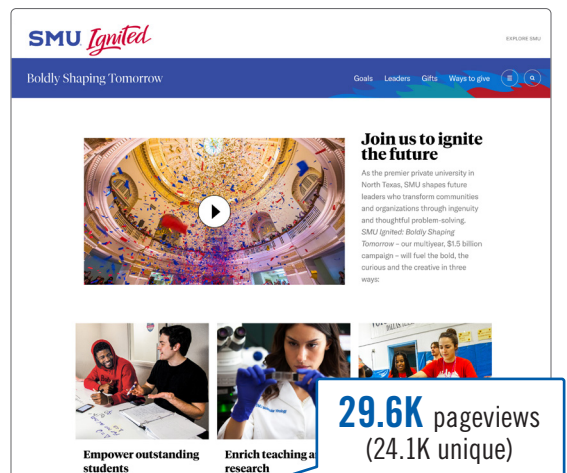
PRINT AND DIRECT MAIL



- Print ads in *The Dallas Morning News*, *Houston Chronicle*, *Fort Worth Star-Telegram* and *Texas Monthly*
- Front-page Metro story in *The Dallas Morning News* and lead editorial
- *The Dallas Morning News* insert – delivered to **123K** subscribers, mailed to **25K** households



SMU IGNITED WEBSITE



HOMECOMING

- Promotional items on the Boulevard
- In-game ads
- Dallas Hall lightshow

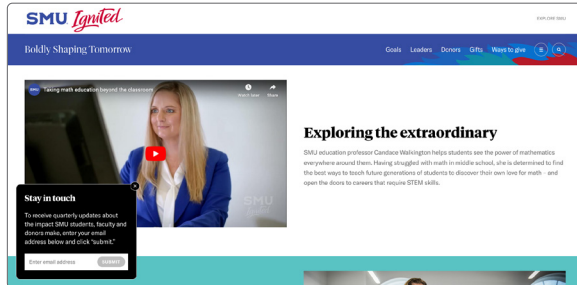


“SMU’s \$1.5 billion fundraising campaign targets the needs of North Texas”

– *The Dallas Morning News* editorial

2023 ADVERTISING

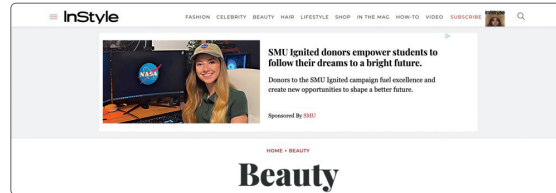
In April, May and June, SMU used a variety of channels – mostly digital – to deliver news of the University's impact more frequently to those connected to SMU, and potentially draw in people whose philanthropic passions align with the University's work. Tactics included ones that worked best during 2021, such as digital billboards and programmatic digital, and some promising new tactics, particularly video ads and emails to *Dallas Morning News* subscribers not connected to SMU. The ads drove to the campaign homepage and to landing pages with impact stories – all of which made it easy for visitors to sign up to receive future email updates about *SMU Ignited*.



Impact story landing page



Digital billboards



Native ad



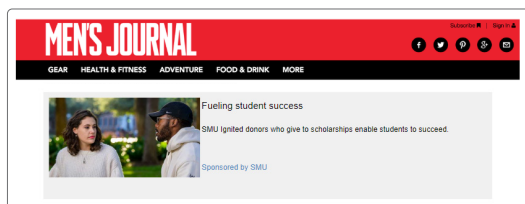
LinkedIn ads

RESULTS

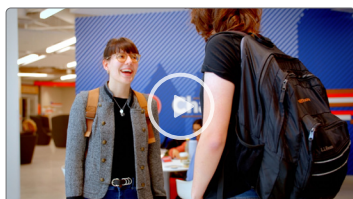
- **29.9M** impressions
- **2.1M** video views
- **23K** clicks
- **16** donations

2024 ADVERTISING

We repeated several tactics that were successful in 2023 for both engaging current SMU supporters and drawing attention from people in North Texas with philanthropic interests. Digital billboards, programmatic digital ads and videos drove to the campaign homepage and to landing pages featuring impact stories. On those pages, visitors could sign up to receive future email updates.



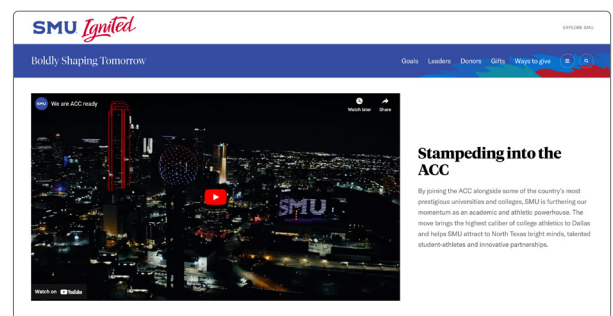
Native ad



Video ad



LinkedIn video ad



Landing page

RESULTS

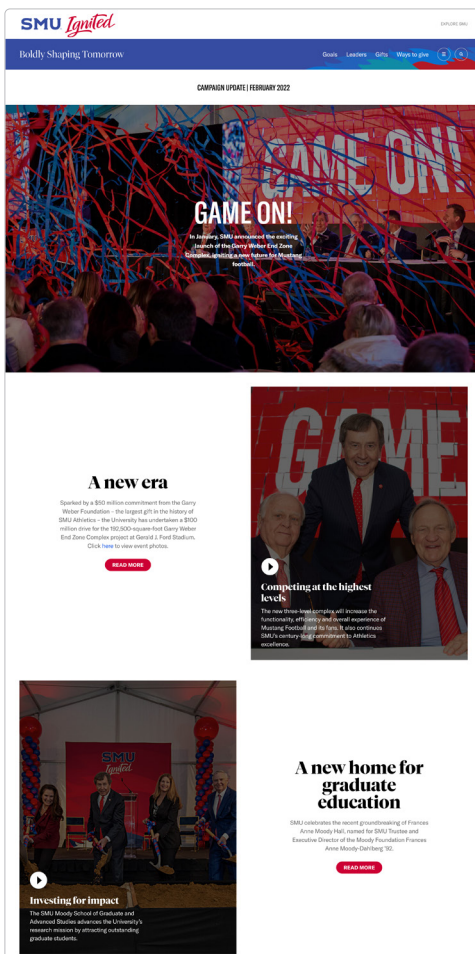
- **33.9M** impressions
- **3.9M** video views
- **52K** clicks
- **2.3X** click-through rate, year over year
- **188** donations

CAMPAIGN UPDATE

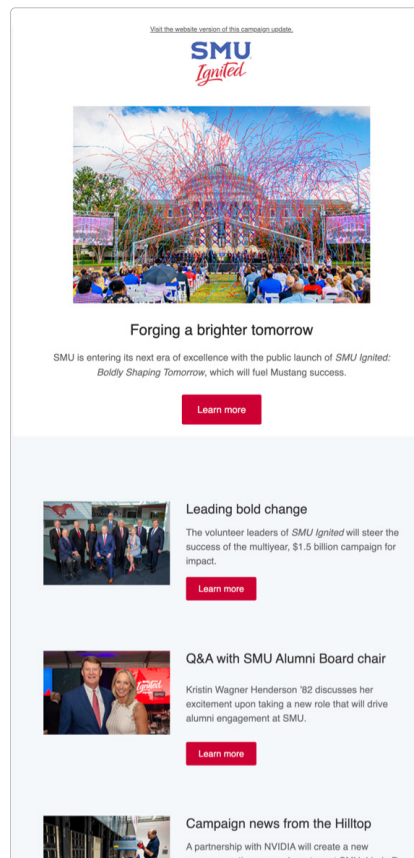
In December 2021, we launched the quarterly *SMU Ignited* campaign updates with printed and digital versions that provided dynamic experiences. Analysis of the website showed that more than half of visitors scrolled most of the way down the page. A/B tests on the email version demonstrated that a longer, more visual email generated better engagement.



Mailed version (December 2021)



Website (December 2021)



Email (December 2021)

RESULTS

- **46%** open rate for both email versions
2X industry benchmark
- **6.3%** click rate for more visual email
50% over industry benchmark
- **2:58** website session duration for more visual email
2X SMU average

PROMOTING DONOR IMPACT

Throughout the campaign, SMU Marketing and Communications promoted *SMU Ignited: Boldly Shaping Tomorrow* using a variety of channels. Gift announcements, capital project celebrations and other events – such as the following examples – provide opportunities to spread the word about the impact our donors make on the University and the greater world.

SPEARS INSTITUTE FOR ENTREPRENEURIAL LEADERSHIP – APRIL 2022

After breaking the news in a business section feature in *The Dallas Morning News*, we promoted this landmark gift through ads in *The Wall Street Journal*, newspapers in Dallas and Houston, DallasNews.com and on social media. All the ads drove to a landing page on the campaign website where people could learn more about the gift's expected impact.



The Dallas Morning News



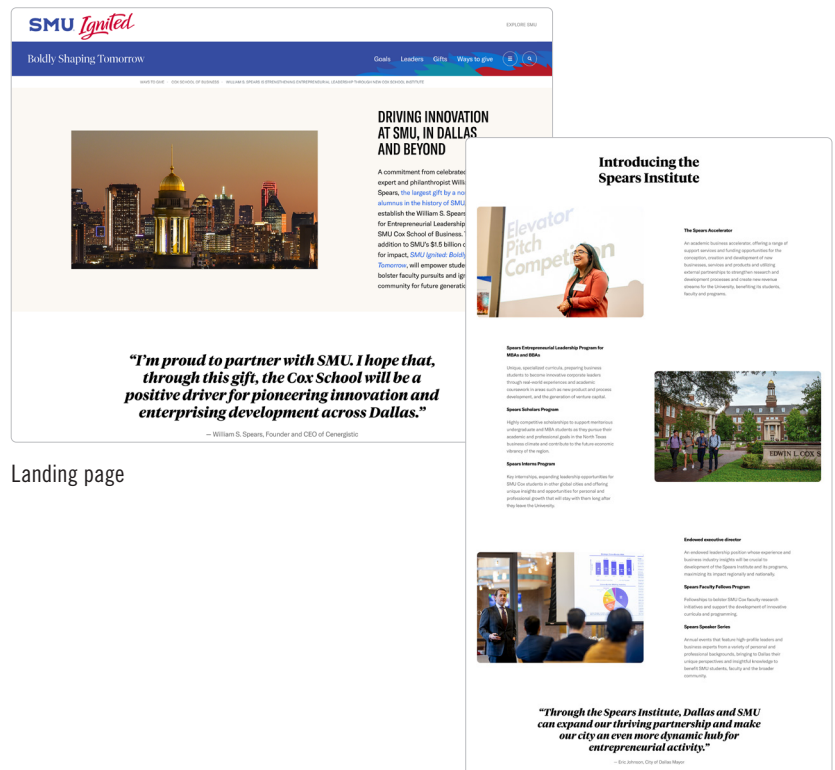
Print ad



Digital

SOCIAL MEDIA AD RESULTS

- **1.7M** impressions
- **12K** conversions
- **5X** industry average click-through rate on Facebook

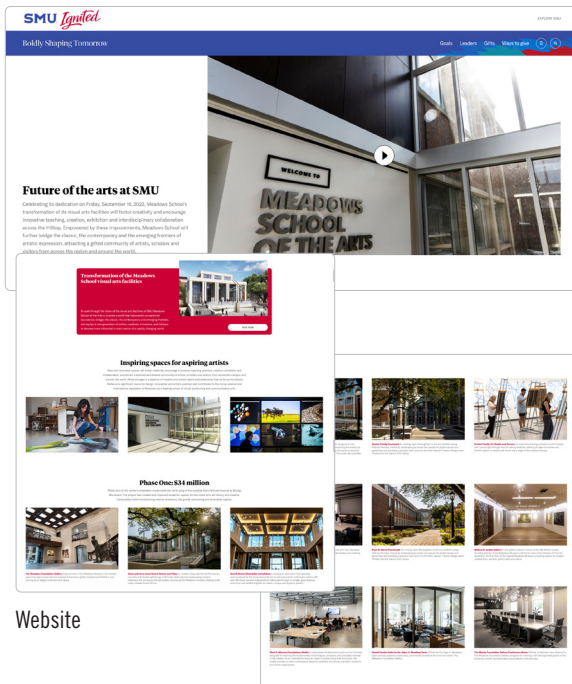


Landing page

MEADOWS SCHOOL VISUAL ARTS FACILITIES – SEPTEMBER 2022

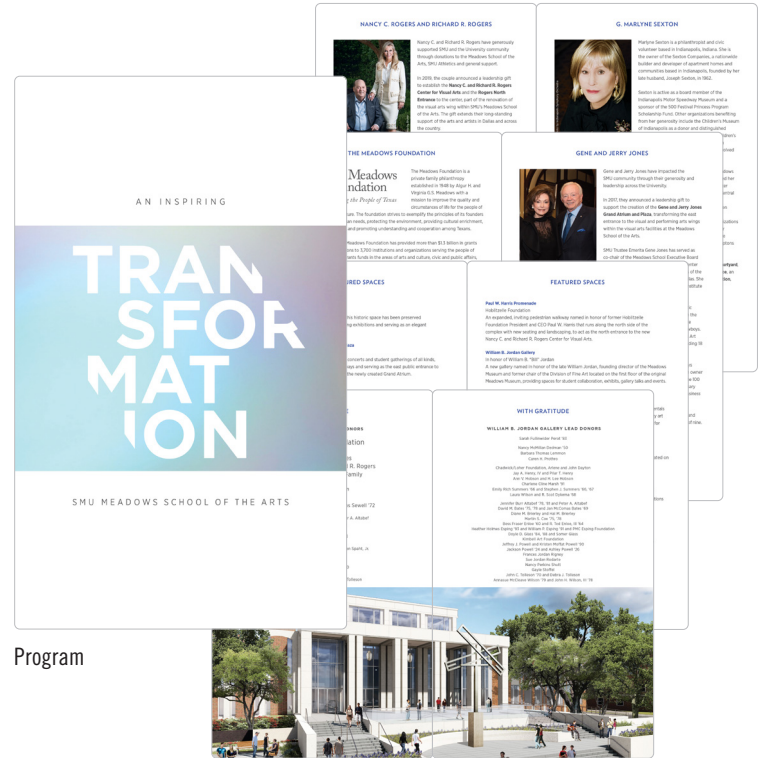


Event graphics

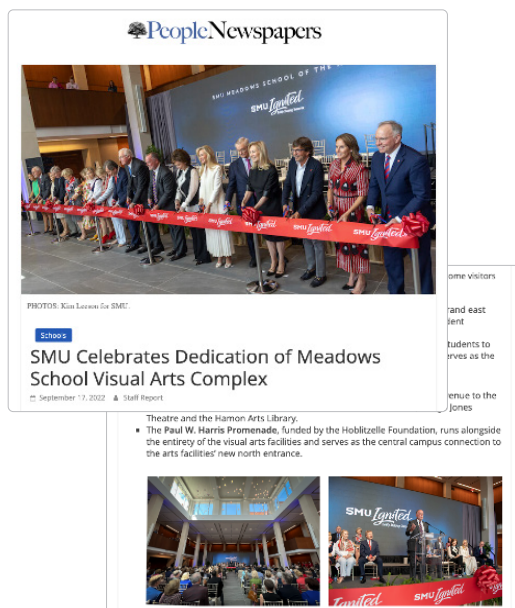


Website

In addition to print and digital invitations, we created animated event graphics, a video used at the event that showed off the new spaces and their expected impact, and a printed program with information about the donors and spaces. Digital ads and a billboard led people to the website, where they found a landing page with the video and additional information about the new facilities. The event was covered on the People Newspapers website and we partnered with NBC5 on a segment featuring Sam Holland and visual art student Sophie Kim.



Program



People Newspapers webpage



Social

SOCIAL MEDIA AD RESULTS

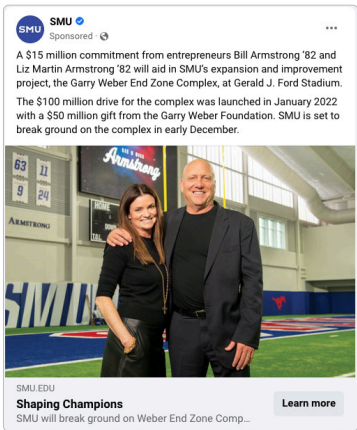
- 1.3M impressions
- 500 conversions
- 3X industry average efficiency (CPM)

ARMSTRONG GIFT ANNOUNCEMENTS – SEPTEMBER AND OCTOBER 2022

We shared news about the gift to the Weber End Zone Complex through a print ad in *The Dallas Morning News* and digital ads on DallasNews.com and social media. The story was also carried on the People Newspapers website.



Print ad



Social

SOCIAL MEDIA AD RESULTS

- 1.5M impressions
- 1.2K conversions
- 2X industry average efficiency (CPM)

For the gift to endow and name the deanship of Dedman College, we created an elegant invitation and program. After the event, we used social media ads to drive traffic to a webpage to learn more about the gift.

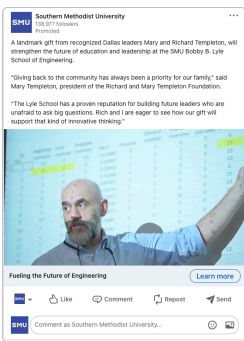


Program

Invite

TEMPLETON GIFT – FEBRUARY 2023

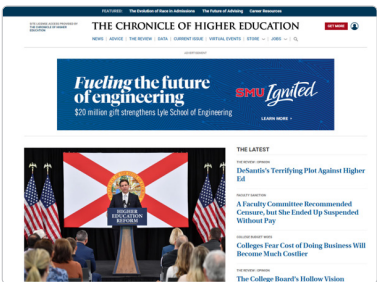
Support for this event included digital invitations, animated event graphics and a printed program, webpages, digital and print advertisements, and media outreach. Coverage of the gift was substantial, including placements on NBC 5, *The Dallas Morning News*, *Forbes*, *Dallas Innovates* and *Philanthropy News Digest*.



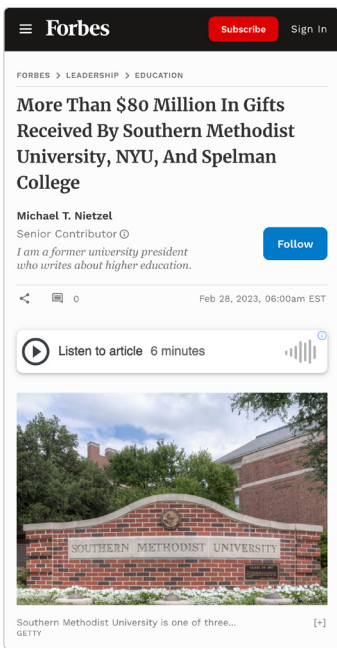
Social

SOCIAL MEDIA AD RESULTS

- 1.9M impressions
- 2.5K conversions
- 2.7X industry average efficiency (CPM)



The Chronicle of Higher Education digital ad



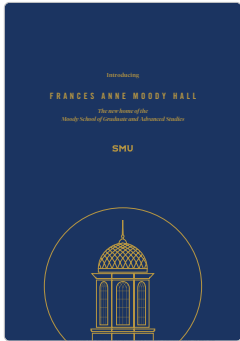
Forbes coverage



The Dallas Morning News print ad

MOODY HALL DEDICATION – SEPTEMBER 2023

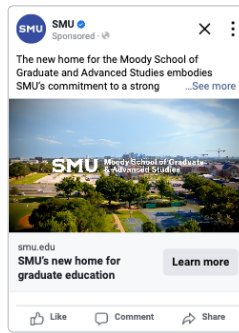
We promoted this event through print and digital invitations, animated event graphics and a printed program, videos about the Moody Foundation and about the impact of the Moody School, webpages, and digital, print and billboard advertisements.



Printed program



Billboard



Social



Video

SOCIAL MEDIA AD RESULTS

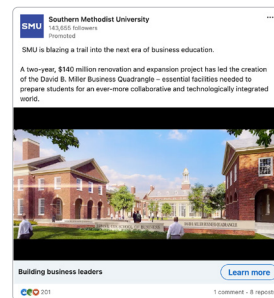
- **823K** impressions
- **8K** clicks
- **2.2X** click-through rate, compared to benchmark

MILLER BUSINESS QUADRANGLE DEDICATION – MAY 2024

Support included print and digital invitations; a video; animated event graphics and a printed program; billboard, digital and print advertisements; a webpage; a lenticular magnet; and a livestream.



Program



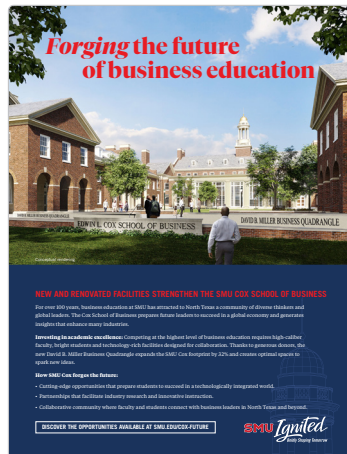
Social

SOCIAL MEDIA AD RESULTS

- **1.7M** impressions
- **11K** clicks
- **2.5X** click-through rate, compared to benchmark



Native article



Print ad



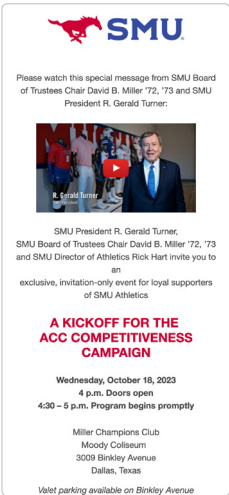
Video



Billboard

ACC COMPETITIVENESS CAMPAIGN – FALL 2023

To support the second phase of fundraising toward the costs of transitioning to the premier conference, we created an invitation to volunteers, an online toolkit of information and resources they could use when soliciting gifts, videos featuring R. Gerald Turner and David Miller, and kickoff event graphics. Around campus and the city, banners, billboard ads and yard signs touted the conference transition.



Email invite



Video



Garage banner



Pole banner



Online toolkit



Billboard



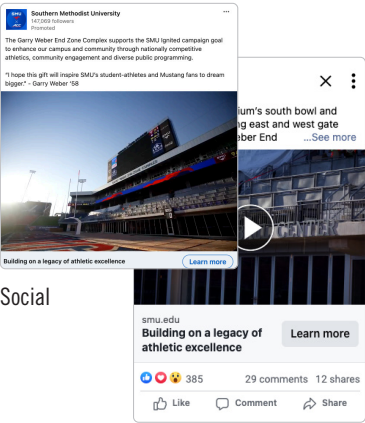
Yard signs

WEBER END ZONE COMPLEX DEDICATION – SEPTEMBER 2024

Support for these events included print and digital invitations; videos; animated event graphics and printed programs; billboard, digital and print advertisements; and a webpage.



Program



Social

SOCIAL MEDIA AD RESULTS

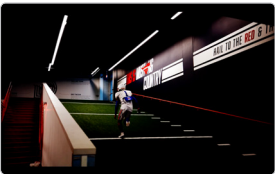
- **581K** impressions
- **872** clicks
- **2.4X** click-through rate, compared to benchmark



Print ad



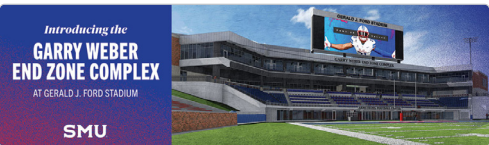
Digital ads



Video



Invite



Billboard



Appendix F. Donor Lists

As of this writing, *SMU Ignited* Major and Principal Gift donor lists are being verified. A complete list will be available in late fall.



SMU is the nationally ranked Carnegie R1 research university in the dynamic city of Dallas. A member of the Atlantic Coast Conference, SMU's alumni, faculty and more than 12,000 students in eight degree-granting schools demonstrate an entrepreneurial spirit as they lead change in their professions, communities and the world.