

# University Advancement 2007-08 Annual Report

## I. Programs

### A. *Changes in Scope of Activity*

- Initiated early stages of planning for the next major campaign, by developing and presenting, “The Future of Advancement at NC State”, to over 500 individuals, including executive officers, deans, staff members, trustees, and other volunteers.
- Reorganized the NC State Foundation Board towards the goal of it becoming one of the pre-eminent foundation boards at NC State. Developed new criteria for board nominations, reorganized the meeting format, added a Development Committee, and increased the size of the Foundation Board from 15 to 19.
- Alumni Relations completed fund raising for the Dorothy and Roy Park Alumni Center, adding \$2.83 million in new gifts and pledges from 180 donors.
- Alumni Relations successfully launched its Young Alumni Council, and the membership of the student alumni association, Student Today Alumni Tomorrow (STAT) grew to over 1,000 students.
- The Annual Giving program was re-organized and returned to University Development. A new Executive Director of Annual Giving has been recruited.
- A new Associate Vice Chancellor for Development, and a new Executive Director of Development for the College of Humanities and Social Sciences were hired, enhancing the overall quality and professionalism of the Development staff.
- Together with Luguire George Andrews (LGA), Public Affairs planned and began the implementation of a new integrated marketing effort, including defining a new

positioning and brand, developing creative approaches, identifying audiences, objectives and tactics.

- Implemented highly visible central university events and initiatives in the five strategic focus areas including the first-ever “State of NC State” address by the Chancellor; the Chancellor’s Annual Report and accompanying web-site; “Year of Energy” promotional tactics; publications, environmental graphics, marketing support for Emerging Issues Forum; and expanding marketing partnerships with Enrollment Management, Graduate School and other units.
- News Services launched two new electronic newsletters – a weekly Bulletin for employees and a monthly newsletter for external audiences with a circulation of 76,000 alumni and friends.
- Creative Services continued to grow both its list of clients, number of projects, and revenue base (from \$431,526 in FY07 to \$585,270 in FY08) with some particularly noteworthy results: 1) complete re-branding/development of recruiting materials for Undergraduate Admissions, 2) re-branding of College of Humanities and Social Sciences, 3) creative and marketing strategy support for Institute for Emerging Issues, 4) new web sites for numerous entities at NC State, 5) event, video and materials support for Millennium Seminars, and 6) designed a new print publication and Web site for RESULTS, for Research and Graduate Studies
- Reorganized Advancement Services, including the removal of a layer of middle management, and launched a national search for a new leader.

- Efforts are underway to significantly upgrade the accuracy of contact information for our international alumni, especially in East Asia. Increased employment information by 12% and email addresses by 17% for alumni who are Chinese citizens.
- Advancement Information Systems launched the eventual migration to Advance Web by upgrading Advance and Smart Call. Planning is underway to convert from Sybase to Oracle, a necessary step in moving to the Web version of Advance.
- Advancement Information Systems acquired Business Objects, a report-writing tool, which will enhance the quality of development and management reports.
- Loaded all student records into Advance, making it possible for Advancement to engage students when they are at NC State.
- Split Prospect Management and Research into two separate functions to address the significant operational challenges facing each area.
- Prospect Management created a Top 50 list of donors and prospects to be managed on behalf of the Chancellor by the Vice Chancellor for Advancement, and from University entities.
- Prospect Management led an effort to enhance the quality of nominees for consideration to the NC State Foundation Board, analyzing 3,241 former and current volunteers to recommend a pool of 166 candidates.
- Prospect Research hired and trained four new research associates to increase the number of rated and assigned major gift prospects from 2,000 to over 10,000 within the next three years.

- Prospect Research contracted to screen over 200,000 records in effort to significantly increase the number of major potential gift donors to NC State.

*B. Volume of Activities*

- Processed through Alumni and Donor Record the following: 1) 33,574 gifts, 2) 490 non-Annual Giving pledges, 3) 57,789 address changes, 4) 76,702 telephone changes, 5) 9,654 email addresses added manually, 6) 66,458 email addresses appended by vendor, and 7) 3,082 matching gifts for \$1,011,714.
- Membership in NC State’s Lifetime Giving Societies increased almost 10% from 1,261 members to 1,385. Ninety-five members were reclassified into higher giving societies, including the induction of six new members into the Alexander Quarles Holladay Society (recognizing outright gifts of \$5 million and above).
- Increased by 60% the number of gift and pledge acknowledgement letters from the Chancellor and Vice Chancellor for University Advancement to major donors to NC State.
- Attendance at Alumni Association sponsored events, where registration was required, grew by 11% over the previous year, from approximately 9,000 to 10,000 individuals. An estimated 60,000 people attended non-register events.
- News Services generated more than 250 news releases, advisories and news tip sheets, that translated to more than 5,400 “hits” by news organizations including CNN, The Discovery Channel, National Geographic, New York Times, Wall Street Journal, Washington Post, The Times of London and others.

- The redesigned NC State University Web site has averaged 65,000 visitors each day with more than 2 million visitors per month. From August 2007 to June 2008, the new site enjoyed more than 18 million visitors from more than 200 countries.
- Alumni and Donor Records increased the percentage of alumni with good email addresses from 32% to 53% over a nine-month period.
- Documented donor contacts in Advance increased by 30%.

*C. Special Achievements of Significance*

- NC State concluded its highly successful Achieve! Campaign, exceeding the \$1 billion goal by over 30%, raising in excess of \$1.3 billion dollars. All fifteen entities with campaign goals exceeded their targets.
- As of May 30, 2008, NC State University received \$170.4 million in gift revenue, breaking the University's all-time record of \$165.5 million set at the end of last fiscal year.
- The Alumni Association grew its membership to 22,885, an all-time record.

**II. Compact Plan: Major Initiatives**

- New Vice Chancellor hired effective October 15, 2007. Has met with key internal and external leadership of the University.
- Advancement Information Systems launched the eventual migration to Advance Web by upgrading Advance and Smart Call. Planning is underway to convert from Sybase to Oracle, a necessary step in moving to the Web version of Advance.

- Together with Luguire George Andrews (LGA), Public Affairs planned and began the implementation of a new integrated marketing effort, including defining a new positioning and brand, developing creative approaches, identifying audiences, objectives and tactics.

### **III. Diversity: Initiatives and Progress**

- With the support of Alumni Relations and the Alumni Association, the Black Alumni Society (BAS) held its fourth annual Black Alumni Conference in April. It focused on networking, leadership and professional development.
- Interviewed three African Americans as finalists for Executive Director positions in Development.
- In the process of developing a Unit Affirmative Action Plan, which will guide efforts by senior staff in University Advancement to recruit and retain a more diverse workforce.

### **IV. Staff**

#### *A. Major New Appointments*

- Nevin E. Kessler, hired as Vice Chancellor for University Advancement
- Kenneth Sigmon, promoted to Associate Vice Chancellor for Development
- Arnette Ejire, promoted to Director of Finance and Administration, UA
- Stacy Zearing, promoted to Executive Director of Development, CHASS
- Betty Byrum, hired as Associate Executive Director, Business and Finance, Alumni Relations

- Erin Cleghorn, hired as Associate Executive Director, Strategic Operations, Alumni Relations

*B. Kudos, professional activities and recognition*

- Becky Bumgardner, Executive Director of University Development received the Fundraising Executive of the Year Award from the Triangle chapter of the Association of Fundraising Professionals.
- Creative Services won a national CASE Bronze Medal for Undergraduate Admissions recruitment materials, and five CASE District III awards, including the Grand Award for the highly competitive Undergraduate Admissions Recruitment Program.
- The alumni magazine, NC State, and its staff won numerous awards in 2007-08, including:
  - a silver award in the League of American Communications Professionals 2007 Inspire Awards.
  - two APEX awards of excellence in the Communications Concepts' 2007 national competition. The awards were for overall excellence in the magazine/journal writing category and the category of magazines and journals with at least 32 pages per issue. NC State was one of 871 magazine and journal entries in the contest.
  - a gold award in the 2007 Publications Management Magnum Opus Awards, conducted in conjunction with the University of Missouri School of Journalism. It took top honors in the category "Best All Around Alumni

Publication.” It also received a bronze award for most improved design for its 2005 redesign.

## **V. Recommendations and Concerns for the Future**

- In the coming year, the Vice Chancellor must develop a long-term investment and funding strategy for University Advancement and its programs, including funding to support the University’s entities. This is critically important to developing the IT infrastructure to support a more robust Development program, and to funding a marketing and communications plan that can “move the needle” in positive awareness of NC State beyond the borders of North Carolina.
- In the coming year, the Provost and Deans must become engaged in a process to develop a list of university-wide funding opportunities that focus on endowment for faculty, students and programs. All care must be taken to limit the number and size of capital projects that make it on the fund raising priorities list.
- Stock market fluctuations in a down economy generally have a negative impact on major charitable giving. Focus on relationship development and expansion of the donor pool will continue to be important, so that NC State is well positioned when the economy improves.