

## **University Advancement**

### **Annual Report for 2004-05**

#### **I. Programs:**

##### **Changes in Scope of Activities**

**Alumni Relations** – In late fall, the Alumni Association began construction on the \$20-million Dorothy and Roy Park Alumni Center. The Alumni Association held a “groundbreaking” for the Park Alumni Center in February that was attended by more than 250 alumni and friends.

In November, the Alumni Association held its first “Evening of the Stars” gala, honoring the College Distinguished Alumni Award winners and the Alumni Association Award winners. On the advice of its new advisory board, the alumni magazine undertook a redesign and refocus of the magazine. In fall 2004, the Alumni Association launched STAT, Students Today Alumni Tomorrow, a student alumni association. Students pay \$20 to join and receive a benefits package (T-shirt, calendar, etc.), discounts and special programming, including career development and mentoring opportunities.

After receiving input from campus leaders, donors and past scholars, the Alumni Association’s Caldwell Fellows Scholarship Program decided to focus on attracting students after their first semester at NC State.

The Association began negotiations with the NCSU Bookstores to develop a single-ring tradition at NC State and strengthen its relationship to graduating students.

To assist the colleges in entertaining special guests during football season, the Alumni Association hosted a VIP tent at five home games. Attendance ranged from 75 to 150 guests, who were treated to a special menu of pre-game treats.

**Advancement Services** - The office assumed significant duties for Chancellor

Oblinger's Installation Invitations Subcommittee: booked hotel rooms; developed 106 category list of invitation groups to private dinner, platform and delegate groups and compiled over 6,000 names into a central database for save the date cards and invitations; tracked all responses to events; prepared

delegate listing for printed program; coordinated special mailings to platform, delegate and "VIP" groups and managed and staffed "special guest" check-in table at installation.

Organized a successful R. Stanhope Pullen Society event for planned gift donors on April 23, the first event since 2002, in conjunction with the College of Engineering.

Began planning three-day Campaign Kickoff weekend scheduled for September 22, 23 and 24, 2005 in coordination with other Advancement units and a university-wide planning committee. A three-day schedule of central and entity-specific events will begin the public phase of the Achieve! The Campaign for NC State and involve major donors, alumni, staff, faculty, students and friends of NC State.

**Development** – The fourth and final year of the quiet phase of a seven-year comprehensive campaign will be completed on August 31, with a public announcement of the campaign to be held on September 23. A major new fundraising project, \$16 million for a golf course on Centennial Campus, was begun just prior to the beginning of the fiscal year. Another fundraising project, \$3.5 million for a new chancellor's residence on Centennial Campus, was also initiated during the fiscal year. New Executive Directors of Development were hired for the College of Management and for the College of Textiles. A search is underway for a new Director of the Annual Fund.

**Public Affairs** - Continued efforts and resources were applied to sustaining the marketing and branding campaign "NC State: Achieve!" which will align with capital campaign objectives and position the university to be appreciated by our supporters. Phase four of the program was launched with new creative applications, a Website redesign, and a new tagline incorporated within the Achieve logo to reflect Chancellor Oblinger vision of NC State as exemplifying "Innovation in Action". Total impressions through the first three phases of "Achieve!" total more than 255 million. With the expansion of the effort to new advertising venues including regional editions of many major news and business magazines, the estimated total impressions has risen to more than 300 million. Airport advertising also was purchased in both Raleigh-Durham and Charlotte Douglas airports. A new

director of marketing has been hired and will continue to direct the advertising and marketing efforts for the Achieve campaign.

Responsibilities of News Services have expanded to include campaign communication efforts.

The new chancellor was introduced to the state through a series of visits, staff in Public Affairs and News Services scheduled editorial board visits, press events and donor visits for the chancellor in several areas, in cooperation with Alumni and development.

Within Public Affairs, the offices of News Services and Creative Services have strategically aligned to cooperate more on marketing projects. News Services scheduled editorial board visits and press events for the chancellor in several areas. Total news placements for 2004-2005 were up significantly. National news placements for 2004-05 were about 2,400, compared to about 2,100 in the previous year. In-state placements for 2004-05 were about 5,700 compared to 4,500 the previous year. News Services also managed several crisis communications issues this year, including the tailgate shooting and the hazing incidents, and facilitated the creation of press relations with the News & Observer's new higher education beat writer.

Creative Services is projecting \$318,000 in client billings for fiscal year 2005, an increase of \$68,000 over last fiscal year. The office has also retained an additional print designer as the most significant increase has been in design services. The office now has 68 client units within the University—Public Affairs continues to be the single largest client—the Achieve! Campaign—at 22 percent of billings, with Textiles, Centennial Campus and College of Natural Resources making up 44 percent of billings combined.

## **II. Changes in Volume of Activities**

**Alumni Association** - 10 grassroots campaign events were held across North Carolina from February to June 2005. In some cases, these receptions were also chancellor-introduction events. With the launch of STAT, the growth of homecoming, the expansion of the Alumni Association Student Ambassador Program and increased use of student interns, the Association has enhanced its student

contact triple-fold. Electronic communication with alumni grew, as *Prowling Pack* was sent to more than 11,000 Alumni Association members monthly. *NC State* magazine was mailed to 50,000 Alumni Association members, donors and selected others quarterly. The Alumni Association collected \$104,000 from the sale of Alumni Collection apparel in 2004, an increase of 42 percent. After improving marketing and branding, participation in the Alumni Association Wolf Treks Travel Program increased by 62 percent. As a result of a fall telephone campaign and other aggressive marketing techniques, the number of total members in the Alumni Association increased from 13,604 to 20,000, a 47 percent increase. Our renewal rate remained at a high 79 percent.

**Advancement Services** - Membership in the Lifetime Giving Societies as of June 30, 2004 increased by 67 new memberships to 1028 memberships. A new four-color brochure on the six levels of the Lifetime Giving Societies was designed. In 2005, the R. Stanhope Pullen Society increased its membership by 16 new members to over 500 members. New members were honored at the April 23 Pullen Society event hosted by Chancellor and Dr. Oblinger and Dean Nino Masnari for the College of Engineering. Additionally, Donor Relations organized scholarship receptions for two major individual donors on Sept. 30 and Nov. 11, and one new corporate annual scholarship donor on October 29 to meet their scholarship recipients. A total of 140 gift acknowledgement letters have been drafted and sent from the Chancellor and 105 from the Vice Chancellor to individual, corporate and foundation donors from April 2004 through May 2005. Donor Relations produced 599 endowment stewardship reports for donors/contacts of 586 endowments in the NCSU Foundation, Endowment Fund, Alumni Association Foundation, the NCSU PAMS Foundation and NC Veterinary Medical Foundation (533 reports on 545 endowments for fiscal '04). Provided stewardship to university-wide scholarship donors/contacts including biographical information and letters of appreciation from students. Briefings for executive officers and deans were prepared for 6 football games and 8 basketball games. At one peer review session, 15 reviewers identified 475 prospects, 83 of which were new. 5,000 freshmen and sophomore parents were electronically screened resulting in 3,708 new prospects; 512 of those have a giving potential of \$50,000 or above. Statistically calculated consolidated peer ratings

were compiled for 4,050 prospects. 283 research requests were fulfilled. 3,727 individuals and 775 corporations, foundations and organizations have been assigned prospect managers. This is an increase of 517 individuals and 138 organizations. Over a ten-month period, 14,700 Alumni memberships were processed with a dollar total of \$769,500. There were 1,451 matching gifts processed for \$758,300. The help desk received 4,819 requests. 22,030 gifts were processed including over 2,000 via credit cards. Over 54,000 address and telephone number changes were made, and 1,223 special requests for computer reports were filled.

**Development** – Through March 31, NC State received gifts of cash and pledges from all sources totaling \$131.6 million. \$112.9 million is in cash, and \$13.8 million is in new pledges, and almost \$10 million is in new commitments of deferred gifts (charitable remainder trusts, gift annuities, life insurance and bequest expectancies). More than \$17 million in charitable gift annuities and remainder trusts are now under active management with US Trust. Philanthropic gifts from individuals were almost \$26 million – an 8% increase over the same time period of the year before, and corporate giving exceeded \$11.7 million – an 18% increase.

**Public Affairs** – With the continuation of “NC State Achieve!” campaign, additional funding has been set aside for promotional work, and increased time has been spent on creating promotional vehicles - - crucial activities to be undertaken during the quiet phase of the capital campaign. During 200-05 news placement totals increased, both nationally and statewide. News Services and Public Affairs worked proactively with senior administrators to handle sensitive news stories. Special Events handled more than 150 events for chancellor’s office and advancement units including Founder’s Day, which came in under budget, though collections were down. Creative Services completed about 300 projects in graphic design, web design, video and presentations since fiscal year ’05 began

## **II. Compact Plan: Major Initiatives**

**Alumni Association** – Total membership increased 47% from 13,604 to 20,000, and the renewal rate was 79%. A grassroots campaign was launched to raise funds for the Park Alumni Center while continuing to solicit major gifts for the project. The Alumni Association successfully returned the

2004 Homecoming parade to Hillsborough Street. The Association began a Student Alumni Association and completed phase one of the redesign of the alumni magazine. A director of advertising and a design manager were hired to enhance the production of the alumni magazine and increase ad revenue. A director of business and finance was hired to streamline the association's business operations. The Association increased its alumni career programming and refocused the Caldwell Fellows Scholarship Program. Negotiations were begun with the NCSU Bookstores and Balfour to develop a single-ring tradition at NC State.

**Development** - The fourth and final year of the quiet phase of a seven-year comprehensive capital campaign will conclude on August 31, and a public announcement will be made on September 23. Three meetings of the Campaign Steering Committee were held. A major fundraising effort for a golf course on Centennial Campus was begun just prior to the beginning of the fiscal year, led by the Director of Development for Special Projects. The Vice Chancellor for Advancement is overseeing a fundraising effort for a new chancellor's residence on Centennial Campus.

**Public Affairs** – We continued the marketing campaign with endorsement of college-based communications units. The “NC State: Achieve!” campaign aligns with capital campaign objectives. A fourth phase of advertising featuring print ads in regionally distributed national magazines, radio spots, cable TV ads, airport displays and other vehicles have been a part of continued visibility efforts and will continue with support and funding from several college units.

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

**Alumni Association** - The Black Alumni Society (BAS) attained new leadership under Marcus Belvin '02. Belvin initiated regular monthly meetings and socials, giving the group new structure and increased contact with one another and NC State. With guidance from Dr. Jose Picart, vice provost for diversity and African American affairs, BAS developed the Inaugural Black Alumni Conference in April, attended by 100+ African American NC State alumni. It focused on networking, leadership and professional development.

**Advancement Services** - Minority representatives are on three university-wide committees: SPA Grievance and Dispute Panel, Diversity Advisory Committee, and Business Officers. A minority female attended the Women Administrators North Carolina Higher Education Conference and a minority female was promoted as the Executive Director of Alumni & Development Services. A female was selected as a Pathways participant and a minority male was added to the SPA staff. Financial assistance is provided for the Brotherhood and Sisterhood dinners.

#### **IV. Staff:**

##### **Kudos, Professional Activities and Recognition**

The NC State Alumni Association garnered three CASE District III awards: Special Merit in Overall Alumni Relations Programs, Special Merit in Alumni Relations Special Events for Homecoming and Special Merit in Alumni Magazines for *NC State*. Johnny Burleson, director of membership and marketing, was named the University Advancement EPA Employee of the Year. Joan DeBruin, Director of Gift Planning, served on three professional or university-related boards: Planned Giving Council (as second vice president); Triangle Financial Planning Association; and Arts NC State. Ed Hand, Director of Corporate and Foundation Relations, was a presenter at the UNC General Administration conference on Educational Access held in Wilmington in February. Becky Bumgardner served on the university's Institutional History and Commemoration Committee and the Connecting in North Carolina tour planning committee. Public Affairs continued the marketing campaign with endorsement of college-based communications units. The "NC State: Achieve!" campaign aligns with capital campaign objectives. Troy Wojcik was selected as the University Advancement SPA employee of the year. Arnette Ejire was promoted to Executive Director of Alumni & Development Services.

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

Budget needed to upgrade and enhance the alumni database, with the first priority being to incorporate all current students in the database and develop a system for adding future students as soon as they

enroll. A greater emphasis and more resources need to be directed toward locating “lost” alumni and improving data integrity. We need to move our computing operations into a model which makes it part of the University’s core business, receiving priority funding and support.

The Alumni Association wants to increase contact with current undergraduate students through traditions (ring ceremony, orientation, Homecoming, Founders Day) as well as STAT and build more connections between students and alumni through career mentoring and its club structure. Hire a clubs director to rebuild the in-state and out-of-state network.

Adequate funding to conduct the public phase of the campaign remains a concern for Development, especially salary dollars to retain and attract outstanding professionals. With the continuation of the implementation of a marketing campaign that will also support the capital campaign, new sources of revenue for promotional vehicles will be needed. Although the silent phase has been extended for one year, there is no additional funding in the campaign budget to maintain marketing effort for the additional period. The university’s “brand” must be fed and nurtured through continued use in internal publications, newsletters, Web sites, news releases, advertising, special events and other promotions. For the Office of Public Affairs, marketing and promotional efforts have been funded by special one-time appropriations from several foundations. That funding has been expended and the current operating budget of the unit is not sufficient to continue major marketing efforts at the level to which we have aspired in the past three years. Further funding opportunities must be sought to continue marketing efforts.