

University Advancement

Annual Report for 2005-06

I. Programs:

Changes in Scope of Activities

Advancement Services – In conjunction with other Advancement units and a university-wide planning committee, Donor Relations coordinated a celebration to kick off the public phase of *Achieve! The Campaign for NC State*. The three days of events began on Thursday night, September 22, with the “Big Bash”, an evening of “unabashed fun” for faculty, students and guests, starting with an open reception and entertainment at the Talley Student Center. This was followed by brief presentations from Chancellor Oblinger, Vice Chancellor Terry Wood, and Campaign Executive Committee member Ann Goodnight in Stewart Theatre and concluded by a performance by Raleigh-born Lauren Kennedy and her husband Alan Campbell. On Friday, September 23, the kickoff activities continued with the official campaign public announcement at the McKimmon Center. The announcement was followed by a luncheon organized by the office for members of the Campaign Steering Committee, major donors to the campaign, campaign corporate donors, NC State executive officers, and staff. During the evening of Friday, September 23, the *Achieve! The Campaign for NC State* Kickoff Gala was held at Prestonwood Country Club. This black-tie formal dinner had 404 attendees including \$1M+ donors, Campaign Steering Committee, and Lifetime Giving Societies members. On April 6, 2006, Donor Relations organized a successful R. Stanhope Pullen Society event for planned gift donors in conjunction with the College of Education at the new William & Ida Friday Institute for Educational Innovation with 116 attendees. During December 2005 Advancement Services moved into the new E. Carroll Joyner Visitor Center and Advancement Services Building. This facility allows us to consolidate into one location and work in the same building with Foundations Accounting & Investments. In conjunction with Wachovia Bank, a Webachieve bank draft process was put into production. A second server was added to the Advance system that enables us to conduct data tests while still in production mode. University Advancement’s Business Continuity and Disaster Recovery Plan was prepared.

Alumni Relations – During fiscal year 05-06, the Alumni Association began its strategic and operational planning for the new Dorothy and Roy Park Alumni Center. The Association plans to move to its new location in late summer 2006. The Alumni Association communications staff completed the redesign and refocus of the alumni magazine. The redesign met with rave reviews from alumni, staff and communications professionals. The Association launched a members-only tent at all ACC home games, offering members a free barbecue meal if they showed their membership card. Attendance grew from 250 to 400 members by the end of the season. The Association aggressively increased awareness among students with roles in the following activities: student/parent orientation, convocation, Homecoming and Senior Class activities. Consequently, membership in STAT (Students Today Alumni Tomorrow) doubled from 350 to 700, and the student organization planned activities for every month of the school year. To strengthen the Alumni Club network, the association hired a director of NC State Clubs. Additionally, the staff was reorganized and a five-year strategic plan was created by the staff in conjunction with the leaders of the Alumni Association Board of Directors.

Development – The first year of the public phase of the Achieve! Campaign is well underway with new energy. The highlight was a gala public phase kickoff on September 23. This energy includes plans for public phase publicity, which will be initiated by an article in the Summer 2006 issue of the Alumni Magazine, with a letter from the Chancellor being the centerpiece. The new fundraising projects from the 2004-2005 Annual Report on the golf course and new chancellor's residence are positively progressing. A new Executive Director of Development for the College of Management was hired and is focusing on North Carolina corporations. The new Senior Director of Gift Planning is focusing on endowments.

Public Affairs – In support of the Achieve! Campaign, Public Affairs planned and implemented the launch of the public phase of the campaign including the design of campaign logo, materials, fact sheets and other information provided to campus entities. A Campaign Website was created including all writing and photographs, which was launched on the day of the public announcement. Working with other units within Development and Alumni, Public Affairs staged a media event for the launch including staging, signage, releases, speeches, photography, video and media kits. Coverage of the launch was significant including stories on the two major gifts announced that day.

The Public Affairs staff also was significantly involved in scripting, content and design of the campaign film that was shown at the campaign gala. A campaign mailing with the DVD of the film and promotional materials on all the colleges also was produced. In addition to Campaign activities, Public Affairs has led the effort to develop exhibits for the new E. Carroll Joyner Visitor Center and worked with the exhibits designer to install the exhibits by the anticipated opening date of September 23, 2006. In other promotional activities, Public Affairs worked with the Chancellor's Office on a series of direct mail pieces to convey the university's achievements to identified influentials, designed and produced an overview brochures on the university and secured sponsors so that a campus map and visitor guide for use by the Visitor Center could be designed and produced at no charge to the Visitor Center. In the area of News and Communication, the staff of News Services was expanded and capabilities beyond media relations were added. A formal issues management process was developed to work with the Chancellor's Office staff, Provost Office and other Executive Officers to better manage communications issues and opportunities. 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 2005-06 were up significantly. National news placements for 2005-06 were up about five percent compared to about 2,400 in the previous year. In-state placements for 2005-06 were up about 11 percent compared to 5,700 the previous year. Creative Services is projecting \$427,000 in client billings for fiscal year 2006, an increase of 37% over last fiscal year. The office has hired two new designers, one in print and the other in web and multimedia, partly as a result of a contract with the College of Natural Resources to redesign and deploy web sites for their college and all departments. Jason Simon has joined the office as Associate Director, in addition to his Director of Marketing role, providing additional project management strengths as the client workload increases. The office now has 102 separate client units within the University, with Public Affairs continuing to be the single largest client. As during last fiscal year, new clients, however, make up nearly half of the volume as the office continues to grow.

Changes in Volume of Activities

Advancement Services – Membership in the Lifetime Giving Societies as of June 30, 2005 increased by 94 new memberships to 1,178 memberships. 67 members were reclassified into higher giving societies including the induction of 2 new members into the Alexander Quarles Holladay Society (society recognizing outright gifts of \$5 Million and above). In 2006, the R. Stanhope Pullen Society increased its membership by 19 new members to 551 members. Chancellor and Dr. Oblinger and Dean Kay Moore for the College of Education honored new members at the April 6 Pullen Society Event. Additionally, Donor Relations organized scholarship receptions for three major individual donors on October 3, November 8, and November 18 and one corporate annual scholarship donor on September 30 to meet their scholarship recipients. Donor Relations also assisted with the planning and logistics for the PAMS “Realizing Possibilities” scholarship dinner on March 7. A total of 93 gift acknowledgement letters have been drafted and sent from the Chancellor and 181 from the Vice Chancellor to individual, corporate and foundation donors from July 1, 2005 through June 30, 2006. Donor Relations produced 642 endowment stewardship reports for donors/contacts of 604 endowments in the NCSU Foundation, Endowment Fund, Alumni Association, the NCSU PAMS Foundation and NC Veterinary Medical Foundation (599 reports on 564 endowments for fiscal '05). Provided stewardship to university-wide scholarship donors/contacts including biographical information and letters of appreciation from students. Donor Relations maintained a University Advancement development event calendar to track and keep staff informed of development activities and events across campus. Over a ten-month period, 15,924 Alumni memberships were processed with a dollar total of \$832,950. There were 923 matching gifts processed for \$792,627. The help desk received 4,763 requests. 28,897 gifts were processed including 2,521 via credit cards. 50,595 address and 51,908 telephone changes were made, and 1,602 special requests for computer reports were filled. 4,079 individuals and 862 organizations have been assigned prospect managers. This is an increase of 352 individuals and 87 organizations. 320 research requests were fulfilled and 182 prospect reports were delivered. Briefing books for executive officers and deans were prepared for 7 football games and 8 basketball games.

Alumni Association - The grassroots campaign for the Dorothy and Roy Park Alumni Center raised \$2.12 million by sponsoring 18 campaign events attended by 917 people. Membership in the Alumni Association increased from 20,000 to 21,300. Through its student programming efforts, the Alumni Association doubled the membership in STAT (Students Today Alumni Tomorrow) from 350 to 700 members. More than 900 students purchased an "official" NC State ring after launching the ring program in the fall. About 300 alumni traded their previously purchased ring for an "official" ring. Participation in the Wolf Treks Travel Program increased by 45 percent after an aggressive marketing campaign. Attendance at Alumni Association events increased: 5,150 guests attended 50 pre-registered events and an estimated 85,000 alumni attended non-registered events (i.e., homecoming parade/concert, fan zone, club gamewatches and community service, student events (STAT and senior class).

Development – Through March 31, NC State received gifts of cash and pledges from all sources totaling over \$153 million. \$112.7 million is in cash, and \$32.3 million is in new pledges, and almost \$8 million is in new commitments of deferred gifts (charitable remainder trusts, gift annuities, life insurance and bequest expectancies). Philanthropic gifts from individuals were over \$26 million – a 2% increase over the same time period of the year before, and corporate giving exceeded \$14.6 million, which is a 19.8% increase over last year.

Public Affairs – With the continuation of the 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. News placement totals increased, both nationally and statewide. News Services and Public Affairs worked proactively with senior administrators to handle sensitive news stories. Creative Services completed about 375 projects in graphic design, web design, video and presentations since fiscal year 2006 began.

II. Compact Plan: Major Initiatives

Alumni Association – Total membership increased 6.5 percent from 20,000 to 21,300 and STAT membership doubled from 350 to 700 members. A grassroots campaign for the Park Alumni Center raised \$2.12 million by sponsoring 18 campaign events attended by 917 alumni and university friends. A director of alumni clubs and outreach was hired and work was begun to revitalize the alumni club structure. At the alumni club leadership

conference in April 2006, the Alumni Association presented a new club manual designed to ensure a stronger club network through selection of club officers, leadership rotation, event guidance and more. In its efforts to revamp its primary communication tools, the Alumni Association communications staff launched the redesign of the alumni magazine in fall 2005 and continues to refine its design and content. The new Web site design is set to launch in June 2006 and the redesign of the monthly e-newsletter, Prowling Pack, will occur in July 2006. To improve data in the Advance database, two alumni biographical data assistants were hired. In addition to updating records, these data assistants are focusing on projects such as locating lost alumni and tagging special-interest groups. Plans are underway for a series of opening events for the Park Alumni Center in late fall and early winter that will introduce the facility to donors, alumni, the campus community and the general public. The building and grounds are set for completion by October. The Alumni Association Board of Directors is making final decisions about building operations, including dining options, room rentals and catering.

Development – The first year of the public phase of the campaign will be highlighted by a focus on endowments, by our new Senior Director of Gift Planning and a new Assistant Director of Gift Planning. The Annual Fund, in collaboration with the Alumni Association, is being revised to more effectively solicit unattached graduates of NC State. Finally, a major strategic planning initiative is being formed to maximize the benefits of the Achieve! Campaign.

Public Affairs: Support of the public phase launch of the Achieve! Campaign and the design and installation of the Visitor Center exhibits were two of the primary initiatives undertaken in 05-06, in addition to continued work on media relations and communications efforts on behalf of the university. These efforts included working with the college-based communications staff, the Alumni Association, Chancellor's Office, Legislative Affairs and the Provost's Office.

III. Diversity: Initiatives and Progress

Female completed Pathways Leadership Program, minority female SPA hired, and male SPA hired. The Black Alumni Society (BAS) held its second annual Black Alumni Conference in April. Attendance increased by 50

percent, with more than 150 African American NC State alumni registering for the event. It focused on networking, leadership and professional development.

IV. Staff:

Kudos, Professional Activities and Recognition

The Alumni Association has garnered three awards. The 2004 Evening of Stars Gala garnered an Award of Excellence in the category of Alumni Relations Projects in CASE District III. Similarly, the alumni magazine won an Award of Excellence in the Magazine Publishing Improvement category in CASE District III and an APEX Award of Excellence. Chris Richter, assistant editor of the alumni magazine, was named the University Advancement SPA 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. In June, Joan DeBruin transferred to the UNC-Medical Center Foundation. Becky Bumgardner serves on the university's Institutional History and Commemoration Committee and the Connecting in North Carolina tour planning committee. The Office of Public Affairs received six awards from CASE District III including: a grand award (top prize) for Best Overall Website Design and Implementation (Achieve! Campaign Website). Two awards of excellence for publications designed by Creative Services (Chancellor's Installation Mailing" and "Guide to Giving"); three special merit awards for fundraising materials, for promotional campaign (Innovation in Action) and for a CD project designed for a college client (CNR, Parks and Recreation) and for promotional television spots (Innovation in Action).

V. Recommendations and Concerns for the Future

The current campaign resources are provided by University allocated support of \$588,000 and by foundations of \$418,000, primarily through endowment assessments. The support from CALS, Engineering and Vet Med will continue for one year after the campaign and should total approximately \$150,000. The remaining \$268,000, as well as the University's support of \$588,000 is scheduled to terminate on June 30, 2008.

Although two new biographical data entry assistants have been hired, our first priority of being able to incorporate all current students into the database and develop a system for adding future students as soon as they enroll has

not been completed. It is believed, our future growth, alumni membership, cultivation, annual and major giving are directly related to our ability to engage and serve current students. 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. To this end, it appears no major progress or change has been made in the Alumni Association's ability to participate in Parent's and Freshmen Orientations. In addition, moving into the new Park Alumni Center will present unforeseen budget and programming challenges as our visibility and expectations of service to all alumni will certainly increase. We are moving from less than 4,000 square feet to 60,000 square feet with no change in staffing or real increase in budget. It is believed the volume of visitors and tours alone will grow exponentially. We are also planning at least three major "grand opening" events that must be funded, as well as planning private dinner parties for our major donors. These are all major concerns and challenges for the 2006-07 fiscal year.

Adequate funding to conduct the public phase of the campaign remains a concern of University Development, especially salary dollars to retain and attract outstanding professionals. With the implementation of the public phase of the Achieve! Campaign, new sources of revenue for promotional vehicles will be needed.

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. As the office leads the effort to redesign and significantly improve NC State's presence on the Web, additional staffing should be put in place dedicated to maintaining this improved Web presence.