

University Advancement

Annual Report for 2006-07

I. Programs:

Changes in Scope of Activities

Advancement Services - The Alumni & Development Services team launched an e-newsletter and initiated an Advancement Services orientation program on gift processing, database reporting, and prospect management and research. The Office of Prospect Management & Research served on a task force for Corporate and Foundation Relations to focus on solicitation strategies for the top corporate and foundation prospects and assumed the research responsibility of C&F for development and executive officers. The Office of Information Systems successfully completed the upgrade of the Advance database and purchased the QAS software that will help format addresses to the US Postal Service standards. Two biographical specialists were hired to support overall improvement in the quality/quantity of the data maintained. Alumni & Donor Records have made efforts to contact donors who appear to be employed by a matching gifts company but have not submitted a matching gift form. The annual Lifetime Giving Societies event was held for over 500 guests. The office organized a successful R. Stanhope Pullen Society event for planned gift donors in conjunction with the NC State Alumni Association.

Alumni Relations - The Alumni Association moved to the new Dorothy and Roy Park Alumni Center on Centennial Campus. The Association held three opening events to honor donors and to dedicate the facility. The Campaign for Excellence reached its goal of \$20 million for the Park Alumni Center and launched a bricks-and-pavers campaign.

The NC State Annual Fund moved its operations and staff to the Alumni Association.

The Alumni Association hired a programmer to add current students to the database.

Development - The *Achieve!* Campaign surpassed the \$1 billion goal 19 months ahead of schedule. Plans for a revised annual giving program consolidated under the Alumni Association were developed and the new program to grow annual support, along with alumni memberships will roll out on July 1, 2007. A new Executive Director of Development for the College of Veterinary Medicine and Director of Development for the College of Education were hired.

Public Affairs - The Achieve! Campaign began a new marketing and communication effort with leadership from Public Affairs in the university's ad hoc Strategic Marketing Advisory Committee. A new positioning study was commissioned and the final recommendations were accepted and revised. These positioning elements and research will be a crucial part of the planning and implementation of a new marketing effort to begin in late July 2007. The ncsu.edu website was rebuilt, including the architecture, branding messages, site structure, wire frames, content and visual design of the site. The new site is to improve the content, navigation, and visual design, while building new opportunities to convey the brand and character of the university and recruit students. A four-person Web Team charged with maintaining the new site has been established with support from the Chancellor's Office. A new calendar system for the site was established, a university-wide Content Management System was acquired and training on the system was begun. A new "NEWS" site was launched, which offers many new feature-driven array of information about the university. An "issues management procedure" was implemented and included staff from the chancellor's office, external affairs and federal relations. Planning for an electronic newsletter to be distributed to a

broad off-campus audience with the first edition planned to coincide with the launch of the new Website in August '07. An additional on-campus edition of the newsletter is being designed to replace the printed "Bulletin". Creative Services has become a strategic unit, partnering with campus clients to provide integrated marketing communication services.

Changes in Volume of Activities:

Advancement Services - Lifetime Giving Societies increased by 83 memberships; 72 members were reclassified into higher giving societies including 2 new inductions into the Alexander Quarles Holladay Society (recognizing cumulative giving of \$5 Million and above): The Donor Relations Office assisted in organizing the E. Carroll Joyner Visitor Center Dedication and the dedication of the William Rand Kenan, Jr. Library for the NCSU Libraries and the College of Veterinary Medicine. Donor Relations assisted in an event to publicly announce the \$1 Billion goal achievement for the *Achieve! Campaign*. Donor Relations organized scholarship receptions hosted by the Chancellor for three major individual donors to meet their scholarship recipients. New members were honored at the annual R. Stanhope Pullen Society event. Gift acknowledgement letters were drafted and sent from the Chancellor and from the Vice Chancellor to individual, corporate and foundation donors. Stewardship reports were produced for donors/contacts of endowments in the NCSU Foundation, Endowment Fund, Alumni Association Foundation, the NCSU PAMS Foundation and NC Veterinary Medical Foundation. Provided stewardship to university-wide scholarship donors/contacts including biographical information and letters of appreciation from students. As of May 31, 2007, 14,868 Alumni memberships were processed with a dollar total of \$565,265. There were 1,919 matching gifts processed for \$1,046,505. The help desk received 5,654

requests. 29,056 gifts were processed including 3,168 via credit cards. 48,453 address and 49,849 telephone changes were made to the biographical database, and 1,681 special requests for computer reports were filled. 4,376 individuals and 1,033 organizations have been assigned prospect managers. 245 research requests were fulfilled. Briefing books for executive officers and deans were prepared for 14 home football and basketball games.

Alumni Association - Attendance at Alumni Association events increased: 8,950 guests attended 70 pre-registered events and an estimated 85,000 alumni attended non-registered events. The Association held 30 senior send-offs that were attended by 800 students and 1,200+ parents. An additional seven senior send-offs were held in conjunction with the Wolfpack Club Spring Caravan. The STAT (Students Today Alumni Tomorrow) membership from 700 to more than 1,000 members. More than 700 students purchased an “official” NC State ring that were awarded during spring and fall ring ceremonies. The Association developed a Young Alumni Advisory Board that will implement a Young Alumni Council to better serve NC State's increasing population of recent graduates. The Association partnered with the Union Activities Board to hold the annual Red and White Ball in the Park Alumni Center. Participation in the Wolf Treks Alumni Travel Program increased by 45 percent.

Development – Through March 31, NC State received gifts of cash and pledges from all sources totaling over \$155 million. Of that amount, \$132 million is in cash, \$5.9 million is in new pledges, and \$17.6 million is in new commitments of deferred gifts (charitable remainder trusts, gift annuities, and bequest and beneficiary designations).

Public Affairs - Strategic marketing and communication activities were expanded by designing special events and activities that emphasized strategic objectives including

international education opportunities (China event), economic development, emerging technologies, the student experience and leadership in specific research areas.

A promotional booklet about the university was produced for use by the university community. News Services conducted five media training sessions for campus experts and administrators. Total news placements were up significantly with about 6,000 national and international media placements. Creative Services is projecting \$435,000 in client billings for fiscal year 2007. More than 114 campus-wide clients were served, equating to about 300 total projects.

II. Compact Plan: Major Initiatives

There are five major initiatives for the compact planning period of 2007 through 2010 for University Advancement.

1. Secure stable funding for University Advancement following completion of the Achieve! Campaign.
2. Establish and maintain a state-of-the-art database on students, alumni and friends.
3. Begin ground work for the next campaign, \$2 billion range.
4. Increase the stature of the University through communications and marketing investments.
5. Prevent a drop in annual receipts from \$150 million following the campaign.

Alumni Association – The Alumni Association moved to the new Dorothy and Roy Park Alumni Center on Centennial Campus and hosted dedicatory events. Fundraising efforts for the Campaign for Excellence reached its goal of \$20 million for the Park Center and launched a bricks-and-pavers campaign. NC State University and the Alumni Association formalized its relationship with The State Club through a detailed agreement.

Alumni Association membership stands at 20,000 members. The Board of Directors agreed to pay for a programmer to add current students to the alumni database.

Development - University Development efforts will be focused on not only sustaining, but building upon, the success of the *Achieve!* Campaign. The annual giving program, in consolidation and close coordination with the alumni association, will work to engage more alumni in support and engagement through a combined membership and giving program. A revised corporate and foundations relations function will build on the strengths of college based relationships to increase the investment in the University by our corporate and foundation partners. The planned giving staff will work to identify and secure endowment opportunities with our constituencies. The collective strengths of our college and entity development team will be leveraged to build the major gift program and to help secure the future of the University through endowments.

Public Affairs - Publicly launch the new www.ncsu.edu website, including promotional activities. Complete hiring, training of new Web Development unit (four positions) within Public Affairs, with special attention to integration of the new staff into the strategic communication objectives of Public Affairs; begin workflow design and operating budget forecasts for continued development of Web content. Continue on-going strategic communications and marketing efforts that reflect university's stated goals, and begin implementing the recommendations of the awarded vendor (above). Efforts will include, among others, Chancellor's Annual report, new email-based university-wide newsletter and an on-campus version to replace the print Bulletin; media tours and other marketing efforts focusing on Centennial Campus; an intensive focus on energy policy and research and on NC State's economic development leadership role.

III. Diversity: Initiatives and Progress:

UA continues to support diversity in hiring practices, promotional opportunities and initiatives. A minority female continues to serve on the University Diversity Advisory Committee and two minority females have recently been promoted into leadership roles. The Black Alumni Society (BAS) held its third annual Black Alumni Conference in April. It focused on networking, leadership and professional development.

IV. Professional Activities:

Kudos, Professional Activities and Recognition

The alumni magazine won an APEX Grand Award in the Communications Concepts 2006 national competition for overall excellence in the category of magazines and journals printed in four colors. Co-Editor Becky Morphis garnered an Award of Excellence in the feature-writing category for an article, "Blood from a Stone". Astra Barnes, director of alumni clubs and outreach, was named the University Advancement EPA Employee of the Year.

The staff of Creative Services received Awards of Excellence for design of Visitor Center graphics and multimedia materials, and for the Biennial Report for the College of Textiles. University Advancement hosted the third annual North Carolina University Advancement Conference for the 16 system advancement programs at the McKimmon Center.

V. Recommendations and Concerns for the Future:

Alumni - A major concern for the future is the relationship of the university and the Alumni Association with the State Club. The Alumni Association faces the new challenge of managing the university Annual Fund. Increasing revenue while continuing growth of the Alumni Association membership program can be a source of great support

for the colleges and this will require coordination as well as funding. Focus on updating the database is critical to the cultivation of young alumni and the success of donor cultivation throughout the university. An ongoing concern is obtaining viable e-mail addresses on a greater portion of our alumni population.

Development – Appropriate and sustainable funding for University Development is a major concern for the central development operation. Adequate funding will help develop an appropriate organizational chart with accompanying roles and responsibilities so that pan-university development programs can be fully served.

Public Affairs - Continued willingness by the Chancellor and university to champion more consistent communication messages and brand identity for the university is needed. Resources are needed for a funding and staffing model that will support the implementation phase of the marketing and communications efforts recommended by Art & Science and the selected agency. Continued access is needed to the chancellor and provost to facilitate sharing of priority goals for communication efforts. This will require funding for a contract with a full-service public relations, marketing and communications firm to work with Public Affairs staff.

Advancement Services - See Major Initiatives on Page 6.