

University Advancement 2008-09 Annual Report

I. Programs

A. *Changes in Scope of Activity*

- Continued to plan for the implementation of the next university-wide capital campaign in 2012-13, focusing on the need to develop a long-term sustainable funding model for development and the other advancement functions at NC State. Made a presentation that included benchmarking data from peer schools to over 200 individuals including members of the Board of Trustees Development Committee, the NC State Foundation Board, the Research Council, and other staff and volunteers.
- Developed and formalized a new Gift Acceptance Policy for NC State, and established Standard Operating Procedures for Gift Acceptance, adhering to industry standards and best practices in higher education.
- Adopted Best Practices in Relationship Management, university-wide, to promote more documented engagement of major gift donors and potential donors.
- Revamped gift and pledge processing policies and procedures to ensure compliance with CASE, IRS, FASB and GASB requirements and best practices. This resulted in major changes for recording of non-governmental and University Gift deposits.
- In partnership with Luguire George Andrews, implemented what has become known as the “Red Means Go” brand awareness campaign, resulting in significant enhanced visibility of NC State through broadcast and print advertising, social networking sites like Facebook and YouTube, and other related channels. In less than two years, NC State’s YouTube channel has become the third most popular channel among ACC schools as measured by channel views and subscribers.

- Created and distributed a new Brand Book, with the input of a special task-force of communicators across campus, to promote a more unified visual image and messaging in internal and external communications.
- Working with the Provost's Office, and the Committee on Committees, eliminated the Institutional History and Commemoration Committee and established two more efficient committees to review the naming of facilities and programs for donors and in honor of individuals or organizations.
- The Alumni Association expanded its range of activities to include a more comprehensive and structured system of alumni outreach networks, establishing 37 networks, and holding at least two events in each region within the first year. Expanded constituency programming to include groups such as the Alumni Healthcare Professionals, English Alumni Society, and the Analytics Alumni Society. Young Alumni Council transitioned from planning to implementation with a number of events, and on the other end of the spectrum, the Forever Club became more active with a special event on Founders' Day.
- Implemented a PACE study of communications and public relations staffing, organization and effectiveness across campus. Resulted in a set of ten recommendations to enhance the efficiency and effectiveness of communications at NC State. The University is in the process of implementing many of the recommendations.

B. Volume of Activities

- Completed a wealth screening of 200,000 records in Advance. Identified and rated over 3,200 prospects this year – more than the combined total for all previous years.
- Completed 180 research reports, and added over 5,000 entity notes in Advance on current and potential prospects.

- Recognized 109 new Lifetime Giving Society memberships, with 59 members reclassified into higher giving societies.
- Processed over \$1MM in corporate matching gifts, exceeding the previous year-to-date total by 25%.
- Prepared over 350 acknowledgement letters for either the Chancellor or Vice Chancellor, and 758 endowment stewardship reports.
- The Alumni Association sponsored 141 registered events attended by 9,883 alumni, family and friends. An estimated 60,000 people attended 134 non-registered events. In total, the Association participated in 275 events, or an event every 1.3 days in 2008-2009. Our newly established networks sponsored 38 senior send-offs (with an approximate 25% increase in attendance).
- Produced more than 100 feature and multimedia stories on the NC State website, which garnered more than 20 million visitors and 35 million page views during the past year.
- More than 5,600 media placements during the year, including The Economist, Wall Street Journal, The New York Times, USA Today, Reuters, CNN, Times of London, Chicago Tribune, Los Angeles Times, Wired and other significant national media placements.
- Created a Twitter media account that is now followed by more than 400 media and others.
- With the assistance of LGA, produced two television broadcast spots (Gateway and Speedbump). The spots ran at home football and basketball games, and regionally in primetime placements. For the time period February - May 2009, the two spots ran regionally 107 times with 7,074,594 households viewing the spots. For the time period

September-November 2008, the Gateway ad ran 51 times in a regional market with 2,790,684 households viewing the spot.

- Due to implementation of best practices in gift accounting and the worse giving environment since the 1970s, gift receipts and new commitments are down substantially from the previous year. If we control for non-repeatable gifts, the decline is more in-line with percentage losses being reported by peer institutions. As of June 30, 2009, gift receipts were down 15%, from \$105.2 million in 2007-08 to \$89.4 million in 2008-09. Gifts and new commitments, at \$90.8 million in 2008-09 are down by 35.2% when compared to 2007-08, the last year of the Achieve! Campaign, when the University recorded gifts and new commitments of \$140.2 million. The bright spot is the growth of the Annual Giving program, which saw an increase in both dollars and donors.

II. Compact Plan: Major Initiatives

In preparation for the next campaign:

- Developed and promulgated the first NCSU document to outline Best Practices in Relationship (prospect) Management and new Standard Operating Procedures for Acceptance of gifts, addressing all national regulations and best practices.
- Established a new POL, 3.00.3: Gifts – University Acceptance of Private Donations.
- Made significant progress on the conversion of Advance to an Oracle platform including the completion of two rounds of data conversion and testing.
- Re-established 37 regional alumni networks. Designed, developed and implemented the “Red and White For Life” blog for the Alumni Association.
- Working with LGA, implemented an integrated marketing and media relations campaign to elevate the image and change perceptions of North Carolina State University.
- Successfully introduced the new Brand Book.

III. Diversity: Initiatives and Progress

- The Alumni Relations and Alumni Association continue to support the NC State Black Alumni Society (BAS) and the American Indian Society. The Black Alumni Society had its largest tailgate in five years during Homecoming 2008.
- Developed a long term Affirmative Action Plan for University Advancement that commits to building a pipeline of diverse applicants to enter into the advancement profession with emphasis on recruiting, hiring, retaining, and developing diverse talent.
- Arnette Ejire attended the CASE Minority Advancement Institute to gain a better understanding of the challenges facing development professionals of color and to support University Advancement's strategy to attract greater diversity into the profession.
- Interviewed five African Americans as finalists for Executive Director positions in Development and the Associate Vice Chancellor for University Communications position.

IV. Staff

Major New Appointments

- John Taylor, hired as Associate Vice Chancellor for Advancement Services
- Ann Horner, hired as Executive Director of Annual Giving
- Juliette Ciani, hired as Executive Director of Development for the College of Textiles and the NC Textile Foundation
- Pamela Cardoza, hired as Executive Director of Development for the College of Education.
- Stephanie Hlavin, promoted to Interim Director, Creative Services

V. Kudos, Professional Activities and Recognition

The alumni magazine, NC State, and its staff garnered numerous awards in 2008-09. The list includes:

- An Award of Excellence from the Council for the Advancement and Support of Education (CASE) District III in the Alumni Magazines II category, comprising magazines for southeastern universities with enrollments of more than 5,000 students.
- A gold award in the “Print-Hybrid Audience” category in publications’ competition sponsored by the League of American Communications Professionals Inspire Competition. The magazine was ranked 19th out more than 400 entries in multiple categories.
- A bronze award for Cherry Crayton, the magazine’s assistant editor, from the national CASE competition in the Best Articles of the Year: Higher Education category. The article featured alumnus Chuck Gardner and his efforts to find a cure for autism.

University Communications received the following awards in 2008-09:

- 15 CASE Regional III awards. They included 1 Grand Award, 10 Awards of Excellence and 3 Special Merit Awards. Awards of Excellence for the following: Public Affairs Program Red Means Go; Admissions Campaign-school.future.life.; Achieved Campaign; Paid Advertising Series Red Means Go; Annual Report (2 Awards of Excellence); External Tabloids and Newsletters Results; Photography; Television Gateway Ad; Films and Video Tapes -Achieved!, and the 2007 Annual Report HTML email, video and companion Web site.
- Five ADDY awards, including a Best in Show for the Red Means Go Campaign, beating out 441 entries from 71 agencies. The five awards were for: Red Means Go, Mixed-

Media; Best of Show Broadcast TV for the Gateway and Speedbump TV Spots; and National Radio for the Pause Button.

- The 2008 Chancellor's Report – Red Means Go – was awarded the 2009 Gold Medal Circle of Excellence Award for In-House Publications in May 2009. There were 55 entries and with only two gold medals awarded.
- NC State's Web presence named one of the "Top 10 Stickiest Brands at Home and Work" in both January 2009 and April 2009 by Nielsen Online/NetRatings.
- NC State web-site (ncsu.edu) featured in EduStyle's "Usable Higher Ed Homepage Design" book.
- Web Communications was awarded the 2009 Advocate Award by the Center for Leadership, Ethics & Public for outstanding dedication to its mission and students.

Other Kudos, Professional Activities and Recognition

- Erika Roe, Matching Gifts Manager, graduated from the NCSU Pathways program. Her final project was the redevelopment of the Advancement Services website.
- Executive Director of the NC State Alumni Association, Dr. Lennie Barton chaired the annual conference for the Council for Alumni Association Executive Directors (CAAE) in Chicago.
- Steve Watt, Executive Director for Gift Planning, and Sonia Murphy, Director of Planned Giving for the College of Agriculture and Life Sciences, both received Silver Awards from Crescendo for their on-line education, information, and marketing of planned giving.

- Dwain Teague, Director Development for the NC State Libraries, co-authored an article titled “Reconnect with your Alumni and Connect to Donors.” The article was published in *Technical Services Quarterly*.

V. Recommendations and Concerns for the Future

- The NC State brand was damaged by the fall-out from the Mary Easley hiring. In the coming year, the entire community must work together to restore the confidence of stakeholders in the University and its leadership. This process will be led by Chancellor Woodward, and actively supported by University Communications and the rest of the communicators at NC State. Key to our success will be the leadership provided by the new Chief Communications Officer, a search currently underway. The PACE review recommendations need to be implemented in 2009-10 to realize the University’s potential to communicate with openness and transparency, in a manner that’s forward-looking.
- The greatest challenge facing University Advancement and NC State is the insufficient level of investment in development and advancement services. A long-range funding model in preparation for the next campaign needs to be adopted in 2009-10, so that the hiring and training of new staff can begin now.
- NC State has for too long relied on a relatively small group of major donors for its support. Implementation of the new Relationship Management program should assist all development officers in focusing their time and efforts on the activities that have the greatest potential for return on investment. This shift will be challenging, and will require the support of senior leadership across the university, including the entities.