

University Advancement 2010- 2011 Annual Report

I. Programs

A. Changes in Scope of Activity and Special Achievements of Significance

- Made significant new investments in the capacity of University Advancement and the advancement functions across the institution to launch the silent phase of the next campaign. The new assessment fees have generated \$1.5 million in net new revenue as of May 31, 2011. This new infusion of capital allowed University Advancement to retain Ruffalo Cody to increase the productivity of our Annual Giving phone program, hire two new regional major gift officers, rebuild our central corporate and foundation relations team, and make other strategic hires which have contributed to significant growth in gift revenue in FY' 11.
- Efforts to change the culture of fund raising at NC State are starting to show results. With an improved economy, and more focus of fund raisers on major gift fund raising, NC State is expected to have one of its strongest years of fund raising in recent history.
 - In December 2010, NC State University received its largest gift ever from Lonnie and Carol Poole to name the Poole College of Management. The \$40 million gift additionally provided the lead gift to name the Carol Johnson Poole Clubhouse at the Lonnie Poole Golf Course, as well as a named endowment in CHASS.
 - Through May 30, 2011, NC State has received \$94.4 million in gifts and new commitments, representing a 47% increase over the same period last year. Of that total, \$44.4 million was received from alumni and approximately \$32.5 million was directed towards growth of the endowment. Through the same period, gift receipts stood at \$82.4 million, a 19% increase over the same period last year.

- Annual Giving has experienced significant gains in both donors and gifts during the fiscal year. Through May 30, 2011, the University has received slightly more than \$1.3 million in gifts through the program. This total not only surpasses the annual goal of \$1.2 million a month ahead of schedule, but also represents a 47% percent increase over the same period last year. Total donors through the program are up 45%, at 12,750, with alumni donors closing in on 10,000 – a 52% increase.
- Development officer's face to face visits with donors and potential major gift donors are up 73% over the same period last year.
- The highest priority for University Advancement in FY'11 and beyond is to increase the active engagement of NC State alumni in the life of the institution. Chancellor Woodson hosted regional alumni events, and conducted principal and major gift donor and potential donor visits in Washington, DC, New York City, Atlanta, San Francisco, San Jose, Richmond, Norfolk and Orlando. He also hosted events in North Carolina, including Asheville, Fayetteville, Winston-Salem, Charlotte, Wilmington, and Greensboro. Enhanced collaboration between the Alumni Association and University Development was key to the success of this program.
- University Communications provided strategic communications consultation, planning, and implementation for critical University initiatives including:
 - Installation of NC State's 14th Chancellor
 - Undergraduate Admissions marketing strategy which resulted in a 40% increase in early action among admitted out-of-state students who intend to enroll.
 - Comprehensive communication plan for strategic plan.

- Comprehensive communication plan for the university’s strategic realignment plan, including media training in preparation for a *News and Observer* editorial board visit, resulting in a very positive editorial.
- Made significant progress on a number of initiatives in Advancement Services that have impact across the division and campus including:
 - Upgraded SunGard Advance to the most current version available, and began a major project to convert to Advance Web
 - Implemented an annual automated process for loading new students and their parents into SunGard Advance
 - Completed the 3-year initiative to research and rate 10,000 donors and potential donors. Current count of households with the potential to make a major gift is over 13,000.
 - Greatly enhanced the online giving site, contributing to a record number of credit card donations for a single month (1,091 in December 2010)
- Provided leadership to NC State’s record breaking State Employees Combined Campaign. The newly branded “Wolfpack Gives Back Campaign” raised over \$576,770, the highest amount raised in the history of NC State. The participation rate of 35.4% was the second highest rate of participation in the history of the campaign at NC State, and the highest since 2001.

B. Volume of Activities

- Compiled and sent 889 endowment stewardship reports prepared for 738 funds on behalf of 5 different entities.
- Maintained 97.1% contact rate (mail) for undergraduate alumni, putting NC State among the top-tier of universities in the country.

- Processed 6,509 gift/pledge transactions in December 2010, largest number ever recorded in a single month.
- Exceeded 400,000 total records in Advance for the first time, representing a 10% growth in one year.
- University Communications launched the official NC State University Fan Page on Facebook in August 2010. In the past year, the page has seen a 111% increase in user “Likes” (11,351), 3.5 million post views, and garnered more than 22,000 fans.
- The Alumni Association sponsored more than 110 registered events attended by more than 12,000 alumni, family and friends. An estimated 30,000 people attended 130 non-registered events.
- Traffic to the Alumni Association’s revamped redandwhiteforlife blog was up 22% in April 2011 and visits by new readers increased by 84%. As of April 2011, over 7,000 have “friend” the Alumni Association Facebook page, with active use of the Facebook page increasing rapidly.
- More than 5,000 media placements during the year, including ABC News, BBC News, Businessweek, CBS News, Christian Science Monitor, Chronicle of Higher Education, CNN, Discovery, the Economist, Forbes, Fox News, New York Times, The N&O, Wall Street Journal, and other significant national media placements.
- Produced more than 100 feature and multimedia stories on the NC state website, which garnered more than 15 million visitors (23% new visitors) and 25 million page views during the past year.

II. Major Initiatives

- Working closely with chief development officers across campus, instituted increased minimum endowment levels to align with peers, and implemented new policies that reflect current best practices for naming facilities and programs.

- Through a partnership with the Office of Information Technology, reorganized support for Advance, stream-lining the reporting structures, enhancing productivity, and realizing over \$300,000 per year in cost savings.
- In collaboration with the Wolfpack Club, University Advancement implemented a plan to capture an accurate alumni participation rate, the first time in the history of NC State. The good news is the Annual Giving program has witnessed an increase of 52% in the number of alumni donors – up 3,246 year to date. Our reported alumni participation rate for FY’11 will have 1,800 fewer unique alumni donors to the Wolfpack Club than we estimated in previous years.
- Began implementation of a suite of location-based services tools designed to improve engagement with current students, faculty, staff and alumni. The project, called “On Campus” has earned national attention for its innovative approach to mobile and social technology, and has positioned NC State University as a national thought leader in web communications. The project has been featured in *CASE Currents*, *University Business*, and the book *Clout: The Art and Science of Persuasive Content*.
- Improved faculty and staff engagement through evolution of the *Bulletin* online; doubled page visits in FY’11. Revitalized the Faculty and Staff web page using syndicated content from the *Bulletin*.

III. Diversity: Initiatives and Progress

- Two of the four positions for which University Communications recruited in FY’11 were filled by female minority candidates.
- University Communications provided a complete re-design of the Diversity online presence that aims to unify Diversity efforts and messaging across campus.

- The Alumni Association continues to support a diversity of constituent groups, including the NC State Black Alumni Society, the NC State American Indian Society, and the Hispanic and Latino Advisory Group. The Black Alumni Society celebrated its 31th anniversary with its largest ever Homecoming tailgate, attended by more than 600 people.
- Our outreach to diverse communities goes well beyond the State of North Carolina. Associate Vice Chancellor John Taylor coordinated a CASE service project to improve conditions at a high school in the Ninth Ward of New Orleans, a low income area devastated by Hurricane Katrina.

IV. Staff

A. Major New Appointments

- Jason Gipe, Associate Executive Director of Membership Services, NC State Alumni Association
- Taylor Jeffreys, Director of Finance and Administration Management, University Advancement
- Minnie Bridgers, Director of Marketing Communications and Web Strategy, NC State Alumni Association
- Ellen Richardson, Director of Outreach and Engagement, NC State Alumni Association
- Sylvia Adcock, Editor, *NC State*, NC State Alumni Association

B. Kudos, Professional Activities and Recognition

- News Services staff member Matt Shipman received one of five university Awards for Excellence.
- A 2010 Silver Inspire Award for Excellence was awarded by the League of American Communication Professionals (LACP) for *NC State*. It was pitted against 425 entries, comprising print, video and web materials and campaigns from eight countries. The magazine earned a total

score of 98 out of a maximum of 100 points. The recognition also earned *NC State* a place in the Top 50 entries judged by LACP, with a ranking of 32.

- CASE District III Awards in FY' 11 included:
 - Award for Excellence, Chancellor's Annual Report, University Communications
 - Award for Excellence, website implementation, Homecoming 2009 homepage coverage, University Communications
- Regional EMMY, *In the Garden with Bryce Lane*
- NC State's Homecoming homepage coverage featured in *Clout: The Art and Science of Persuasive Content* (pp. 192-3)
- NC State's Chancellor's Visits website and location-based services project featured in Case Study, *Clout: The Art and Science of Persuasive Content* (pp. 205),
- Associate Vice Chancellor John Taylor was elected to the Council for Advancement and Support of Education (CASE) Commission on Philanthropy, the first representative of NC State to serve on a CASE board in 15 years.

V. Recommendations and Concerns for the Future

- Additional investments in University Advancement will be necessary to successfully complete a \$1.5 billion campaign, heavily focused on endowment. With expectations for a continuation in declining support from the state, and limits on new revenue sources, additional resources will need to be reallocated to support the Advancement programs at NC State. We need to hire at least 3-4 additional fund raisers, an Assistant Vice Chancellor for University Development to lead central development functions, more IT, prospect research, gift processing personnel, and a campaign communications group. In addition, the top team of professionals that we have attracted to NC State over the last 3.5 years, will not stay indefinitely, without salary increases.

- Until all executives with fund raising responsibilities are held accountable for the activities and success of their respective fund raising units, NC State will continue to underperform its potential. At 6 per month, we continue to significantly trail our benchmarked peers in the average number of face-to-face visits per month that our fund raisers conduct and document. This number must double in FY' 12, and that can happen only if the deans and entity heads make major gift fund raising a priority, and hold their development officers accountable for the results.
- Just as we have found new ways to generate funds to support development and advancement services at NC State, we must develop a long-term plan to fund our marketing and communications efforts. Historically, this has not been a priority for the University, and our national reputation has suffered as a result.
- Alumni are one of the most important constituencies in spreading the word about the success of NC State. To do that more effectively, and nationally, we must develop stronger regional alumni networks, and provide them with a value proposition. This will also be key to growing membership in the Alumni Association, and dues revenue. Despite limited resources, the University must make additional investments in regional alumni officers in FY' 12.
- To allow for stream-lined and more effective and cost efficient solicitation of gifts, we must explore best practices for processing gifts for our affiliated entities and the University that will allow for comingling of those funds through a single bank clearing account.