NC State University
Campaign Update

Board of Visitors
April 8, 2016
Themes for Today’s Presentation

• “Harnessing Momentum” – FY 16 Focus
• Campaign Update
• Key Deliverables & Campaign Kick-off Preparation
• Preview of Campaign Brand & Identity
Gifts and Pledges
FY 2010 – FY 2015

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Revenue</th>
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<tbody>
<tr>
<td>FY 2010</td>
<td>$89,438,521</td>
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<td>FY 2011</td>
<td>$106,853,332</td>
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<td>FY 2012</td>
<td>$111,364,891</td>
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<tr>
<td>FY 2013</td>
<td>$202,602,856</td>
</tr>
<tr>
<td>FY 2014</td>
<td>$187,110,517</td>
</tr>
<tr>
<td>FY 2015</td>
<td>$208,473,272</td>
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</table>
Growth in Endowment

FY 2010 – FY 2015

Driven by new gifts and strong investment performance
<table>
<thead>
<tr>
<th></th>
<th>Alumni</th>
<th>Parents</th>
<th>Faculty Staff</th>
<th>Other Individuals</th>
<th>Corporations</th>
<th>Foundations</th>
<th>Other Organizations</th>
<th>Year-to-date FY'16 Totals</th>
<th>Year-to-date FY'15 Totals</th>
<th>VTD % Change FY15/16</th>
<th>Year End FY'15 Totals</th>
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<tr>
<td>CALS</td>
<td>$1,904,597</td>
<td>$37,432</td>
<td>$689,291</td>
<td>$3,288,553</td>
<td>$6,118,544</td>
<td>$738,226</td>
<td>$3,616,317</td>
<td>$16,392,959**</td>
<td>$30,713,691</td>
<td>-47%</td>
<td>$57,263,208</td>
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<td>Design</td>
<td>$225,174</td>
<td>$12,732</td>
<td>$3,206</td>
<td>$13,415</td>
<td>$220,545</td>
<td>$14,175</td>
<td>$8,150</td>
<td>$497,398</td>
<td>$760,380</td>
<td>-35%</td>
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<td>Education</td>
<td>$98,484</td>
<td>$2,440</td>
<td>$3,763</td>
<td>$241,613</td>
<td>$126,332</td>
<td>$425,778</td>
<td>$82,000</td>
<td>$980,411</td>
<td>$692,377</td>
<td>42%</td>
<td>$1,811,131</td>
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<td>Engineering</td>
<td>$14,942,153</td>
<td>$28,387</td>
<td>$136,945</td>
<td>$329,076</td>
<td>$2,325,988</td>
<td>$3,309,775</td>
<td>$322,811</td>
<td>$21,395,136</td>
<td>$6,794,028</td>
<td>215%</td>
<td>$21,741,828</td>
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<td>Humanities &amp; Social Sciences</td>
<td>$3,828,035</td>
<td>$514,185</td>
<td>$20,555</td>
<td>$22,731</td>
<td>$52,881</td>
<td>$48,313</td>
<td>$6,019</td>
<td>$4,492,719</td>
<td>$8,900,186</td>
<td>-50%</td>
<td>$9,353,847</td>
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<td>Management</td>
<td>$796,379</td>
<td>$43,053</td>
<td>$2,917</td>
<td>$276,922</td>
<td>$334,103</td>
<td>$40,061</td>
<td>$66,242</td>
<td>$1,559,676</td>
<td>$1,897,937</td>
<td>-18%</td>
<td>$5,708,217</td>
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<td>Natural Resources</td>
<td>$549,243</td>
<td>$3,142</td>
<td>$8,900</td>
<td>$516,671</td>
<td>$181,260</td>
<td>$103,208</td>
<td>$90,543</td>
<td>$1,452,967</td>
<td>$1,643,616</td>
<td>-12%</td>
<td>$2,688,374</td>
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<tr>
<td>Sciences</td>
<td>$1,707,333</td>
<td>$104,686</td>
<td>$116,588</td>
<td>$322,283</td>
<td>$1,035,721</td>
<td>$662,159</td>
<td>$19,465</td>
<td>$3,968,235</td>
<td>$4,421,016</td>
<td>-10%</td>
<td>$6,990,751</td>
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<tr>
<td>Textiles*</td>
<td>$171,267</td>
<td>$4,580</td>
<td>$28,462</td>
<td>$8,980</td>
<td>$118,633</td>
<td>$502,300</td>
<td>$100</td>
<td>$834,322</td>
<td>$1,058,364</td>
<td>-21%</td>
<td>$3,812,168</td>
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<td>Veterinary Medicine</td>
<td>$387,274</td>
<td>$48,384</td>
<td>$17,876</td>
<td>$3,561,634</td>
<td>$224,129</td>
<td>$1,128,572</td>
<td>$169,653</td>
<td>$5,537,522</td>
<td>$4,463,542</td>
<td>24%</td>
<td>$33,023,890</td>
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<td>Alumni Association</td>
<td>$235,415</td>
<td>$2,475</td>
<td>$1,188</td>
<td>$38,860</td>
<td>$13,082</td>
<td>$51,424</td>
<td>$3,249</td>
<td>$345,693</td>
<td>$649,668</td>
<td>-47%</td>
<td>$816,246</td>
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<td>DASA</td>
<td>$167,627</td>
<td>$59,743</td>
<td>$20,399</td>
<td>$263,202</td>
<td>$54,550</td>
<td>$243,350</td>
<td>$5,553</td>
<td>$814,424</td>
<td>$1,661,821</td>
<td>-51%</td>
<td>$3,341,831</td>
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<tr>
<td>Libraries</td>
<td>$96,800</td>
<td>$16,955</td>
<td>$160,616</td>
<td>$1,436,847</td>
<td>$86,797</td>
<td>$84,400</td>
<td>$1,600</td>
<td>$1,866,016</td>
<td>$1,150,338</td>
<td>64%</td>
<td>$2,521,372</td>
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<tr>
<td>University-wide</td>
<td>$1,464,466</td>
<td>$93,966</td>
<td>$1,200,106</td>
<td>$189,384</td>
<td>$1,648,862</td>
<td>$3,655,848</td>
<td>$106,559</td>
<td>$8,359,190</td>
<td>$9,499,247</td>
<td>-12%</td>
<td>$25,140,288</td>
</tr>
<tr>
<td>Wolfpack Club/Athletics**</td>
<td>$12,937,365</td>
<td>$1,000</td>
<td>$0</td>
<td>$535</td>
<td>$108,988</td>
<td>$32,200</td>
<td>$1,550</td>
<td>$13,081,639</td>
<td>$12,531,082</td>
<td>4%</td>
<td>$32,199,454</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$39,513,613</strong></td>
<td><strong>$973,159</strong></td>
<td><strong>$2,410,813</strong></td>
<td><strong>$10,510,706</strong></td>
<td><strong>$12,650,414</strong></td>
<td><strong>$11,039,789</strong></td>
<td><strong>$4,499,812</strong></td>
<td><strong>$81,598,307</strong></td>
<td><strong>$86,787,294</strong></td>
<td><strong>-6%</strong></td>
<td><strong>$208,473,272</strong></td>
</tr>
</tbody>
</table>
Campaign Contributions by Giving Range

As of February 16, 2016

Total Campaign Commitments
$804.5 Million
Endowments
Overall
As of June 30, 2015

Your Support
BY THE NUMBERS
Endowments

- 2543 Total Number of Endowments
- 11.2% Market Value Increase

Student Support

- 72 Funds Created
- 8.9% Market Value Increase
- $375M Total Endowment Market Value

Faculty Support

- 13 Funds Created
- 15% Market Value Increase
- $175M Total Endowment Market Value

Total Endowment Market Value:

- $984M

- 155 Total Funds
- $175M Total Endowment Market Value
Endowments
Faculty Support
As of June 30, 2015

Your Support

BY THE NUMBERS

Faculty Support

32
Total Funds
10.8%
Market Value Increase

$8.1M
Total Endowment Market Value

Professorships

123
Total Funds
15.2%
Market Value Increase

$175 M
Total Endowment Market Value

$166.9M
Total Endowment Market Value
As of June 30, 2015

**Your Support**

**BY THE NUMBERS**

**Student Support**

- **1627** Total Student Support Endowments
- **8.9%** Market Value Increase

- **$375 M** Total Endowment Market Value

**Undergraduate Support**

- **1483 Total Funds**
- **8.7%** Market Value Increase

- **$346 M** Total Endowment Market Value

**Graduate Support**

- **144 Total Funds**
- **9.9%** Market Value Increase

- **$28.9 M** Total Endowment Market Value
Campaign Giving
As of: December 31st
Campaign Commitments by Use

As of December 31, 2015

Total Campaign Commitments
$804.5 Million

- Endowment: $433.54M
- Facilities: $73.28M
- Current Operations: $297.73M
Campaign Commitments by Source
As of December 31, 2015

Total Campaign Commitments
$804.5 Million

- Alumni: $341.8M
- Foundations: $185.07M
- Corporations: $105.65M
- Other Individuals: $103.44M
- Other Organizations: $34.11M
- Parents: $20.75M
- Faculty Staff: $13.74M
Campaign Giving
As of: February 17th
$824M vs. $756M (as of October 31st)
Campaign Progress Timeline

Campaign Contribution

Sep 30, 2013
$416M
$441.5M
$519.4M
$557.7M
$615.9M
$641.5M
$693.8M
$737.5M
$755.2M
$805.7M
$824M

Feb 17, 2016

2013 Q3
2013 Q4
2014 Q1
2014 Q2
2014 Q3
2014 Q4
2015 Q1
2015 Q2
2015 Q3
2015 Q4
2016 Q1

$1B
$800M
$600M
$400M

NUCLEUS PHASE
10 Key FY16 Campaign Deliverables

1. Secure at least 60% of Campaign Goal ($900M)

2. Determine Campaign Sub Goals & Featured Objectives

3. Finalize & Standardize Campaign Reports

4. Recruit Campaign Volunteer Leadership
   - Volunteer Leadership Summit—Thursday June 16 – Friday, June 17 at The Umstead

5. Plan for October 23-30, 2016 Kick-off Event(s)
10 Key FY16 Campaign Deliverables

1. Secure at least 60% of Campaign Goal ($900M)

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10 Key FY16 Campaign Deliverables

6. Develop Campaign Branding & Marketing Materials

7. Qualify TBD # of Major Gift/Leadership Gift Prospects

8. Develop Stewardship Plans & Activities

9. Create Internal Campaign Operations Workgroup (C.O.W.)

10. Have Fun and Stay Sane!
### Campaign Cabinet

**Executive Committee**

- **Jimmy and Vickie Clark**
  - Co-Chairs
- **Lawrence and Sara Davenport**
  - Co-Chairs
- **Jim and Ann Goodnight**
  - Co-Chairs
- **Lonnie and Carol Poole**
  - Co-Chairs
- **Randy Woodson**
  - Chancellor
- **Warwick Arden**
  - Provost
- **Brian Sischo**
  - VC, University Advancement
- **Francine Cronin**
  - AVC, University Development
- **James Owens**
  - Chair, Board of Trustees
- **Jimmy Clark**
  - Chair, Advancement Committee

**Colleges**

<table>
<thead>
<tr>
<th>College</th>
<th>Volunteers</th>
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<tbody>
<tr>
<td>CALS</td>
<td>Rich Linton, Keith Oakley, De Tangue</td>
</tr>
<tr>
<td>COE</td>
<td>Louis Martin-Vega, Brian Campbell, Lora Bremer</td>
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<tr>
<td>COS</td>
<td>William Ditto, Rita Stallings</td>
</tr>
<tr>
<td>CHASS</td>
<td>Brad Brandy, Jeff Braden, Marcy Engler</td>
</tr>
<tr>
<td>CNR</td>
<td>Mary Watzin, Lara Brown de Fuenmayor</td>
</tr>
<tr>
<td>COT</td>
<td>David Hinks, Suzanne Weiner</td>
</tr>
<tr>
<td>PCOM</td>
<td>Ira Weiss, Anya Reid</td>
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<tr>
<td>CVM</td>
<td>Paul Lunn, Dianne Dunning, Allison Crouch</td>
</tr>
<tr>
<td>COD</td>
<td>Steve Schuster, Art Rice, Carla Abramczyk</td>
</tr>
<tr>
<td>CED</td>
<td>Mary Ann Danowitz, Paul Ricardi</td>
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**Units**

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<tr>
<th>Unit</th>
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<tr>
<td>MIKE HOLMQUIST</td>
<td>Mike Mullin, Nicole Peterson</td>
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<tr>
<td>VOLUMEEER</td>
<td>Maureen Grasso, Steve Couch</td>
</tr>
<tr>
<td>VOLUMEEER</td>
<td>Vacant</td>
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<tr>
<td>VOLUMEEER</td>
<td>Ann Horner</td>
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<tr>
<td>VOLUMEEER</td>
<td>Alan Taylor</td>
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<tr>
<td>VOLUMEEER</td>
<td>Renee Bush</td>
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<tr>
<td>VOLUMEEER</td>
<td>Alan Rebar, Lorena McLaren</td>
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<tr>
<td>VOLUMEEER</td>
<td>Faculty/Staff Giving</td>
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<tr>
<td>VOLUMEEER</td>
<td>Corp Fndtn Relations</td>
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<tr>
<td>DASA</td>
<td>Graduate School</td>
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<td>Planned Giving</td>
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<td>Annual Giving</td>
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<td>Central Major Gifts</td>
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<td>Libraries</td>
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<td>Students</td>
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<tr>
<td>Alumni</td>
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<tr>
<td>Faculty</td>
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<td>Staff</td>
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**University Development**

<table>
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<th>Development</th>
<th>Volunteers</th>
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<tr>
<td>Voluntary</td>
<td>Ruben Carbonell, Kelly Vogel</td>
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<td>Saundra Williams, Amy Cirrasta</td>
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<td>Endowment</td>
<td>Kenan Institute</td>
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<td>Voluntary</td>
<td>James Owens, Mary Pellican-Dodd</td>
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<td>Jerry Jackson, Vacant</td>
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<td>Charles A. Fink, Kevin Howell</td>
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<td>Volunteers</td>
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<td>Janice Odom, Keleigh Smith</td>
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<td>Cathy Fellers</td>
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<td>Park Scholarships</td>
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<td>Alumni Association</td>
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<td>Volunteers</td>
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<td>Tom Miller, Vacant</td>
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<td>Entrepreneurship</td>
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<td>Debbie Yow, Bobby Purcell</td>
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**Notes:**

- Confidential Draft As of: 02-16-16
Campaign Kick-off Week
October 23-30, 2016


- Friday afternoon/evening, October 28, 2016 – Homecoming Parade and Related College/Unit Celebrations.

- Friday night, October 28, 2016 – Campaign Kick-off. Invitation Only.

- Saturday, October 29, 2016 – Football Game vs. Boston College.
Campaign Kick-off Week
October 23-30, 2016

- Foundation Boards
- Scholarship Events
- Faculty Recognitions
- Student Engagement
- Anything that will elevate the celebratory nature of the week and provide additional incentives to be on campus for other exciting events!
Campaign Operations Workgroup (C.O.W.)
1. Communications & Marketing
2. Events
3. Prospects/Pipeline
4. Reports
5. Stewardship
6. Volunteer Leadership Management
Campaign Operations Workgroup (C.O.W.)

- Critical to Successful Completion of Campaign
- Engage Advancement/Development Staff & Others in Campaign Execution
- Ensure Key Duties are Being Planned For & Managed
- Align Deliverables with All Aspects of Campaign Operations
Campaign Communications Overview

Game-Changing Impact

A generous new commitment from Randy and Tiffany Ramsey will support the Wolfpack Club and College of Veterinary Medicine.

Read More →

GIVING NEWS | More Stories

2016 Watauga Medal Honors Two for Service

Donation Will ‘Accelerate’ Student Startups
Built on a Strong Foundation

- Brand implementation
- Campaign preparedness work
- Highlighting the “Power of Philanthropy”
- “Best Year Ever” in fundraising
Sought Outside Expertise

• Lead a collaborative, consensus-building effort to recommend campaign identity, categories and key messages
• Test recommended identity, categories and key messages
• Conduct a development communications audit
• Work with Campaign Communications Leadership Team on creation of a Campaign Communications Plan
Already Completed

- Contracted with SimpsonScarborough to assist with Campaign Communications
- Three in-person and several virtual visits
  - Meetings, forums and focus groups
- Online Focus Groups
- Qualitative Research
- Quantitative Research
ALUMNI AND DONOR RESEARCH
• **Next Steps**

  • Mid-April – NC State provides final feedback on Campaign name, themes and messaging

  • Late-April – SimpsonScarborough to present final Campaign name, messaging, research, etc.

  • Mid-May – SimpsonScarborough delivers Campaign Communications Plan, Creative Concepts, Budget, Timeline and additional Recommendations
Questions?