



University Advancement Annual Summary of Accomplishments
Fiscal Year 2018-19

A Year of Thinking and Accomplishing Big

NC State is the university of choice for people who want to make a difference. Our unique environment is where innovative ideas become powerful solutions. This university unites bold thought with purposeful action to overcome society's grand challenges and make the world a better place. Across our campus and well beyond, we think big and get big things done. Nowhere is that more apparent than in University Advancement.

NC State University is experiencing unprecedented momentum and success in large part due to the exceptional work across Advancement's areas of Development, Advancement Services, Communications and Marketing, and the Alumni Association. Throughout the 2018-19 fiscal year, the University Advancement team worked collaboratively across our departments and across campus to fuel NC State's immensely upward trajectory and help the university move closer to achieving its remarkable potential.

A handful of examples of accomplishments follow.

Leapfrog – Strategic Plan Roadmap

A key factor in NC State's recent ascendancy is the visibility and impact generated from the *Think and Do the Extraordinary Campaign*. The Campaign's momentum is a visible representation of how a strategic and effective Advancement organization can elevate NC State to new levels of success and deliver tremendous benefits to colleges, units, students, faculty, staff and citizens throughout the state. Even with these accomplishments, it is clear we've just begun to tap our potential, in Advancement, and as a university.

Building on this momentum, leadership realized the time was ripe to pivot and aggressively pursue a strategic plan process that propels University Advancement to leapfrog to one of the very best advancement programs in the country. The University Advancement Five-Year Strategic Plan Roadmap emerged following a yearlong effort engaging with and drawing feedback from partners across the university, including executive officers, advancement staff centrally and in the colleges, key volunteers and a multi-disciplinary steering committee that includes deans, faculty and leaders from a variety of campus units.

The result is an overarching vision of establishing a "Constituent-centered Culture and Organization" and a commitment to effectively positioning Advancement to address three primary themes: 1) Achieving our Potential; 2) The Think and Do Advantage; 3) One Pack.

Most importantly, effective implementation of the Roadmap will empower University Advancement to elevate NC State, its colleges and its units to unsurpassed levels of impact and success. Outcomes can include, but will not be limited to, significant increases in annual fundraising totals; expansion of Alumni Association membership; elevated engagement of alumni and friends; heightened donor counts; stronger brand reputation; enhanced rankings; better staff retention; and greatly improved return on investment.

Strategic Plan implementation began near the end of the fiscal year with Advancement leadership approving the top 10 Roadmap Projects to complete in FY 2019-20.

Day of Giving

Led by Annual Giving, Advancement staff throughout the division collaborated with partners across the university to plan, launch and execute NC State's inaugural Day of Giving on March 27, 2019, and it was a phenomenal success.

In addition to the impressive amount of money raised, the effort advanced the NC State brand and generated great excitement and support among NC State alumni, faculty, staff, students and friends. Internally, the effort advanced pride-in-place across campus and solidified a new, previously unrealized level of teamwork within University Advancement departments as well as with colleges and units across campus.

Much of the strategy behind empowering Day of Giving success across the university was to frontload the work and provide campus partners with all the tools needed to effectively participate. Advancement staff created a landing page, videos, social media imagery, social media posts, e-mail scripts, toolkits (for internal staff and external ambassadors), content calendars, timelines and schedules, a stewardship plan, and guidelines to share with colleges and units to ensure a successful effort. Advancement team members also led trainings with partners on how to use the tools and best collaborate for an extraordinary day.

The team utilized the opportunity to expand the brand's creative execution through Day of Giving deliverables. They also created more than 500 personalized thank-you graphics that were shared with donors via Twitter, as well as more than 700 personalized thank you videos shared via email.

The results speak for themselves:

- University Advancement and its campus partners raised \$13,692,984 million dollars from 10,810 gifts to benefit all areas of the university.
- A total of 6,727 donors participated in the Day of Giving.
- The effort led to gifts from 2,367 new donors.

Also impressive are the Social Media results that drove the Day of Giving digital philanthropy strategy.

- The hashtag #GivingPack began trending in Raleigh and surrounding areas around 7 a.m. and continued as the number one regional Twitter trend until about 10 p.m.
- Day of Giving earned 3,521,222 impressions on content published by the Social Media Hub, or essentially a month's worth of impressions on one day.
 - More than 924,000 impressions came from Twitter, where we focused the bulk of our strategy.
- Every college that partners in the Social Media Strategy Hub won at least one Day of Giving Challenge.

Development and Fundraising

NC State was established with a critical mission: to create economic, societal and intellectual prosperity for the people of North Carolina and beyond. The ambitious, ground-breaking Think and Do the Extraordinary Campaign is empowering NC State to meet its mission in even bigger and bolder ways.

Since the Campaign's public launch in October 2016, the Wolfpack community's response has been passionate and record-setting. Gifts have come from 86,000 donors representing all 100 North Carolina counties, all 50 states and 66 countries. Giving toward the Campaign has created more than 1,500 new funds, benefiting students, faculty, programs and facilities. These funds have allowed NC State to create more than 550 new endowed scholarship and fellowship funds, providing better support students, and more than 80 new endowed faculty positions, allowing NC State more opportunity to recruit and retain top faculty.

Advancement's focused development efforts, working alongside partners from across the division and the university, drove another Extraordinary fundraising year. A few highlights follow.

- Gifts and new commitments totaled \$220 million.

- The highest fundraising totals in our university's history have been achieved the past three fiscal years, and fiscal year 2018-19 marked our third consecutive \$200 million-plus year at NC State.
- The Think and Do the Extraordinary Campaign ended the last fiscal year at \$1.53B, placing the university within \$70M of its campaign goal with more than two years remaining the Campaign.
- Planned gift commitments to NC State totaled \$52,270,585, representing an increase of nearly \$17 million over the previous year and 32% over the three-year average.
- The Annual Giving program saw donor counts rise from 21,468 to 25,245, an increase of 3,777 donors or 17.6%.
- Annual gifts to NC State grew by 3.12% to \$14,447,535.
- Based on strong fundraising and sound financial management, NC State's endowment has seen 158% growth since 2010 and by the end of last year surpassed 1.4 billion, placing it among the top 100 largest higher education endowments in the country.
- Established a Leadership Annual Giving program, hiring an Associate and Assistant Director. During its first fiscal year in operation, the LAG program generated 110 donor solicitations, 40 donor visits, 264 discovery contacts, \$189,750 in gifts proposed and \$35,626 in gifts granted.
- Recruited, offered and filled the new positions of Assistant Vice Chancellor for University Development and Associate Director for Pipeline and Strategy Development.
- Secured a \$28 million gift from Alumnus Frederick "Fred" Eugene Wilson Jr. and the Wilson family to name the Wilson College of Textiles.
- A group of generous supporters, led by Board of Trustee member Tom Cabaniss, joined together to honor the life and contributions of the late Jim Valvano by making a \$5 million pledge to name the arena in Reynolds Coliseum.
- Principal Gifts continued its focus on and elevated its success with prospect strategy meetings in partnership with the Assistant Vice Chancellor for University Advancement and included the Vice Chancellor, Associate Vice Chancellor for Development and each college or unit development team and their deans. Throughout the year they completed 34 meetings with 19 total development teams.
- Continued the focus and strategic thought behind development events held at The Point and elsewhere. Events focused on Campaign priorities inviting key donors and prospects to engage with each other, university leadership, faculty, staff and students.
 - Completed three development dinners at The Point which included Campaign Cabinet, Entrepreneurship ThinkTank, and the College of Veterinary Medicine. A fourth dinner was hosted offsite with several corporate partners.
- Chancellor Woodson and Vice Chancellor Sischo participated in 20 joint visits this past year with individual, corporation and foundation prospects. One visit with a principal prospect led to the transformational gift to name the Wilson College of Textiles.
- Vice Chancellor Sischo conducted 35 major and principal prospect visits.
- Chancellor Woodson and Vice Chancellor Sischo attended nine alumni engagement events throughout the country meeting with alumni and friends in Raleigh, Atlanta, Seattle, San Francisco, Greensboro, Charlotte, Wilmington, Washington DC, New Bern and Beaufort.
- Vice Chancellor Sischo's office was a leader in the honorary naming of the University Commons Building after alum Irwin Holmes, Jr. in collaboration with Athletics, Wolfpack Club, University Special Events, Division of Academic and Student Affairs, University Communications and College of Engineering.

- The Vice Chancellor’s Office, in collaboration with colleagues from central major gifts and development communications and stewardship, launched the Women in Philanthropy initiative. A leadership team of 43 women were identified and invited to participate in the development of this initiative.
 - Held two leadership team meetings and two smaller focus group meetings, of which approximately 36 women have attended one or more of the meetings.
 - A smaller task force was identified with four of the women taking the lead in identifying opportunities for these women and this initiative, to work toward their mission and goals in the upcoming fiscal year.

Alumni Relations

More than 220,000 living NC State alumni in North Carolina, throughout the nation and across the globe are the foundation of the university’s broad support. Actively engaging alumni to support this great university is critical to NC State’s Campaign and ongoing success. Throughout the year, the NC State Alumni Association inspired alumni and friends through a variety of engaging programs, events, activities and communications that ignited pride and helped NC State achieve its goals. Following are a few highlights.

- Continued to increase revenue generation for programmatic support to bring increased engagement value and relevance to alumni and friends. Three years ago, that amount was \$2.1 million - and today it is \$4.1 million, a 95% increase.
- Continued to deliver segmented, on brand marketing strategies to key demographics that significantly impacted membership and engagement.
- Drove a 13% increase in Lifetime Memberships with 448 new members in FY 2018-19, resulting in an additional \$250,000 plus available to invest.
- Grew the Student Alumni Association by 10% or 3700 total members, maintaining its status as the largest student organization on campus.
- Conducted the second Alumni Association Job Fair engaging 90 companies and 400 participants. The fair generated \$50,000 in revenue for the Alumni Association and more than 100 job offers (to date) for participants.
- Continued highly successful collaborative work with the Advancement central team to deliver well-attended, high quality events to support the Think and Do the Extraordinary Campaign despite having to cancel and reschedule eight marquee events due to weather challenges.
- Continued to increase support for constituency groups, especially the Black Alumni Society, including the BAS Homecoming Reunion incorporating 14 events over four days during Red and White Week.
 - Launched the BAS Fest during (Black Alumni Society Homecoming Tailgate). Attendance increased from 300 participants in 2017 to 1000 in 2018.
- Significantly promoted Day of Giving to all alumni and friends through an ambitious email and social media campaign. Also mobilized 14 alumni constituency network groups to participate in social media blitz leading up to and competition on the Day of Giving campaign.
 - One-day increase in current donors ranged from 17% to 174% among groups.
- Continued to increase affinity partner and sponsorship revenue through multi-channel marketing strategies.
- Held numerous signature events from Evening of Stars Gala to Legacy Lunch and Faculty Awards that engaged alumni and friends that raised awareness and value of the Alumni Association.
- NC State Magazine had its best showing in years in CASE District III competition, receiving recognition for Most Improved, Best Article of the Year and Best Photography Series among others.

- Increased financial resources for the Caldwell Fellows and programs through support of the Capital Campaign. Increased the individual award for each student from \$7,000 to \$8,000 for the next fiscal year.
- Added additional staff support with an outstanding Caldwell Fellow Alumnus.

These are just a few examples of the high achievement delivered by this amazing Alumni Association Staff. They continue to earn regional and national recognition for their outstanding performance bringing value and relevance to our alumni and friends across the state, country and world.

Advancement Services and Support

A best-in-class Advancement Services operation is critical for the success of the overall University Advancement operation. Advancement Services manages the university's alumni and donor records, directs research about donor opportunities, processes gifts and provides the backbone and infrastructure for University Advancement by overseeing business process analysis and implementation. The team's efforts foster NC State's most important relationships and enable all areas of University Advancement to be successful. A few highlights of the key strategic initiatives completed in FY 2018-19 follow.

- Building on the Campaign's momentum, Advancement Services participated in and led the five-year roadmap process to elevate University Advancement to its vision of a mature Constituent-Centric Culture and Organization.
- Several key donor-centered initiatives were successfully implemented this year.
 - New Pledge Management Procedures that resulted in an improved collection rate of pledges.
 - More than 3,000 Campaign branded Endowment Reports delivered to key NC State donors before the 2018 holiday season.
 - Launched the Distinguished Professorship dashboard to provide NC State leadership critical program updates on a regular basis.
 - Enhanced naming procedures and completed the design of naming database with the Architect's office.
- A number of significant development strategy projects were completed over the year.
 - The Prospect Development team completed an Advancement-wide portfolio scrub, GG+A wealth screening and comprehensive review of \$1 million + rated prospects.
 - In partnership with Development, Prospect Development and Information Services implemented a number of Prospect Pipeline initiatives including Active Management Protocol process, GG+A wealth screening (data export and import) and launch of Leadership Annual Giving.
 - A new platform called Reeher/Blackbaud FPM was launched for frontline fundraisers. It provides critical advancement and prospect data securely on mobile devices.
- With a goal of improved processing time and better accuracy of data, Advancement Services completed several projects including Digital Transmittal forms, NEW Cash management policy, improved SOP documentation for Gift Acceptance and the launch of a comprehensive employment append.
- One major achievement collectively for the Advancement Services team was the successful execution of the record-breaking Day of Giving project. In one day, the team processed about 1/3 of the total volume of gifts they normally process in a year.
- The collective effort of Advancement Service in support of Advancement initiatives leveraged data strategically and created many opportunities for purposeful engagement with NC State's key constituents.

- The productivity of routine operations in all Advancement Services areas remained high in Fiscal Year 2018-19 in support of the Campaign.
- Advancement Services made a key leadership team hire in Sharon Das to lead the Prospect Development unit. Sharon has hit the ground running and partnered with University Development in prospect and pipeline development projects.
- Two new positions were added in Advancement Services in the areas of Donor Services and Advancement Information Services. To streamline the training and onboarding of new staff, a position in Information Services was repurposed as the Advancement Services Training Coordinator.
- Advancement Services continued to develop the talent with thoughtful investment in professional development. Two team members participated in leadership training by CCL.
- Sarah Thomas served on the UNC GA Advancement Symposium 2018 planning committee and with her team presented on Gift Agreements and Naming Opportunities at this year's symposium at East Carolina University, Greenville.
- Karen Sims served as faculty for the CASE Gift Processing and Donor Records Workshop.
- Kushal Dasgupta served as the Faculty for the CASE Summer Institute for Advancement Services.

Talent Management

A commitment to hire, manage, develop and retain extraordinary employees is essential to Advancement's and the university's ongoing success. From attracting top talent to ensuring employee engagement and motivation to enhancing employee performance, Talent Management plays a critical role in Advancement's strategy, operations and ultimate performance, ensuring the strength of the organization's most important asset – its people.

It has been two years since the UA Talent Management Office was established at NC State. Based on key metrics, search results and anecdotal feedback, the overall impact across the division has been positive and the office continues to make significant progress on several fronts. Following are a few highlights from the last year.

- Talent Management's engagement with searches, both central and college/unit based, has increased in volume and by level of support. This is a reflection of the value that the office brings to the process in terms of consistency, best practices, being a key source for candidates and as trusted advisors.
 - Led and/or directed 12 key searches.
 - Served as a committee member and/or in an active support role in 11 important searches.
 - Served as a critical search resource for more than 15 additional searches.
- Thanks to referrals from colleagues, personal outreach and engagement (LinkedIn, conferences, etc.) the Talent Management team continues to build a bench of potential candidates for future openings and searches.
 - Completed more than 45 calls and conducted over 20 in-person meetings.
- Enhanced service in career counseling and manager consulting capacities for Advancement staff. In all interactions, the Talent Management team focuses on remaining employee-centric, manager-centric and/or organization-centric as the situation demands.
- Had more than 30 formal face-to-face career counseling and manager consulting related meetings, and many additional conversations that took place informally.
- Coordinated several training and professional development activities.
 - Plus Delta – facilitated 4th cohort and hosted two DFF Refresh Workshops.

- Coordinated Advancement's participation with CCL; sent 10 managers to the three and five day programs. Feedback was very positive.
- Implemented new search and onboarding process guides and templates that the office is now using with every search in University Development and sharing as a best practice to colleges and units across campus.
- Hosted an NC State booth at the CASE District III conference for the first time. Also hosted a networking reception resulting in over a dozen leads.
- Led the development and design of a frontline fundraiser Career Ladder.
- Developed a strategic partnership with Moss + Ross to assist with leadership level position sourcing and the evaluation of candidates (College of Agriculture / Engineering).
- Established a Development Associate position (first hire) that will lay the groundwork for future cohorts.
- Hired a new, full-time Talent Management Specialist.

Communications, Marketing and Events

Strategic, on-brand and impactful marketing, communications and events are critical in achieving Advancement and university strategic goals. Fiscal Year 2018-19 was a strong and impactful year for University Communications and Marketing across its areas of responsibility in Marketing Communications, University Relations, University Special Events, and Development Communications and Stewardship. Working collaboratively with partners across the university and inspired by University Advancement's "Leap Frog" strategic plan roadmap process, UComm's efforts helped drive new levels of accomplishment and success for Advancement and NC State. Following are a few highlights.

- Planned and executed a strategic Marketing Campaign that highlighted the NC State brand and its benefits through multiple channels to thought leaders across the state. Results included more than 40 million impressions, 80,000 site visits and thousands of positive engagements.
- Throughout the year, drove more than 100 million impressions and significant engagement through digital and print advertising, and many millions more via and broadcast channels
- Oversaw implementation of the university's first Unified Marketing and Communications Plan, a living document outlining the university's key messaging and strategic communications priorities – a significant step forward for consistent campus-wide marketing communications at NC State.
- Tracked approximately 41,000 academic and research media clips throughout the year in key print, digital and broadcast outlets, equating to over \$46 million in equivalent advertising value. These stories had a total combined reach of 40.4 billion readers and viewers globally. Among many excellent media placements, tracked 33 stories in the New York Times and 39 in the Washington Post.
- Managed and/or supported an average of two special events per week.
- Managed activities of Red & White Week, working closely with the Alumni Association and the colleges, to present a weeklong celebration that supports the Campaign.
- Wrote several successful proposals and worked with development officers to secure 8-figure support toward the overall Campaign goal and priorities. Total raised from these closed proposals was \$30.25 million.
- Wrote 40 original philanthropy features supporting campus wide fundraising goals; created eight other pieces of feature content including video-based stories, Campaign Cabinet Q&A series, landing pages, etc.; and provided Campaign-related communications and editing support to a range of campus partners.
- Curated and shared nearly 350 stories related to the campus-wide impact of private support through the weekly Philanthropy in the News (PIN) e-digest, Campaign Cabinet Updates and quarterly Campaign newsletter.

- Drafted, designed, produced and distributed the Chancellor’s Annual Report, now in its 11th year. The publication serves as a peer influencer piece and a multi-use handout.
- Continued to improve NC State’s peer influencer strategy, which included at least monthly targeted communications to higher education peers across the country, as well as targeted digital and print advertising in The Chronicle of Higher Education and Inside Higher Ed.
- Oversaw management of several crises and issues for the immediate and long-term benefit of NC State.
- Experienced an all-time high readership for the NC State Bulletin and secured a nearly 60 percent open rate. On average, more than 5,000 faculty and staff open the Bulletin each week.
- Generated more than 1.6 million visits to the NC State news site, a new record high and a nearly 20 percent increase over last year.
- Homepage garnered approximately 10 million visitors. NC State’s core site generated about 20 million total page views and continued experiencing big increases in traffic from social media.
- Grew total fan base across all four primary social media platforms (Facebook, LinkedIn, Twitter and Instagram) to 593,765 friends/fans, growing an average of 3,466 fans per month.
- Enterprise social media channels generated more than 115 million total impressions and over 1.5 million engagements, and 2.5 million video views with more than 3.5 million minutes watched.
- A Social Media Hub focus on philanthropy content resulted in more than 300 posts and tweets distributed across Facebook, Twitter, LinkedIn and Instagram, generating about 2 million impressions.
- Analyzed 238 daily gift reports to identify acknowledgment and communication opportunities for senior leadership; resulting in 930 Chancellor and Vice Chancellor acknowledgments.
- Completed 6 Impact Reports, completed nine photo/specialized books and five video cards, and sent 4,168 holiday and birthday greetings to donors.
- Throughout the year, USE welcomed approximately 9,000 guests to an NC State event (not counting Red and White Week). Guests ranged from the university’s biggest donors and prospects, to federal, state and local government officials, pipeline donors, faculty, staff, parents and friends.
- Ensured NC State’s most important donors and friends had positive, on-brand, and inspirational experiences that help the university achieve its strategic goals.

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