2019
University Advancement Strategic Plan:
Road Map to Constituent-Centered Culture and Organization
Introduction

NC State University is experiencing unprecedented momentum and success being driven, in part, by the visibility and impact of the Think and Do the Extraordinary Campaign. With more than two years remaining before its conclusion, the Wolfpack has blown past our Campaign goal of $1.6 billion. The Campaign’s record-breaking success can be attributed to a number of factors, including outstanding leadership across the university, tremendous progress in building a culture of philanthropy, and a large, passionate and generous alumni and friends constituent base.

The Campaign’s momentum is also a visible representation of how a strategic and effective advancement organization (including development, communications and alumni relations) can elevate NC State to new levels of success and deliver tremendous benefits to colleges, units, students, faculty, staff and citizens across the state. Even with these accomplishments, it is clear we’ve just begun to tap our potential, within University Advancement, and as a university.

Building on the Campaign’s momentum and Advancement’s impact, the timing is perfect to pivot and aggressively pursue a five-year road-mapping process that positions University Advancement to leapfrog to its vision of a mature constituent-centric culture and organization. Results from this process will include establishing a culture and organization that puts our constituents’ interests and passions first, regardless of their initial point of entry or affiliation within the university, providing measurable impacts including increased efficiency and effectiveness, a stronger university reputation, and ultimately more financial support for colleges and units across the institution.

University Advancement embarked on the road-mapping process in August 2018 by seeking for input from a variety of internal and external stakeholders, including Advancement staff, Chancellor’s Cabinet, academic deans, chief development officers, Board of Trustees Advancement Committee, Alumni Association Board, representatives of all foundations, and the Wolfpack Club Board. All of this feedback and input was then shared with a cross-campus steering committee comprising deans, faculty, trustees, administrators and Advancement staff. The steering committee has since provided valuable advice and guidance on the formation of the overarching vision and primary themes for the road map, which are:

I. Achieving Our Potential
II. The Think and Do Advantage
III. One Pack

Anticipated measurable outcomes from the road-mapping process will include, but will not be limited to, significant increases in annual fundraising totals; expansion of the engagement of alumni and friends; increased donor counts; a stronger national brand and reputation; enhanced third-party endorsements and rankings; stronger Advancement staff retention; and greatly improved return on investment, among many other metrics of success.
Constituent-Centered Culture and Organization

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Achieving Our Potential</th>
<th>The Think and Do Advantage</th>
<th>One Pack</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Purposeful Engagement</td>
<td>Reputation, Passion and Impact</td>
<td>Compelling Commitments</td>
</tr>
<tr>
<td>Strategic Investments</td>
<td>Human and Technology Resources</td>
<td>Brand Expansion/Amplification</td>
<td>Organizational Unification</td>
</tr>
<tr>
<td>Internal Processes</td>
<td>Leveraging Data Strategically</td>
<td>Digital-First Innovation</td>
<td>Outcome-Driven Accountability</td>
</tr>
<tr>
<td>Organizational Capacity</td>
<td>Optimized Talent Management</td>
<td>Pivotal Partnerships</td>
<td>Streamlined Business Practices</td>
</tr>
</tbody>
</table>

Advancement is dedicated to empowering NC State to achieve its extraordinary purpose.
Theme I: Achieving Our Potential

Achieving our potential as an advancement organization means fueling NC State to realize its unmatched potential. It begins and ends with the quality of personnel empowered to carry out our mission on behalf of this great university. This requires us to optimize talent management by creating consistent practices in the recruitment and retention of advancement professionals, including effective professional development, skills training, mentorship, career laddering, goal setting and accountability. We must become experts at strategically leveraging data to make decisions and accurately inform best-practice application of resources. We will need to invest in both human and technology resources, to include applying (and potentially reallocating) resources where opportunities are the greatest. This includes, for example, investment in a state-of-the-art advancement CRM solution to replace Advance. By getting the “right people in the right seats on the bus,” and leveraging technology and data, our stakeholders will experience purposeful engagement with NC State, leading to the optimization of the constituent-centric experience and enhanced impact on the university.
Theme II: The Think and Do Advantage

Based on numerous studies and measurements, NC State’s brand and its theme, “Think and Do,” have resonated exceptionally well within the broad range of our constituents since their launch. The brand continues to grow in audience awareness and acceptance as differentiating NC State from its competition and has served as a force multiplier as the primary, unifying identity for the entire university. To take full advantage of all that Think and Do represents, we are well positioned to leverage pivotal partnerships with key internal university stakeholders (Chancellor’s Cabinet, deans, department heads, faculty and staff, etc.) and important external leaders in corporations, foundations and government, as well as media and key influencers, among many others. By utilizing digital-first innovation, we can transition our partners to a more effective and user-friendly digital interaction with Advancement and the university. While our brand awareness in the region and around North Carolina has increased significantly, a meaningful investment in brand expansion/amplification is necessitated to ensure NC State’s excellence is well known and the university is highly respected across the nation and around the world, especially in key national markets. This will result in enhanced reputation, passion and impact within and among our varied constituencies, leading to outcomes such as improved rankings, more student applications and better-qualified students, recruitment and retention of top faculty, increased interest from partners and enhanced fundraising.

Theme III: One Pack

Perhaps the most important, and potentially the most complex, theme within the road map is transitioning NC State Advancement to a “one university” model and approach. This starts with having streamlined business practices focused on creating consistency around goal setting, events management, media relations, marketing, fundraising capacity, foundation board management, financial reporting and donor stewardship, as well as other core functions. Addressing these and other related issues will create clearer outcome-driven accountability, resulting in opportunities such as incentive-based compensation and other rewards and recognition. Our ability to effectively achieve this will require a comprehensive reorganization of Advancement across the university, with an emphasis on aligning resources for maximum ROI for the university, its colleges and its units. This will affect reporting lines and performance evaluations, and it will reinforce collaboration and commitment to a constituent-centric culture. With these elements in place, NC State will be well positioned to offer our stakeholders enhanced opportunities for compelling investments of their time, talent and treasure for the benefit of the university, wherever their passions may reside, to enable NC State to achieve its aggressive strategic goals.

Conclusion

With an overarching vision of establishing a constituent-centered culture and organization, this strategic plan is designed to provide University Advancement with an opportunity to leapfrog to become an innovative, best-in-class program, strategically positioned to empower NC State to achieve its extraordinary potential.
Road Map Launch and Implementation

In 2019, the University Advancement leadership team launched the implementation of the strategic plan in conjunction with university leadership and key stakeholders. The team identified the top 10 projects staffed by innovation workgroups. Each innovation workgroup is led by a Project Sponsor and Team Leader to expand the reach of and participation in the strategic plan.

A. Project Sponsors

Project Sponsors are members of the University Advancement leadership team who provide project vision, direction, resources and/or scope adjustments to successfully complete the project.

B. Team Leaders

A Team Leader has been selected for each project by the Project Sponsor. The Team Leader is responsible for project implementation, including identifying deliverables, and provides direction and guidance, defines and adjust schedules, sets priorities and standards, and monitors project progress to ensure objectives are fulfilled. The Team Leader works closely with the Project Sponsor and informs the Leadership Team about the status of the project.

C. Innovation Workgroups

Led by a Team Leader, these innovation workgroups, encompassing a diverse range of University Advancement and other representatives, are charged with brainstorming ideas to recommend a work plan that ensures goals and timelines for project deliverables are met by recognizing opportunities, recommending resources, prioritizing tasks and identifying obstacles/challenges as needed. Sponsors and Team Leaders identify up to six to eight key individuals for each team.
Top 10 Road Map Projects (2019-20)

• **Alumni Engagement Definition and Measurement/Scoring Model**  
  **Project Sponsor:** Benny Suggs  
  **Team Leader:** Minnie Bridgers  
  We will take a strategic approach to measure engagement to better understand what matters to NC State’s constituents. The scoring model should allow NC State to align programs and determine what activities to offer, leading to more engagement. We will use the primary categories determined by the Council for Advancement and Support of Education to measure engagement: volunteer, experiential, philanthropic and communication.

• **Comprehensive Modernization of Annual Giving**  
  **Project Sponsor:** Adam Compton  
  **Team Leader:** Latasia Priest  
  We will create a constituent-centered center for NC State Annual Giving with the primary objective being centralized messaging and strategies focusing on data-centered solicitations that communicate a personalized, highly curated message. Through this model Annual Giving will bring the university’s message in all areas of the program by investing in content strategists, data strategists, partnership with EAB Leadership Annual Giving contract and a journey platform.

• **CRM Transition Evaluation and Action Plan Outline**  
  **Project Sponsor:** Kushal Dasgupta  
  **Team Leader:** Kathy Kennel  
  Development and alumni relations technology for external communications, campaign support and personalized engagement are rapidly changing and reflect a constituent preference for online and social experiences. Over the years, as lower-cost tools became available, NC State has acquired add-on or ancillary systems based on specialized needs and is using software, tools and solutions that incorporate advancement data. The current infrastructure supports delivery of giving, biographic and prospect management information encompassing 600,000 entity records, 2 million gift transactions and 200-plus users. The system of record for NC State advancement data is Ellucian Advance. Advance was licensed and extensively customized for NC State 20-plus years ago. While Advance was once the top choice for integrated advancement system support in complex higher education institutions, new solutions are available that incorporate better user interfaces, mobile support and improved handling of engagement and prospect data. This combination of growing internal needs and an expanding marketplace creates a need for a workgroup to elicit inputs and identify a path forward for next-generation CRM technology for Advancement. The goals of the workgroup would be to propose an implementation plan to deliver an agile and innovative experience to the entire university community, and to connect and secure disparate sources of constituent information.
Prospect Pipeline Strategy, Transparency and Accountability

Project Sponsor: Jim Broschart
Team Leader: Peyton Stokley

To maximize the effectiveness of our major gift program we will create a culture of pipeline awareness and personal accountability at all levels: front-line fundraisers, chief development officers, deans and leaders. We will maximize the number of prospective donors in our pipeline through disciplined documentation and best-practice LAG and major gifts efforts, and we will create tracking, reporting and communication practices to ensure transparency and broad-based buy-in. We will forecast on a routine basis using consistent methods and share the information widely. We will collaboratively develop, document, communicate and execute strategy for our most important prospects and work to do the same for all major gift prospects. We will evaluate our individual, unit and collective success based on a communicated set of metrics.

Full-Service Recruitment

Project Sponsor: Reid Ricciardi
Team Leader: Griffin Lamb

Talent Management at NC State is focused beyond “getting the right people with the right skills in the right roles.” By leveraging the collaborative culture and trust-based relationships that have been established over the past several years, we will build a proactive and responsive Talent Management Office that can serve the recruitment, onboarding, professional development, training and career planning needs of the University Advancement community. Our goals include developing best practices, efficient protocols and holistic strategies related to these core processes and implementing them with employee-centric, manager-centric and organization-centric approaches. Retention of high-performing employees, average time to hire and engagement related to professional development and training will be key measurements driving our work and service.

Brand Management Strategy

Project Sponsor: Brad Bohlander
Team Leader: Chris Boyer

NC State is widely recognized as a leading national research university with a brand that conveys action, impact and excellence. NC State’s brand is a strategic asset that has significant tangible value for the university community and for external entities seeking to partner with the university. NC State has a tremendous opportunity to elevate brand awareness and affinity, facilitate investment from businesses, enhance its partnerships and improve its revenue generation by establishing the Office of Strategic Brand Management. This office, reporting to NC State’s chief communications and marketing officer (who has responsibility to manage the university’s brand) and supported by the larger UComm team, will consist of several currently dispersed and overlapping responsibilities, including: university brand management and protection; management of logos, trademarks and licensing; and managing commercial university sponsorships with outside business partners.
NC State’s brand momentum and impact are just beginning to take hold. At this unique point in time, launching the Office of Strategic Brand Management empowers NC State to capitalize on its strong and rising brand awareness to help the university accomplish its goals and achieve its potential.

**Digital Engagement Strategy Plan**

**Project Sponsor: Brad Bohlander**  
**Team Leader: Scott Thompson**

As a forward-thinking, modern University Advancement team, we will use advanced digital technologies to improve performance by effectively targeting, engaging and moving constituents to desired outcomes (awareness, action, etc.). We will ensure systems (technologies, staff and operations) have the capabilities and expertise to capture, measure and share data across the institution and most effectively use data to make decisions.

As a first step, implementing a marketing automation solution will empower NC State Advancement offices, including University Communications and Marketing, Annual Giving and the Alumni Association, with the ability to be better coordinated and much more constituent-focused. This digital solution provides enhanced constituent personalization and individual engagement, and it allows communications professionals the opportunity to more quickly create and tailor content that can be delivered (and tracked) across many different channels on virtually any device. This digital technology incorporates artificial intelligence and allows communicators to create personalized constituent journeys. The tool also provides built-in analytics that allow users to learn how different content and actions work best with specific constituents.

Part of this implementation will be investing in staff with the expertise to best manage this technology.

**Deans Task Force and Comprehensive Advancement Model**

**Project Sponsor: Brian Sischo**  
**Team Leader: Kushal Dasgupta**

Launch a Deans Task Force to represent all deans, which will work closely with the University Advancement leadership team to help advise on the implementation of Advancement’s five-year road map (strategic plan). The Deans Task Force will meet regularly, with the goal of beginning to implement the Advancement strategic plan within the fall 2019 semester. The Deans Task Force will also provide regular updates at upcoming Deans Council meetings in order to ensure fully transparent lines of communication.
Best Practices for Affiliated Foundations

Project Sponsor: Derek Bryan
Team Leader: Jeff Baynham

The establishment of a constituent-centered culture and organization requires that our constituents be able to conduct “business” easily with the university through its many units, divisions and affiliated entities/foundations. The consideration of the needs of our constituents in the development of a consistent set of operating procedures will enable the effective delivery of our message to those we engage through NC State’s many entry points. The constituent-centered best practices that we develop while complying with applicable university policies and state or federal regulations will be key in helping NC State reach its lofty University Advancement goals.

University Events Center of Excellence

Project Sponsor: Brad Bohlander
Team Leader: Ellen Klingler

As outlined in “Pathways to the Future,” NC State’s strategic plan, “achieving excellence requires constant attention, self-assessment, inclusion, and the courage to change and adapt.” To address University Advancement’s critical role in elevating brand awareness, increasing engagement, and strengthening pride in place among our constituents, we recognize the need for a center of excellence for university special events, hospitality and protocol that provides both strategic and practical event management services to campus partners. The center of excellence for university special events would provide appropriate oversight and management to ensure consistent branding, messaging, reporting, strategy and impact. At the core of the center would be extensive knowledge, experience and resources related to best practices and production to ensure a standardization of hospitality, engagement and pride in place. This full-service office would execute a comprehensive events strategy and logistics plan to ensure that all live communications are meaningful and impactful, that these experiences advance brand and campaign goals, and that our most important guests have appropriate and memorable experiences.