



University Advancement Annual Summary of Accomplishments

Fiscal Year 2019-20

Stepping Up to Deliver Extraordinary Impacts in a Time of Need

Fiscal year 2019-20 brought unprecedented challenges as NC State responded to the global COVID-19 pandemic. Throughout this time of rapid change, widespread anxiety and unparalleled need, University Advancement rallied to provide extraordinary support to the NC State community in a variety of innovative, impactful and lasting ways.

Although the year started as planned, the way it ended was certainly not what anyone expected, or even fathomed. However, true to our university's strong tradition, we *don't ever give up*. Empowered by our *Think and Do* spirit, University Advancement adapted, adjusted and delivered. In a time of great need, Advancement accomplished more to protect, promote and advance NC State University than ever in our proud history.

Throughout the year, before and since the COVID-19 outbreak, University Advancement consistently drove exceptional momentum and tremendous outcomes for NC State through the combined work of our teams in Development, Advancement Services, Communications and Marketing, and Alumni Relations. During the 2019-20 fiscal year, the University Advancement division worked collaboratively across our departments and across campus to impactfully serve our community, continually drive NC State's upward trajectory, and achieve unparalleled accomplishments that enable NC State to achieve its strategic goals.

A handful of examples of accomplishments follow.

Record-Breaking Year in Fundraising

In the midst of a global pandemic, transitioning to remote work and focusing on providing support to those who need it most in this challenging time, University Advancement never took its foot off the gas – in fact, our team worked harder, smarter and more tirelessly than ever. University Advancement effectively engaged and truly inspired NC State's friends and donors to make a difference in the life of this great university.

As a result, ***NC State experienced the best fundraising year in the university's history***, raising more than \$235 million during the academic year. This strong effort helped push NC State past its initial Think and Do the Extraordinary Campaign goal more than two years ahead of schedule.

Additional Development details are highlighted in the sections below, but a few direct outcomes of the year include:

- 101 new scholarships and fellowships established to support students in FY 2019-20. This brings the total to 779 new scholarships and fellowships throughout the Campaign, helping thousands of students succeed at NC State.
- Nine new distinguished professorships. Of the 241 endowed faculty positions at NC State, 95 have been created during the Campaign.
- A new record number of faculty and staff donors showing support to their university.
- In total, NC State has enjoyed the support of more than 93,000 Campaign donors.

The record fundraising is a very visible example of the many broad impacts University Advancement made to elevate and improve NC State last year.

Strategic Plan Roadmap – Top 10

Building on the success of the Think and Do the Extraordinary Campaign, University Advancement launched its Five-Year Strategic Plan Roadmap in 2018. The Roadmap is a strategic plan and process that is empowering Advancement to elevate NC State to unsurpassed levels of impact and success, and deliver tremendous benefits to colleges, units, students, faculty, staff and citizens across North Carolina.

Over the last fiscal year, Advancement put tremendous focus toward the first 10 Roadmap Projects. These critical projects were undertaken by more than 80 University Advancement and college/unit workgroup members whose impressive efforts advanced the strategic plan and achieved several key goals.

In spite of the pandemic and transition to remote work, due to the hard work and dedication of workgroup members, several of the 10 projects had successfully concluded or been operationalized. The other longer-term projects continue their important work or transitioned to an updated project. Each project elevated NC State to new levels of success and delivered tremendous benefits to all the colleges and units. Highlights follow.

- *The Deans Workgroup*: This leadership group serves as a critical advisory team regarding the implementation of organizational measures to empower University Advancement to elevate NC State, its colleges and units. This leadership team also serves as a primary means of keeping colleges informed and engaged as we advance the Roadmap. This group took the critical step of developing a cost-sharing structure in which to expand the fundraising capacity of colleges where additional potential exists.
 - The group continues its important work and is fine-tuning how the colleges and Advancement work together in achieving the Roadmap.
- *University Special Events Center of Excellence*: The collaborative work of this group focused on creating a center for university special events, hospitality and protocol that provides strategic and practical event management services to campus partners. This full-service office will execute a comprehensive events strategy and logistics plan to ensure all live communications experiences are meaningful and impactful, and advance brand and Campaign goals.
 - This project continues. As the next step, a consultant has been selected to conduct a comprehensive assessment and evaluation of special events processes, staffing and practices university-wide.
- *Best Practices for Affiliated Foundations*: This team worked to develop a consistent set of operating procedures that will enable the effective management and delivery of the university's message to members of NC State's affiliated entities and foundations. The constituent-centered best practices that are being developed will be key in helping NC State reach its Advancement goals.
 - This project continues and is in the final stages of developing a set of university-wide best practices, standards and resources for volunteer board management.
- *Prospect Strategy, Transparency and Accountability*: This team focused on creating a culture of pipeline awareness and personal accountability at all levels. The group developed performance standards for frontline fundraisers to be applied university-wide in support of goal-setting and performance management. The group also consulted in university-wide gift officer portfolio resizing and in reviewing the results of the first year of Active Management Protocol, a set of time-based criteria aimed at moving more fundraising prospects through the development cultivation cycle.
 - This important project was completed in FY 2019-20.
- *Full-Service Recruitment*: This team is dedicated to building 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. This proactive workgroup implemented an

Advancement-wide survey to establish needs and perceptions around the talent recruiting process and created recruiting process documentation. The group was also instrumental in compressing search timeframes.

- The goals of this project were completed in FY 2019-20.
- *Comprehensive Modernization of Annual Giving:* This team committed to creating a Constituent-Centered Center for NC State Annual Giving. The primary goal was ensuring centralized strategies focusing on data-centered solicitations that communicate personalized, highly-curated messages. This team engaged in benchmarking to identify best practices in annual giving programs and delivered a set of recommendations about reporting and dashboards, as well as a strategy on crowdfunding. The group also recommended a comprehensive organizational model.
 - The goals of this project were completed in FY 2019-20.
- *CRM Transition, Evaluation and Workplan:* This project focused on modernizing development and alumni relations technology for external communications, campaign support and personalized engagement, responding to a constituent preference for online and social experiences. Specifically, the team worked to identify a path forward for next-generation CRM technology for Advancement. This group created a visual Advancement Technology ecosystem map demonstrating the complexity, number of, and inter-dependency of our information systems and tools. The workgroup also recommended a Technology Advisory Group and related governance process.
 - This complex, long-term project is continuing into the new fiscal year.
- *Alumni Engagement Definition and Measurement:* This workgroup initiated establishing a strategic approach to define and measure engagement to better understand what matters to and influences NC State's constituents. An effective scoring model will allow NC State to align programs, determine what activities to offer and ultimately lead to more engagement. This group selected and implemented an alumni engagement scoring platform. The team collected historical engagement data to feed the system and decision-making going forward.
 - The goals of this project were completed in FY 2019-20.
- *Digital Engagement Strategy Plan:* This forward-thinking team sought to examine and evaluate advanced digital technologies to improve performance by effectively targeting, engaging and moving key constituents to desired outcomes, as well as capturing, measuring and sharing data across the institution for effective decision making. As a first step, the workgroup examined complex marketing automation software, which would allow Advancement units centrally and across campus to be better coordinated, data-driven and much more constituent- focused. The team initially analyzed two industry-leading products, and has since been evaluating several others. The chosen software will represent a significant expense and involve a multi-year implementation strategy, but will provide a big step forward in NC State constituent communications.
 - This complex, long-term project continues in the new fiscal year and has been combined with a new project.
- *Strategic Brand Management:* This team worked to elevate NC State's brand awareness and affinity, facilitate investment from businesses, enhance its partnerships, and improve its revenue-generation by establishing the Office of Strategic Brand Management. The team worked collaboratively among group members and with campus constituents. The new office is established and operational, and includes university brand management and protection; management of logos, trademarks and licensing; and managing commercial university sponsorships with outside business partners.

- This project's goals were achieved in FY 2019-20.

Taking Care of the Pack (Student Emergency Fund)

The Student Emergency Fund was established to help ensure that NC State students have access to the support and resources needed to successfully recover from unexpected financial crises and remain on track academically.

As the impact of COVID-19 pandemic and resulting changes in campus operations, many NC State students — especially those who are already under resourced, are from or who were studying in heavily impacted areas, or whose situations changed dramatically — were left facing new and often overwhelming challenges. Many lost jobs. Some needed emergency housing or travel funds. Some needed help with medical bills. Others lacked the resources to participate in online instruction.

University Advancement stepped up in this time of need. Through the combined efforts of all our Advancement units – which included social media pushes, videos, alumni engagement, many direct donor asks, a new web presence and more – the Wolfpack raised more than \$1 million for the Student Emergency Fund before the end of April. That total has grown to more than \$1.25 million and has helped hundreds of NC State students stay in school and stay on track academically in the face of unexpected financial emergencies.

Leading the Pack

Under the strong leadership of the Vice Chancellor for University Advancement, the UA division facilitates communication, internally and externally, to enhance the brand and reputation of NC State; provides meaningful programs and service to alumni and friends; builds and sustains a strong volunteer leadership network; raises money from private sources; and manages an effective alumni and development database and gift systems. In addition to the overall leadership, management and coordination of the division, following are a few highlights of the past year for the office of the Vice Chancellor for University Advancement.

- Restructured the Vice Chancellor's office to further refine and develop the Principal Gifts Program, which led to the hire of an Assistant Vice Chancellor, a part-time Principal Gifts Project Coordinator as well as an Executive Assistant to the Vice Chancellor.
- The Vice Chancellor participated in a total of 56 donor visits; 44 of those were joint visits with the Chancellor, Dean's, AVC for Principal Gifts and Chief Developments Officers.
- Completed a mid-campaign feasibility study with approximately 50 of NC State's top donor/prospect households to determine the confidence in leadership, organization, and ability to achieve \$2 billion. Confidence from this group was very high and the information gathered from the study was instrumental in guiding donor strategies and developing plans for the final two years of the Campaign.
- Developed several 2-3 hour listen-and-learn programs with each University Advancement unit to meet the staff, hear about their individual team projects and successes, and participate in Q&As. In a time of remote work, these unit visits provided more face-to-interaction with team members, many that the VC office doesn't interact with on a regular basis due to office locations around campus and time constraints.
- Launched the public rollout of the Women in Philanthropy initiative by announcing the formal name, leadership council, mission and vision. *Wolfpack Women In Philanthropy* is a women-led council with a vision to inspire and engage women to transform the culture of philanthropy at NC State through influential leadership and impactful giving.
- Expanded the principal gifts program by adding key leadership and support staff, building on partnerships across campus with a specific focus with college Deans and developing strategic principal gift donor best practices.

- Completed an in-depth workplan for Development and Alumni Engagement Reactivation as a result of COVID-19 and its impacts to campus. The plan provides guidance to all University Advancement employees as we experience challenges and hurdles with working remotely, cancellation of events including sports, continued need for fundraising. The plan provides ongoing direction for transition into the academic year.

University Development

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 this mission in even bigger and bolder ways.

In spite of the global pandemic, and with team members working and collaborating remotely, Advancement's focused development efforts, working alongside partners from across the division and the university, drove a record-breaking fundraising year for NC State. A few highlights follow.

- Raised \$235,282,019, the best fundraising year in NC State's history, and 7.5% above our impressive three-year average.
- The highest fundraising totals in our university's history have been achieved the past four fiscal years, and fiscal year 2019-20 marked our fourth consecutive \$200 million-plus year at NC State.
- Celebrated exceeding our Campaign goal more than two years early on Red and White Night with a Campaign total of \$1,617,927,266.
- University Development also achieved a number of additional Campaign milestones ahead of schedule, including:
 - \$1.7 billion by the originally scheduled date of Day of Giving.
 - \$1.75 billion by the end of the fiscal year.
- Achieved consensus around and rolled out gift officer performance standards as a means of aligning fundraising expectations across campus. The standards were important in ensuring a disciplined and uniform goal-setting process across colleges and units, as well as in developing partnerships with the colleges related to cost-sharing.
- Seven of 10 colleges, and 11 of 15 colleges or units tracking Campaign goals, reached their goal by the end of FY 19-20, 18 months before the scheduled end of the Think and Do the Extraordinary Campaign.
- University Development saw a marked increase in gift officer activity and donor contact during a challenging external environment.
 - FY20 visits versus FY19: increase of 10%.
 - FY20 qualifications versus FY19: increase of 76%.
 - FY20 asks versus FY19: increase of 36.
 - FY20 qualifications into portfolio as a major gift prospect versus FY19: increase of 330.
- Planned gift commitments to NC State increased from \$53.7 million in FY19-20 to \$ 78.6million in FY20-21, a 46% increase.

Principal Gifts

FY 2019-20 brought a new focus and power to NC State's successful principal gift efforts with the creation of the Assistant Vice Chancellor for Principal Gifts role. With this emphasis, in partnership with campus leadership and

colleagues across campus, this program is leading NC State toward achieving its ultimate principal gift potential. A few highlights from the office's first year follow.

- Secured seven gifts of \$5 million or more, totaling \$78 million.
- Achieved the highest annual number of principal gifts closed in the Campaign period, and the second highest total dollar amount raised.
- In response to COVID-19, managed 10 zoom calls to provide campus updates from the Chancellor to principal gifts donors, prospects and other key constituents. Calls averaged 130 attendees.
- Facilitated 23 joint donor meetings with the Chancellor, Vice Chancellor and other fundraising partners.
- Identified the university's priority principal gifts prospects.
- Created a Donor Strategy Review Process for campus collaboration.
- Developed a variety of materials to improve the principal gifts process, including pre-meeting agendas, a donor strategy and engagement plan, and research profiles.
- Launched a collaborative principal gifts review process with internal and external constituents.
- Developed a tracking platform for coordination of donor's and the Vice Chancellor's next steps.
- Created the PGP Donor Profile Survey.
- Created 16 full-strategy/donor engagement plans to coordinate and lead activity among development colleagues toward our donors' ultimate principal gifts to NC State.
- Partnered with Prospected Development to create a new principal gift research report and updated 47 PGP profiles.
- Launched an internal Principal Gifts Steering Committee.
- Created a system for monitoring gifts of \$5M and above.

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. Following are a few highlights from Advancement's Office of Talent Management for the last year.

- Led and completed 20 searches for Central Major Gifts, University Development, Annual Giving, College of Design, College of Engineering, Poole College of Management, CHASS, DASA, Alumni Association, University Advancement Leadership, and University Communications.
- Half of all searches were completed in under 90 days; the majority of searches included Talent Management sourced candidates (four were hired in FY20).
- Successfully coordinated completion of Plus Delta Cohorts #4 & #5 (29 participants); CCL cohort #2 (8 participants); and coordinated a new all-inclusive Academic Impressions membership.

- Partnered with Advancement Services to implement Training and Professional Development weekly emails and utilize the Advance portal to share additional resources for all staff in the division.
- Completed recruitment survey and audit in conjunction with the Roadmap Workgroup, and achieved a 49% response rate. Findings led to implementation of improvements to core search processes helping to increase responsiveness and overall efficiency.
- Facilitated a PCOM MBA Core Competency project. Findings will inform professional development and performance management in the years ahead.
- Completed site visits to Duke and Rutgers. These meetings resulted in affirming best practices, building on thought leadership and paving the way for overall improvement of Talent Management operations.
- Established the New Hire Lunch events as part of the onboarding process for all new UA employees. Each lunch was hosted by the Vice Chancellor who led open conversations with attendees. Feedback was extremely positive.
- Extended NC State's visibility among peers and potential candidates locally and regionally (evidenced in part by Advancement Careers website analytics).
- Actively participated in the CASE District Conference (36 NC State staff attendees), and the CASE Strategic Talent Management conference.

Advancement Services

A best-in-class Advancement Services operation is critical for the success of the overall University Advancement operation. Advancement Services continues to play a critical role providing the tools and resources for success in Advancement as the team consistently strives to find ways to be more efficient in its processes and more impactful in the data and work products provided. A few highlights of the key strategic initiatives completed in FY 2019-20 follow.

- Developed digital dashboards and reports for Campaign forecasting and pipeline projections, which has driven greater accuracy in proposal data and forecasting.
- Completed the data mart project, creating efficiency in requests.
- Launched modernized solicitation controls (opt-ins/outs).
- Completed a successful Portfolio Scrub, reduced more than 1,000 assignments and set metrics for portfolio sizes by stage. This provided for enhanced portfolio accountability.
- Launched the new Development Officer Rating score.
- Completed an Employment Append, with 35,000 updates.
- Produced e-receipts for all online giving gifts.
- Provided enhanced Digital Endowment Reports, with 75% of more than 3200 reports delivered digitally.
- Implemented DocuSign for gift agreements, namings, commitment forms, planned giving SOIs, and securities gifts.

- Create an SOP for Complex Assets and Creation of Gift Acceptance Committee.
- Improved the process and reduced errors for the Digital Gift Transmittal Form.
- Developed the Naming Opportunities Toolkit.
- Developed standardized approved Gift Agreement language.
- Implemented system automations to support AMP timeboxing.
- Incorporated Textiles Foundation data into central operations.
- Automated gift and data processing for DoG - won a District III award for the effort.
- Launched AOPs monthly onboarding training.

Alumni Relations and the Alumni Association

The Alumni Relations team serves the more than 250,000 living NC State alumni who live in North Carolina, across the country and around the world. These alumni are the foundation of the university's support and critical to the success of NC State's Campaign. The Alumni Association empowers alumni to stay effectively engaged with the university, feel a sense of pride in their degree and experience, and advance the university in ways large and small - whether it's giving back financially, volunteering, or just helping spread the word about NC State. Following are some Alumni Association highlights from the last year.

- Continued to create one-of-a-kind experiences for alumni. The Alumni Association events team enhanced the Homecoming game experience by creating a Tailgate Tour, giving out "Howl Back" flags and making personal connections with more than 600 members and friends.
 - Also moved the popular Legacy Luncheon event indoors to Reynolds Coliseum, increasing attendance and the overall experience for this important group of new students and their alumni families.
- Effectively engaged members of the Pack early, growing membership in the Student Alumni Association by 10 percent and maintaining its status as the largest student organization on campus.
 - During the pandemic, pivoted to provide a virtual "Welcome to the PACK" experience for incoming students, and turned the usual in-person giveaway of "PACKing for NC State" signs into a membership campaign.
- Career services offerings provided value and relevance for members, which became even more important given the economic fallout from the pandemic.
 - Provided virtual events, including a series just for young professionals, that reached over 2,000 viewers.
 - More than 1,900 members elected to take advantage of the benefits and resources offered.
- As part of the University Advancement Roadmap, the Association helped create an alumni engagement definition and scoring model using categories determined by CASE (volunteer, experiential, philanthropic and communication). Set to launch in July, this model will help the university align programs and events to maximize engagement.
- The Caldwell Fellows program provided extraordinary experiences for students.

- The Caldwell Fellows exceeded its Campaign goal by \$1.2 million, and strong funding allowed for an additional two spots for new Fellows in the spring selection, for a total of 28 in the Class of 2023.
- Increased the annual per Fellow award from \$7K to \$8K.
- Added a new assistant director to the staff to provide the best possible experience for students.
- Delivered segmented, branded marketing strategies to support membership and engagement.
- When the pandemic hit, created an Alumni Association Resource page to highlight alumni-owned businesses and curated social media content to keep alumni informed and engaged.
- NC State magazine won a number of awards in the CASE District III competition, and for the first time, earned a platinum award in the national contest for the Best Article of the Year.
- Engaged alumni in Raleigh and around the country.
 - With the help of a new position focused on regional engagement, were able to better address the needs of some of our largest alumni networks in places like Charlotte and Washington, D.C.
 - In the eight months of the year before the pandemic hit, saw an 11 percent increase in the number of regional engagement events over the previous year.
 - Closer to home, successfully transitioned the Wake County Alumni Network into a new, larger Triangle Alumni Network with a wider reach of volunteers and programming.
- Earned a CASE District III Gold Award for the Black Alumni Society's BASFest.
- Efforts to bring in revenue from memberships, sponsorships, magazine advertising and other partnerships combined with a constant focus on the bottom line by all department heads resulted in a budget carryover of \$180,000. Although the pandemic hurt operations, the team was able to close out the fiscal year in great shape.

University Communications and Marketing

Strategic and impactful brand strategy, marketing, communications and events are critical in achieving Advancement and university strategic goals. With the pandemic, the year didn't go as planned. But, it was still a strong and impactful year for UComm across its areas of Marketing Communications, University Relations, University Special Events, Development Communications and Stewardship, and Strategic Brand Management.

In both proactive and responsive efforts - some very visible and many behind the scenes – UComm accomplished more to protect and promote the NC State brand and reputation than ever before. A few highlights follow.

- Launched the Office of Strategic Brand Management, including incorporating Trademark Licensing operations into UComm, and starting the University Sponsorship Program.
 - Worked with Wolfpack Outfitters to produce officially-licensed NC State face masks to advance the NC State brand in this unprecedented time. \$5 from all orders going to the Student Emergency Fund. Approximately 10,000 masks were ordered equating to a \$50,000 contribution.
- Advanced local, regional, national and worldwide brand awareness and reputation by placing 41,059 media clips in top regional, national and worldwide media outlets resulting from a targeted strategy focused on NC State research, academic success, and the university's brand drivers.
 - Total reach of more than 174 million readers/viewers and a total publicity value of \$40.9 million.

- Established a new In-House Advertising Service to support and advance marketing efforts and impact across the university. The unit supports both central efforts as well as campaigns for the colleges and units.
- University Special Events engaged with nearly 13,000 households and welcomed nearly 7,000 guests to on-campus events before stay-at-home orders were enacted.
 - Thirteen confirmed events were cancelled due to the Pandemic; however, Special Events engaged several thousand guests remotely through a series of outreach opportunities with the Chancellor.
 - Since the pandemic, USE continued their important work for all virtual events - and created toolkits and guidelines for branded virtual events to share with all campus event planners.
- Continued to lead efforts promoting the Extraordinary Opportunity Scholarship Initiative, including building out the Promise of Access and Meeting our Students' Needs webpages with several stories, video, Q&As, and calls to action.
- Launched a new University Calendar to improve the way NC State communicates events and calendar opportunities.
- Beginning in February, team members served on the initial Coronavirus Response Group, and the team has continued to serve on a variety of leadership and operational teams throughout the pandemic, in addition to leading communications teams and related efforts across campus.
- Worked to quickly launch and continually update the university's COVID-19 Response website as the university's primary information source for all things related to the coronavirus and its impacts to campus.
- Working in concert with New Student Programs, DASA, OIT, EMAS, Campus Enterprises, all colleges and several other partners, was able to migrate and adapt 2020 Commencement, New Student and Family Orientation and Summer Start programs to the virtual space.
- At an unprecedented time when the university could not hold commencement ceremonies, UComm ensured the university's newest alumni were celebrated, respected and honored.
 - The team worked to turn the homepage, Bulletin, enterprise social media channels and partner college web sites into a celebration of graduates.
 - The Social Media Hub alone drove 3,890,757 impressions and 129,135 engagements through the Virtual Graduation Celebration efforts.
- Bulletin readership spiked in March 2020, with an average open rate of 75% for the month, and sustained increased readership since then with a current average open rate of 68% compared to 55% in FY 2019.
- Traffic on the news site exceeded 1.3 million page views for the fifth year in a row.
- Grew total fan base across all four primary social media platforms (Facebook, LinkedIn, Twitter and Instagram) to approximately 600,00 friends/fans.
 - Throughout the year, the Social Media Hub generated approximately 100 million total impressions, and an impressive 2.4 million engagements (up from 1.5 million engagements last year).
- Led and supported the highly successful Pack Appreciation Day through content strategy, writing, editing, web support, marketing promotion and stewardship.

- Before and throughout the pandemic, University Special Events expanded campus-wide partnerships, focused on elevating the brand of the university and the Campaign, and expanded awareness of how purpose-driven experiences impact pride in place among constituents.

-end-