



University Advancement Annual Summary of Accomplishments

Fiscal Year 2023

An Extraordinary Past Points Toward a Bright Future

For University Advancement, fiscal year 2022-23 was all about building on the success of the Think and Do the Extraordinary Campaign to help move NC State forward. The campaign's achievements in fundraising, stakeholder engagement and building a culture of philanthropy have made it possible for the university's faculty, staff, students, alumni and friends to pursue our mission of teaching, research and outreach at a higher level of excellence than ever before.

In a post-pandemic year when NC State returned to full in-person instruction and many staffers entered a hybrid work environment, University Advancement adjusted to the new normal and ensured maximum flexibility, nimbleness and responsiveness from all our units as we continued working diligently toward our strategic goals.

Among University Advancement's top-level achievements:

- Finished FY23 with total gifts and commitments of \$236 million, the second-highest annual fundraising total in the history of NC State.
- Launched the newly integrated Alumni Engagement and Annual Giving unit, and transitioned the Alumni Association out of a paid membership dues model.
- Selected and initiated the transition to a next-generation CRM to replace Advance.
- Expanded UA's cost-sharing partnership program to include all 10 colleges, including new partnerships in special events and stewardship.
- Launched the newly integrated Office of Finance, Administration and Talent Management, which provides essential services to colleagues across University Advancement, highlighted by a new and innovative "career pathways" approach to staff retention and career growth.
- Completed our fifth annual Day of Giving with a new record for the number of gifts received, at nearly 17,000, with total gifts and commitments of over \$34 million.
- Launched four new projects in the final year of UA's Strategic Plan Road Map.
- Launched a monthly newsletter from the UA Taskforce for Inclusion, Diversity and Equity, highlighting opportunities for active involvement and engagement in making University Advancement more diverse and inclusive.
- Earned approximately 40,000 media mentions throughout the year in many of the nation's top media outlets, with a total reach of nearly 8 billion

readers/viewers and a total publicity value of \$69.7 million.

Strategic Plan Road Map

University Advancement launched a five-year Strategic Plan Road Map in 2018, creating a formal process for strengthening the organization as it works to elevate NC State to new levels of impact and success. Here are some highlights from the new strategic projects launched in the past year:

- **Signature Awards:** This workgroup engaged in a comprehensive review of universitywide and college-level awards in order to seek alignment, a clear hierarchy, optimized events and timing of awards, and streamlined selection, in order to create a better experience for our awardees and a more visible and impactful awards process.
- **Comprehensive Constituent Engagement Strategy:** This workgroup is developing a comprehensive two-tiered approach to universitywide volunteer engagement that will drive higher and deeper development-focused engagement as well as more broad-based engagement.
- **Collaborative Strategy for Parent Philanthropy:** This workgroup is developing a comprehensive strategy for parent philanthropy that includes engagement, annual giving, leadership annual giving, and major and principal giving.
- **Optimizing the Gift Agreement Process:** This workgroup initiated an assessment of the gift agreement process to identify improvements in areas such as workflow, role clarity and limitations based on endowment level in order to enhance the giving experience for donors, improve the effectiveness of staff, reduce complexities and ensure compliance.

University Development

With University Development's leadership, NC State saw sustained growth in the number of gifts proposed, the dollar value of gifts proposed and other key indicators. The unit experienced minimal turnover, and two assistant directors of philanthropy were hired.

Here are a few highlights of University Development's achievements this year:

- As of June 30, 2023, gifts and commitments to NC State totaled \$236 million, our second-highest annual fundraising total. University Development partnered or led on efforts totaling 40% of the university's total.
- The Office of Gift Planning led the way in growth for University Development, celebrating a gift from the Colliers (\$25 million) and the McCrary gift (\$10 million).

- Central Major Gifts partnered with gift officers across the university to raise \$11 million (setting aside the Collier gift).
- The number of prospects in gift officers' portfolios grew to 3,600, far exceeding the highest level in the campaign.

Principal Gifts Program

The Principal Gifts Program focused on increasing the number of proposals in the pipeline, optimizing donor interactions and building a culture of gifts totaling \$5 million or more. The number of proposals submitted remained fairly stable from last year, but the number of \$5M+/principal gift asks submitted and briefings to support those interactions greatly increased.

Some of the program's achievements from the past year include:

- The program secured \$51.7 million from four gifts of \$5 million or more.
- Of the top 20 cash gifts in FY23, PGP led or assisted with 13, which resulted in \$26.9 million raised.
- A gift commitment from the Williams family supported a new four-year pilot program for experiential learning opportunities for students with financial need.
- A gift commitment from the Doeren family funded One Pack Empowered, supporting neurodiverse students.
- A gift commitment from Mohammed Mansour provided international student support by meeting emergency needs and funding graduate fellowships.
- The chancellor, vice chancellor and assistant vice chancellor conducted a combined 144 donor meetings throughout the fiscal year.
- We created the first "Inside NC State" program during Red and White Week, which brought 39 of our best donors to campus for a hands-on experience with our incredible faculty and facilities.
- PGP completed 63 research requests that included 23 principal gift prospect research profiles accessible to the advancement community via Advance.

Alumni Engagement and Annual Giving

FY23 was the foundational year for this newly integrated team to begin the work of elevating engagement and giving that serves NC State. The AEAG team developed its Team Pillars, which guide how and why they accomplish their work. They also began utilizing new tools such as Smartsheet and Monday.com to help streamline work and increase communication and collaboration within the team. AEAG also supported the transition of the NC State Alumni Association membership model. Highlights include:

- Day of Giving was once again an outstanding success. In this effort, 11,694 donors gave 16,774 gifts — the most gifts NC State has received on a Day of

Giving –totaling \$34 million. This dollar total is second only to the 2021 total, which at the time set a national record for higher-education giving days.

- Established the UA Engagement Roundtable to provide a space for the colleges and units to share ideas, plans and collaborative strategies across UA.
- Hosted six alumni events featuring Chancellor Woodson (Richmond, VA; Norfolk, VA; Charlotte, NC; Triangle area, NC; Greensboro, NC; and Washington, DC), including collaboration with Central Major Gifts, the College of Design, the College of Engineering and the College of Humanities and Social Sciences.
- Annual Giving focused on executing an intentional second ask and recurring gift solicitation strategies, resulting in a 6% increase in the average gifts per year per donor. AG's direct mail strategy raised 10% more in dollars and garnered over 300 more donors.
- Leadership Giving continues to grow the midlevel giving program at NC State. Since the beginning of the fiscal year, the team has added eight new members. They formalized an onboarding process, and their Leadership Giving Academy has a goal of having team members be fully operational and prepared by their 60th day of work. This team secured over \$1.4 million in gift commitments and made approximately 19,500 contacts with current and potential donors.
- Grew the @NCStateAlumni social media presence to 100,063 fans/followers across Facebook, Twitter, Instagram and LinkedIn accounts.
- Created and launched eight original content videos to strengthen NC State's mission and unite alumni.
- Over 485 NC State alumni and friends explored the world through 76 domestic and international travel opportunities. Overall, WolfTreks increased revenue by \$25K to over \$150K.
- Partnered with the Wolfpack Club to combine our Welcome to the Pack with their Coaches Caravan. This allowed AEAG to visit seven cities (an increase over the four cities hosted in fiscal year 2022).
- Experienced an increase of 6.4% in the number of class rings sold.
- Engaged approximately 38.9% of Student Alumni Association members through programming efforts. Engaged over 200 young alumni throughout the fiscal year through events.

Advancement Services

Advancement Services led UA through an in-depth CRM evaluation and selection process, selecting UC Innovation's ascend on Salesforce for our next-generation CRM. We also selected Huron Consulting Group to lead our implementation efforts. This 18-month project will transform our technology ecosystem as well as how our colleagues do their work. The implementation of the CRM, called Lobo, is the highest priority of Advancement Services.

Here are a few highlights of Advancement Services' achievements this year:

- Completed the evaluation and selection process for the next-generation CRM, selecting UC Innovation's ascend on Salesforce.
- Implementation with our consulting partner, Huron, began in February 2023. At the close of the fiscal year, NC State has completed its first of eight sprints and is in progress with its second sprint.
- Launched Wolf Guide, an eight-week "drop" digital learning experience for new hires in Advancement.
- Achieved 12.2% reduction of gift and pledge modifications.
- For Day of Giving, processed over 15K of the 16K gifts in 24 hours; processed ~100 unique solicitation segments; implemented a self-service dashboard for DoG reporting; and implemented a DocuSign envelope status dashboard to track commitment forms out for signature.
- Implemented soft launch of DocuSign CLM to streamline the gift agreement creation process; full launch will take place in July.
- Transitioned from Sisense to Tableau for visual analytics. Tableau is the key solution in this space and will integrate with the new CRM.
- Launched BoardEx, a relationship mapping tool that identifies key relationships to assist in discovery and cultivation.
- Completed 61 portfolio reviews with major gift officers, helping them ensure that their portfolio size and make-up are appropriate for success.
- Created principal gifts suspect identification program, which identified 35 previously unengaged suspects.
- Completed first predictive modeling project to predict long-lapsed donors who could be reactivated.
- Advancement Services won six awards from CASE and the Association for Advancement Services Professionals highlighting the team's innovative, industry-leading work.
- One staff member received the Emerging Leader Award from CASE District III.
- Twelve Advancement Services staff members presented 10 times during the year on various topics at CASE conferences and at the UNC Advancement Symposium.

Finance, Administration and Talent Management

The University Advancement Office of Finance and Administration combined with the Office of Talent Management to form the new Office of Finance, Administration and Talent Management (FATM). Our combined and fully staffed team has allowed FATM to become a broad-based provider of services to our colleagues across University Advancement in all areas related to finance, budget, human resources and talent management.

Here are a few highlights of FATM's achievements this year:

- FATM became fully staffed for the first time in several years during FY23, which has enabled the unit to accomplish more in its efforts to achieve its strategic goals.
- Currently developing a new website that will include all aspects of FATM, including a public-facing site and a site that is only available to university and UA colleagues.
- Assisted in the onboarding and training of multiple new executive assistants and other administrative employees across UA.
- Worked with the new AVC for Alumni Engagement and Annual Giving to implement necessary changes to budget, finance and organizational structures that reflect NC State's vision of contemporary philanthropic engagement.
- Planned and implemented strategies to shorten the overall time of recruitment searches from posting to signed offer letter (aka "time to fill"). In calendar year 2022 UA time to fill averaged 72.98 days, compared to over 120 days for the university as a whole.
- Filled 48 postings for UA in 2022, the highest number since 2019.
- Collaborated with University Human Resources and University Development to develop and implement the Career Pathways approach for frontline fundraising positions, a career ladder tool that can be used to help retain high-performing staffers.
- Planned and executed the first UA-wide Education Day, where 196 attendees from across UA participated in two tracks of programming that provided education on a number of topics of interest to all UA employees.
- Streamlined the onboarding process for UA employees by using resources available through the university, along with customized materials specific to UA and to each office within UA.

Taskforce for Inclusion, Diversity and Equity

The UA Taskforce for Inclusion, Diversity and Equity (TIDE) made significant strides in the quest to move University Advancement from awareness to changed behavior within the Advancement maturity model. TIDE's accomplishments included providing opportunities for colleagues to share perspectives, establishing a monthly newsletter, creating an internal website, identifying systemic barriers to an inclusive culture, launching a constituent behavior workgroup, incorporating DEI into talent management and supporting the creation of an onboarding guide.

Highlights of TIDE's accomplishments include the following:

- Provided platforms for UA colleagues to share perspectives, learn from others and engage in professional development through initiatives like the Our Diverse Pack Series, Pack on the Go, TIDE Book Club, MLK Visualization Program and Understanding Generational Diversity in Today's Workplace.

- Established a monthly newsletter highlighting opportunities for active involvement and engagement. The newsletter's open rate increased from 73% in July 2022 to 80% in April 2023.
- Created an internal website on the Advancement Portal, offering resources and engagement/professional development opportunities.
- Assisted in identifying barriers to building an inclusive culture, and currently developing an implementation plan based on assessment results from the Inclusion Firm.
- Served as an advocate for initiating a Constituent Behavior workgroup; enhanced efforts to educate hiring managers on posting; and supported the creation of an onboarding guide to facilitate a more inclusive and welcoming environment for new hires.

University Communications and Marketing

Fiscal year 2022-23 was an extraordinarily successful year for the University Communications and Marketing team as we returned to a sense of consistency on campus following the pandemic, and we learned how to optimize the new hybrid mode of operations. The need to manage communications related to student mental health presented major challenges. These difficult, highly publicized issues took significant management effort to address so we could help move our campus community forward. The team fully dedicated themselves to helping the university address the crisis while continuing to focus on our mission of highlighting the many successes and innovations of our students, faculty and staff.

Here are a few highlights of this year's achievements by University Communications and Marketing:

- Executed the largest out-of-state marketing campaign in NC State history, significantly increasing brand awareness in targeted markets in Virginia and Washington, D.C.
- Earned approximately 40,000 media mentions throughout the year in many of the nation's and world's top media outlets, with a total reach of nearly 8 billion readers/viewers and a total publicity value of \$69.7 million.
- Achieved NC State's second consecutive record-breaking year in terms of trademark licensing royalties, and marked the first time the university has eclipsed \$2.5 million in royalties, a more than 20% increase over last year.
- Led NC State's Social Media Hub to more than 1 million fans/followers (777,000 on enterprise channels) across Facebook, Twitter, Instagram and LinkedIn accounts, generating more than 105 million impressions.
- Edited and sent approximately 200 emails for Day of Giving 2023 for Advancement and campus partners. These emails generated 1,750 gifts for a total gift amount of \$264,985, making email once again the No. 1 source of online donations this year.

- Created and distributed more than 500 personalized scholarship reports, including leading efforts for CHASS, PCOM and CNR (a 175% increase).
- Hosted fourth annual Pack Appreciation Day, the most successful one yet.
- Partnered with the Office for Institutional Equity and Diversity to create and execute a communications and marketing plan, including several homepage stories, Bulletin stories and social content for campus community centers, as well as videos, photography, advertising plans and more.
- Partnered with OIED to develop, launch and update NC State's Inclusive Language Guide as a valuable resource for more than 200 communicators on campus, and positioned UCOMM as a proactive leader on DEIB communications broadly.
- Completed the digital content strategy and migrations for the Colleges of Textiles and Veterinary Medicine, so that all 10 colleges at NC State are now using UCOMM's new web platform for the first time.
- Welcomed two colleges into the Excellence in Special Events Hub.
- Launched the university's first-ever Stewardship Hub, with a scholarship stewardship officer and CNR cost-share positions.
- Led Red and White Week activities, including the Chancellor's Fall Address, Red and White Night, and everything in between, including key messaging, videos, social media, advertising, web assets and in-person events.
- Reinstated the UCOMM Summer Institutes, a full-day, in-house conference designed to build and strengthen the marketing and communications community across NC State and UCOMM's leadership role in it. The conference was attended by 160 professional NC State communicators.
- Created a new version of the NC State Web Platform that now serves as the de facto universitywide content management system.
- Embarked on a future-ready organizational capacity assessment. This year-long initiative began by engaging with RHB to examine UCOMM's organization model, processes and campus alignment. The result is a detailed reorganization action plan that is now underway and will be completed in FY24.