

NC STATE UNIVERSITY

NC State University Board of Trustees

University Advancement and External Affairs Committee Meeting

April 25, 2024

Dorothy and Roy Park Alumni Center - Hood Boardroom

2450 Alumni Drive

Raleigh, NC, 27607

Ed Stack, Committee Chair

Members: Jim Harrell, Jim Holmes, Tim Humphrey, Ghazale
Johnston, Wendell Murphy, Perry Safran

Meeting Book - April 2024 University Advancement and External Affairs Committee Meeting

Meeting Agenda

10:00 am

1. Call to Order, Reading of Ethics Statement and Public Meeting Notice
Ed Stack, Chair

2. Executive Summary

3. Roll Call
Gwen McKeever, Board Professional

4. Consent Agenda
Ed Stack, Chair

A. February 15, 2024 Open and Closed Session Meeting Minutes

Action Item for Committee

B. Naming Opportunities Proposals
Ed Stack, Chair

Action Item for Committee and Full Board

5. Real Estate Development Program
Ed Stack, Chair

A. Naming Opportunities Proposal

Action Item for Committee and Full Board

6. Informational Reports

A. University Advancement Update
Brian Sischo, Vice Chancellor, University Advancement

B. External Affairs and Legislative Update
Julie Smith, Vice Chancellor, External Affairs, Partnerships, and Economic Development

a. Partnerships Update
Mark Schmidt, Associate Vice Chancellor for Partnerships

C. Advancement Services Update
Jeff Baynham, Associate Vice Chancellor, Advancement Services

7. Executive Summary - Closed Session

8. Closed Session

10. Reconvene in Open Session

11. Committee Discussion

Ed Stack, Chair

12. Adjourn

Ed Stack, Chair



NORTH CAROLINA STATE ETHICS COMMISSION

SAMPLE¹ ETHICS AWARENESS & CONFLICT OF INTEREST REMINDER

(to be read by the Chair or his or her designee at the beginning of each meeting)

In accordance with the State Government Ethics Act, it is the duty of every [Board] member to avoid both conflicts of interest and appearances of conflict.

Does any [Board] member have any known conflict of interest or appearance of conflict with respect to any matters coming before the [Board] today?

If so, please identify the conflict or appearance of conflict and refrain from any undue participation² in the particular matter involved.

Rev. 1-16-07

¹ N.C.G.S. §138A-15 (e): “At the beginning of any meeting of a board, the chair shall remind all members of their duty to avoid conflicts of interest and appearances of conflict under [Chapter 138A].” There is no set language required by the Act. Specific language can and should be tailored to fit the needs of each covered board as necessary.

² “A public servant shall take appropriate steps, under the particular circumstances and considering the type of proceeding involved, to remove himself or herself to the extent necessary, to protect the public interest and comply with this Chapter, from any proceeding in which the public servant’s impartiality might reasonably be questioned due to the public servant’s familial, personal, or financial relationship with a participant in the proceeding.” See N.C.G.S. §138A-36 (c). If necessary, the Chairman or individual member involved should consult with his ethics liaison, legal counsel, or the State Ethics Commission to help determine the appropriate response in a given situation.



Executive Summary for
University Advancement and External Affairs Committee
April 25, 2024

Agenda Item: Committee Open and Closed Session Meeting Minutes Page 6

Presenter: *Ed Stack, Chair via Consent Agenda*

Summary: The open and closed session meeting minutes from the February 15, 2024 meeting are presented.

Action: Committee Approval

Agenda Item: Naming Opportunities Proposals Page 11

Presenter: *Ed Stack, Chair via Consent Agenda*

Summary: Chancellor Woodson has endorsed and favorably recommends to the Committee and Full Board four naming opportunities proposals: one for the College of Agriculture and Life Sciences, one for the College of Engineering, one for the College of Natural Resources, and one for the NC State University Libraries.

Action: Committee Approval and Full Board Approval

Agenda Item: Naming Opportunities Proposal Page 16

Presenter: *Ed Stack, Chair via Committee Discussion*

Summary: Chancellor Woodson has endorsed and favorably recommends to the Committee and Full Board one naming opportunities proposal: one for the Real Estate Development Program.

Action: Committee Approval and Full Board Approval

Open Session Minutes

University Advancement and External Relations Committee

Board of Trustees
North Carolina State University

February 15, 2024

The University Advancement and External Relations Committee of the Board of Trustees of North Carolina State University met on February 15, 2024

Members Present: Ed Stack, Chair
 Jim Harrell
 Jim Holmes
 Tim Humphrey
 Ghazale Johnston
 Wendell Murphy
 Perry Safran

Chair Stack called the meeting to order at 10:00 am

Chair Stack reminded the Committee that the meeting will be conducted pursuant to the provisions of the Open Meetings Act and that while the Committee meeting is a public meeting, it is not a meeting for public comment and only those on the agenda will be permitted to speak. Chair Stack asked if any media representatives were present and to identify themselves. Korie Dean with the News and Observer was present. He then reminded all members of their duty to avoid conflicts of interest and appearances of conflicts of interest under the State Government Ethics Act and inquired as to whether there were any known conflicts of interest or appearances of conflict with respect to any matters coming before the Committee at this meeting.

Chair Stack then called on Gwen McKeever for the roll call. The roll was called and a quorum was present.

Consent Agenda

Trustee Safran made the motion, seconded by Trustee Humphrey, to approve the consent agenda, which included the open and closed session minutes from the November 2, 2023 meeting, as well as the naming opportunities proposals for the College of Agriculture and Life Sciences, College of Natural Resources, and Wilson College of Textiles. The motion passed.

Informational Reports

University Advancement Update

During the University Advancement update, Vice Chancellor Brian Sischo shared that Lisa Marie Ferrell was hired as our new Chief Communications and Marketing Officer, with a start date of March 1. Lisa Marie comes to NC State with exceptional communications and marketing experience, most recently at Lenova here in the Triangle, and previously at UNC-Chapel Hill. He also shared that Chancellor Randy

Woodson was awarded the Council for Advancement and Support of Education Chief Executive Leadership Award for his exceptional work in advancing NC State through philanthropy.

Vice Chancellor Sischo provided an update on the Celebrating Transformation Initiative and highlighted two featured priorities: the Chancellor's Transformational Endowment Fund and Integrative Sciences Building. He concluded with a synopsis of Day of Giving over the past five years in anticipation of our 6th annual Day of Giving in about 30 days on March 20, 2024.

External Affairs Update

Vice Chancellor Julie Smith provided an external affairs update highlighting some of the recent activity within the division of External Affairs, Partnerships, and Economic Development. She also gave a legislative update previewing the upcoming short session of the North Carolina General Assembly which begins in April. The update included legislative priorities which have been submitted to the UNC System Office on behalf of NC State.

University Alumni Engagement and Annual Giving

Associate Vice Chancellor Reshunda Mahone showcased the significant progress Alumni Engagement and Annual Giving has made towards integrating engagement and giving opportunities across NC State. The progress includes the addition of the Alumni Engagement and Annual Giving Roundtable with campus partners, cross campus collaborations, and the UA Communication calendar. The expansion of the Alumni Association has increased career development opportunities and launched graduate student initiatives.

Closed Session

With no further business in open session, Trustee Harrell made the motion, seconded by Trustee Humphrey, at 10:54 am to go into closed session. The motion carried.

Reconvene in Open Session

After coming out of closed session, Chair Stack announced the meeting in open session at 11:07 am.

Adjournment

With no further business, Char Stack announced the meeting adjourned at 11:08 am.

Submitted by Gwen McKeever, Secretary

Approved by:

Ed Stack, Chair

Board of Trustees Consent Agenda University Advancement Committee Proposed Naming Opportunities

April 25, 2024

Background

As per *POL 03.00.02 – Criteria and Procedures for Naming Facilities, Programs and Funds*, the act of naming a facility or program shall be that of the Board of Trustees, acting after receiving the recommendation of the Chancellor.

Recommended Action

Chancellor W. Randolph Woodson recommends to the Board of Trustees the following proposed naming opportunities.

Overview

- **Total Naming Opportunities Proposals:** 4
- **Total Facility Proposals:** 4
- **Total Program Proposals:** 0
- **Total Naming Opportunities:** 13
- **Total Gift Amount:** \$2,600,000
- **Colleges/Units Represented:**
 - College of Agriculture and Life Sciences
 - College of Engineering
 - College of Natural Resources
 - NC State University Libraries

College of Agriculture and Life Sciences

Apiculture Research and Extension Facility

The new Apiculture Research and Extension Facility will provide research and training spaces for the NC State programs that serve the state's beekeepers.

- **Naming Type:** New spaces
- **Total Naming Opportunities:** 6
- **Total Gift Amount of Naming Opportunities:** \$325,000
- **Purpose of Funds:** Gifts will support the Apiculture Research and Extension Facility.

Continued on the following page

College of Engineering

Board of Trustees Consent Agenda University Advancement Committee Proposed Naming Opportunities

April 25, 2024

Selected Laboratories, Engineering Building III

The five proposed laboratories are used by the Department of Mechanical and Aerospace Engineering (MAE), which is housed in Engineering Building III on Centennial Campus. In addition to MAE, the building is also home to the Joint NC State-University of North Carolina Department of Biomedical Engineering.

- **Naming Type:** Existing spaces
- **Total Naming Opportunities:** 5
- **Total Gift Amount of Naming Opportunities:** \$1,500,000
- **Purpose of Funds:** Gifts will support the Department of Mechanical and Aerospace Engineering (MAE).

College of Natural Resources

Faculty Cabin, Slocum Camp at Hill Forest

Slocum Camp's historic Faculty Cabin, also known as the CCC Cabin, is one of the original 1935 log cabins built by the Civilian Conservation Corps (CCC). It housed all camp directors from the 1930s to 2000 and is fondly remembered by decades of alumni. It is currently the primary office of the Conservation Corps of North Carolina, the successor of the CCC.

- **Naming Type:** Existing space
- **Total Naming Opportunities:** 1
- **Total Gift Amount of Naming Opportunities:** \$25,000
- **Purpose of Funds:** Gifts will support the renovation and maintenance of Slocum Camp.

NC State University Libraries

eSports Pilot Arena (Room 4403), James B. Hunt, Jr. Library

The eSports Pilot Arena is the first phase of NC State's cutting-edge eSports program that will leverage state-of-the-art technology, new facilities and the growing influence of the gaming industry in the Triangle region. Completion of the permanent arena in Mann Hall is scheduled for 2027.

- **Naming Type:** Renovated space
- **Total Proposed Naming Opportunities:** 1
- **Total Gift Amount of Proposed Naming Opportunities:** \$750,000
- **Purpose of Funds:** Gifts will support eSports programming, environments and learning experiences.

**Board of Trustees Consent Agenda
University Advancement Committee
Proposed Naming Opportunities**

April 25, 2024

Policy References

POL 03.00.02 – Criteria and Procedures for Naming Facilities, Programs and Funds



April 25, 2024

MEMORANDUM

TO: Board of Trustees
FROM: W. Randolph Woodson, Chancellor
SUBJECT: Proposed Naming Opportunities

We request board approval for the following proposed naming opportunities:

College of Agriculture and Life Sciences

Apiculture Research and Extension Facility

The College of Agriculture and Life Sciences proposes six naming opportunities for a new Apiculture Research and Extension Facility.

College of Engineering

Selected Laboratories, Engineering Building III

The College of Engineering proposes five naming opportunities in Engineering Building III.

College of Natural Resources

Faculty Cabin, Slocum Camp at Hill Forest

The College of Natural Resources proposes a naming opportunity in Slocum Camp at Hill Forest.

NC State University Libraries

eSports Pilot Arena, James B. Hunt, Jr. Library

The NC State University Libraries proposes a naming opportunity in James B. Hunt, Jr. Library.

Office of the Executive Vice Chancellor and Provost

Real Estate Development Program

The Office of the Executive Vice Chancellor and Provost proposes a program naming opportunity.



April 25, 2024

MEMORANDUM

TO: W. Randolph Woodson, Chancellor
FROM: Brian C. Sischo, Vice Chancellor, University Advancement
SUBJECT: Proposed Naming Opportunities

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The Office of the Executive Vice Chancellor and Provost proposes a program naming opportunity.

Board of Trustees University Advancement Committee Proposed Naming Opportunities

April 25, 2024

Background

As per POL 03.00.02 – *Criteria and Procedures for Naming Facilities, Programs and Funds*, the act of naming a facility or program shall be that of the Board of Trustees, acting after receiving the recommendation of the Chancellor.

Recommended Action

Chancellor W. Randolph Woodson recommends to the Board of Trustees the following proposed naming opportunity.

Overview

- **Naming Opportunities Proposal:** 1
- **Total Facility Proposals:** 0
- **Total Program Proposals:** 1
- **Total Naming Opportunities:** 1
- **Total Gift Amount:** \$5,000,000
- **Unit Represented:**
 - Office of the Executive Vice Chancellor and Provost

Office of the Executive Vice Chancellor and Provost

Real Estate Development Program

The Real Estate Development Program promotes community building through placemaking by fostering student and professional growth in design-focused education and applied research. Its interdisciplinary approach is reflective of the real estate development profession, where a team of disciplines work together to envision, plan and build a development project. The program has a phased growth plan: an existing certification program to ultimately a master's degree in real estate and an undergraduate minor.

- **Naming Type:** Program
- **Total Proposed Naming Opportunities:** 1
- **Total Gift Amount of Proposed Naming Opportunities:** \$5,000,000
- **Purpose of Funds:** Gifts will support the Real Estate Development Program.

**Board of Trustees
University Advancement Committee
Proposed Naming Opportunities**

April 25, 2024

Policy References

POL 03.00.02 – Criteria and Procedures for Naming Facilities, Programs and Funds

NC STATE
UNIVERSITY

University Advancement Update

Brian Sischo

Vice Chancellor

University Advancement

NC State University Board of Trustees

April 25, 2024



Welcome Lisa Marie Ferrell

**Associate Vice Chancellor
Chief Communications and Marketing Officer**



University Advancement Senior Leadership

Brian Sischo
Vice Chancellor, University Advancement

Stephanie Money
Chief of Staff & Director of University Advancement

Gwen McKeever
Executive Assistant

Jeff Baynham
Associate Vice Chancellor, Advancement Services

Reshunda Mahone
Associate Vice Chancellor, Alumni Engagement & Annual Giving

Lisa Marie Ferrell
Associate Vice Chancellor, University Communications Chief Communications Officer

Jim Broschart
Associate Vice Chancellor, University Development

Derek Bryan
Assistant Vice Chancellor, Finance, Administration & Talent Management

Alan Taylor
Assistant Vice Chancellor, Principal Gifts

Ellen Klingler
Assistant Vice Chancellor, University Special Events and Experiences

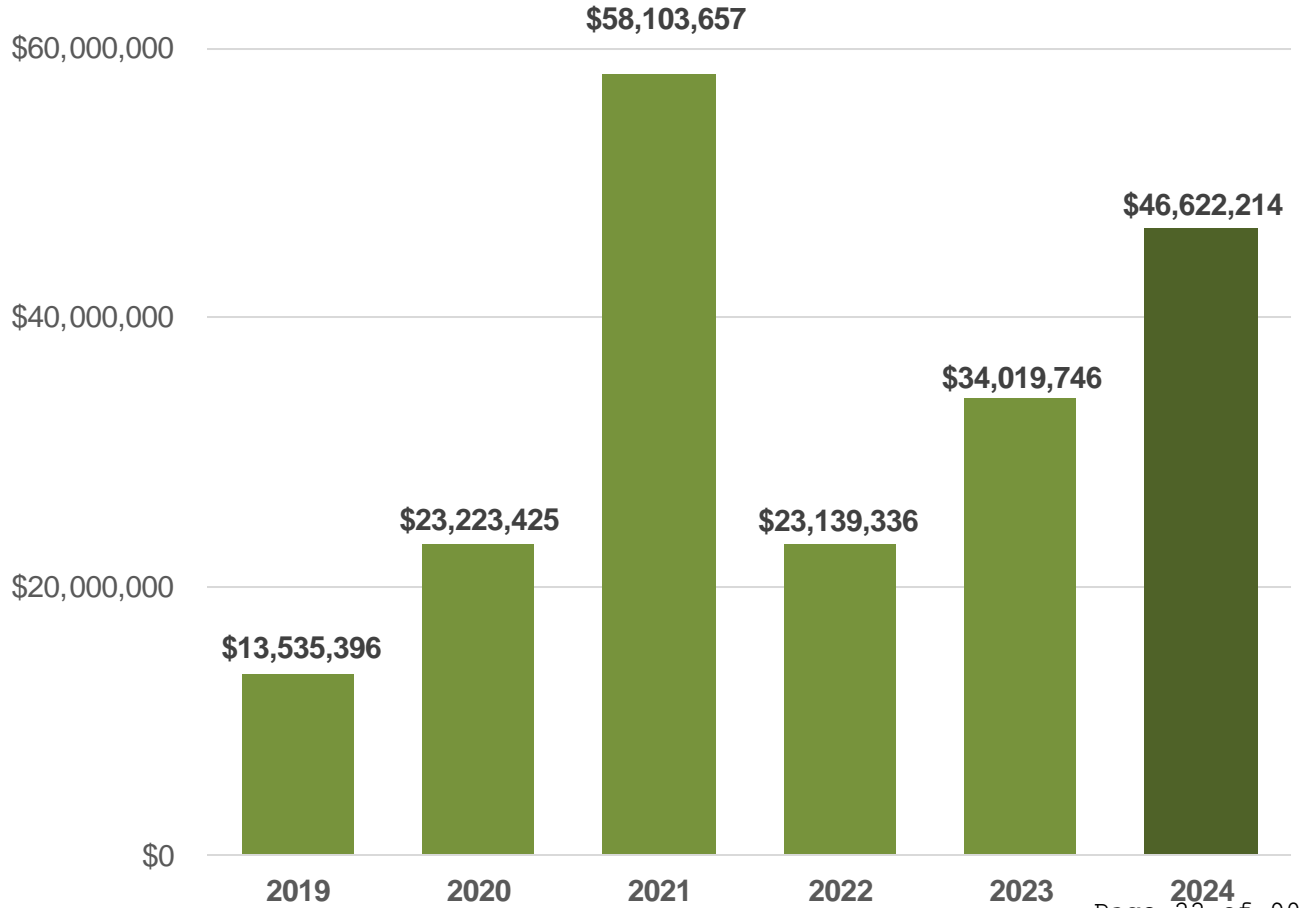


NC STATE
DAY OF GIVING
03.20.24



 **Dollars**

6-year average is
\$33,105,212
244.5% increase in
dollars from 2019

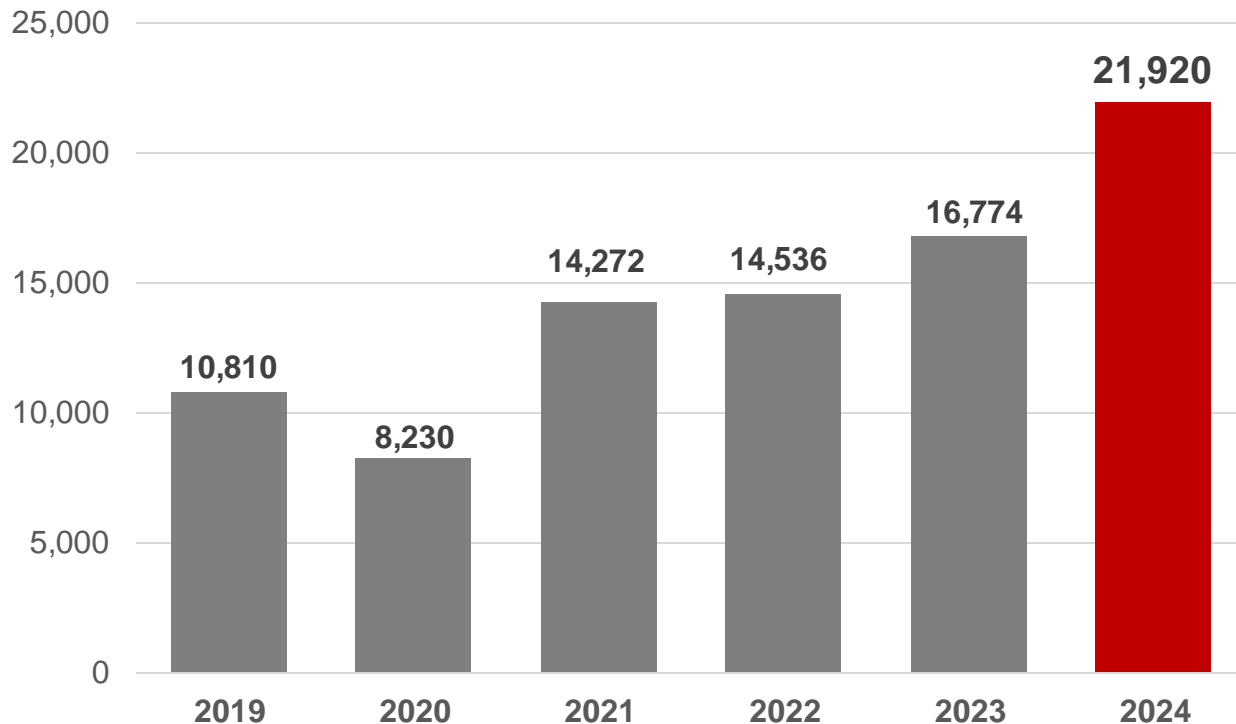




Gifts

Most gifts received in NC State Day of Giving history

102.8% increase in gifts from 2019



Day of Giving

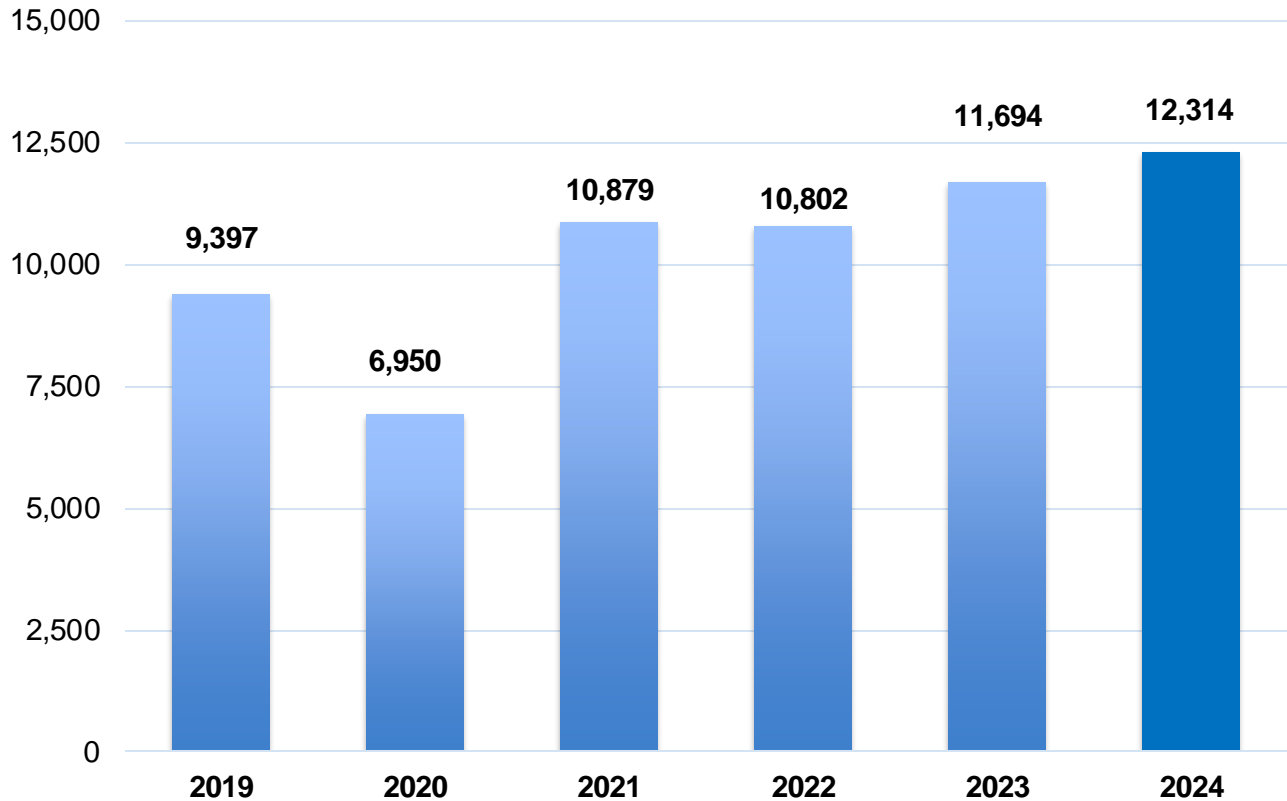
The Fellowship of the Tattoo



21,920 Gifts

Donors

31% increase in donors from 2019
1,938 New Donors





#GivingPack

Unit Leaderboard

Total Dollars



Year	Unit Winner	
2024	College of Agriculture and Life Sciences	
2023	College of Veterinary Medicine	
2022	College of Agriculture and Life Sciences	
2021	College of Veterinary Medicine	
2020	College of Veterinary Medicine	Wilson College of Textiles
2019	College of Veterinary Medicine	College of Design

UNIT	TOTAL DOLLARS ▼	% OF BONUS	BONUS
1. College of Agriculture and Life Sciences	\$6,707,810	19%	\$5,566
2. College of Veterinary Medicine	\$5,957,302	16%	\$4,944
3. College of Engineering	\$4,882,084	14%	\$4,051
4. Wilson College of Textiles	\$3,714,028	10%	\$3,082
5. Athletics	\$3,500,456	10%	\$2,905
6. College of Sciences	\$3,353,033	9%	\$2,782
7. College of Natural Resources	\$2,290,063	6%	\$1,900
8. NC State University Libraries	\$1,801,896	5%	\$1,495
9. College of Humanities and Social Sciences	\$1,789,354	5%	\$1,485
10. Poole College of Management	\$818,256	2%	\$679
11. Academic and Student Affairs	\$591,473	2%	\$491
12. College of Education	\$444,793	1%	\$369
13. College of Design	\$301,080	1%	\$250

Unit Leaderboard

Total Gifts

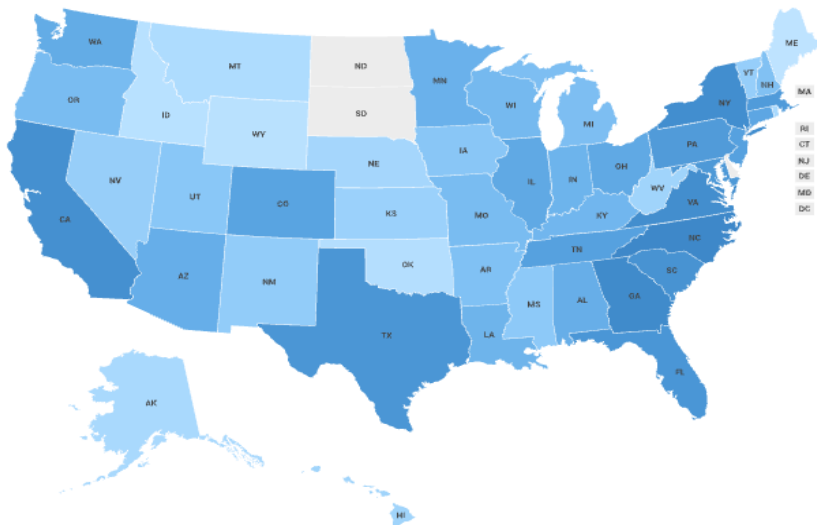


Year	College/Unit Winner	
2024	Poole College of Management	
2023	Division of Academic and Student Affairs	
2022	Division of Academic and Student Affairs	
2021	Division of Academic and Student Affairs	
2020	College of Engineering	DASA
2019	College of Engineering	DASA

UNIT	TOTAL GIFTS ▼	BONUS
1. Poole College of Management	3,193	\$5,500
2. Academic and Student Affairs	2,564	\$4,500
3. College of Engineering	2,031	\$3,500
4. College of Agriculture and Life Sciences	1,802	\$3,000
5. College of Humanities and Social Sciences	1,300	\$2,750
6. College of Sciences	1,109	\$2,500
7. College of Natural Resources	1,046	\$2,000
8. College of Education	992	\$1,750
9. Athletics	972	\$1,500
10. Wilson College of Textiles	715	\$1,250
11. College of Design	579	\$1,000
12. College of Veterinary Medicine	530	\$500
13. NC State University Libraries	336	\$250



Turn it Blue!



#50

#25

#1

TOP 10 STATES BY GIFTS

1	North Carolina	5,351
2	Georgia	312
3	Virginia	281
4	New York	204
5	California	167
6	South Carolina	151
7	Texas	139
8	Florida	133
9	Maryland	116
10	Pennsylvania	110

Around Campus



Around Campus



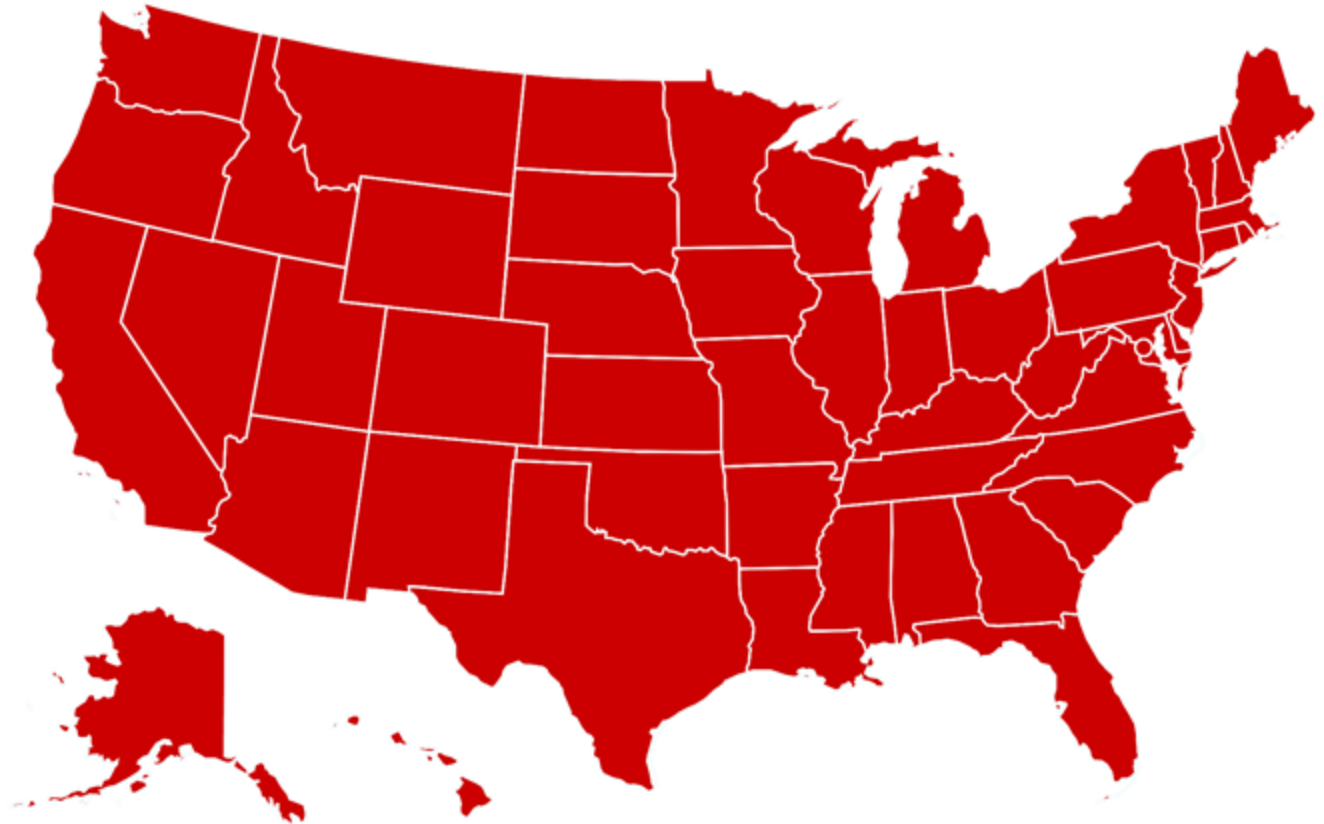
Day of Giving Board Participation



- 67% Board of Trustees participation
- 83% Board of Visitors participation
- 13 boards had 100% participation
- 94% of all board members participated

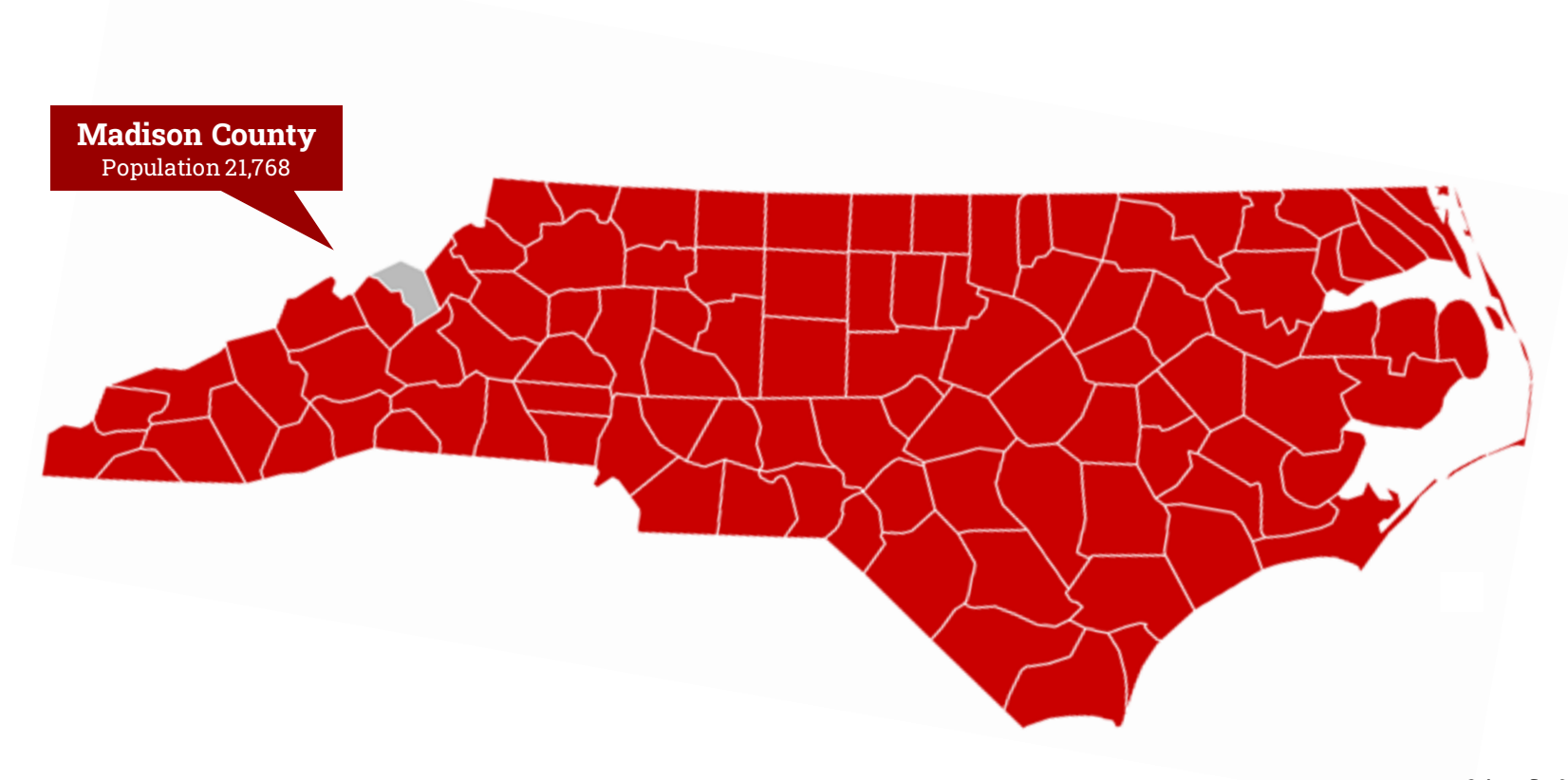
Collectively our boards raised over \$5.2 million from 6,386 gifts

All 50 States



20 Countries

99 NC Counties

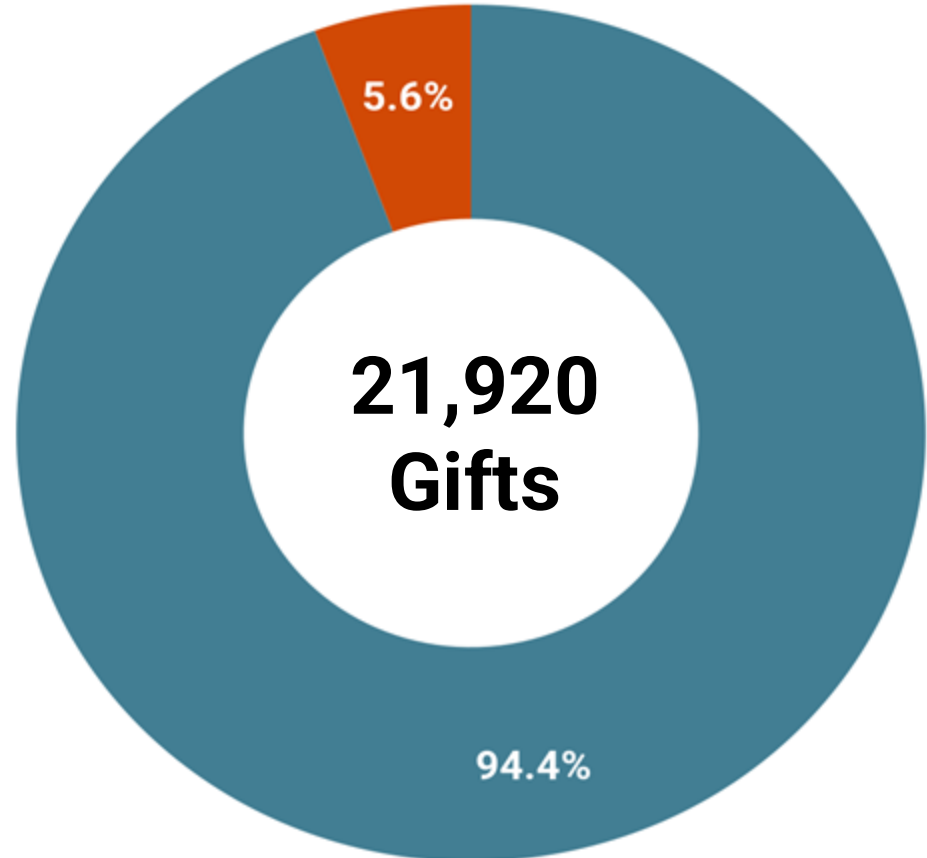


Madison County

Population 21,768

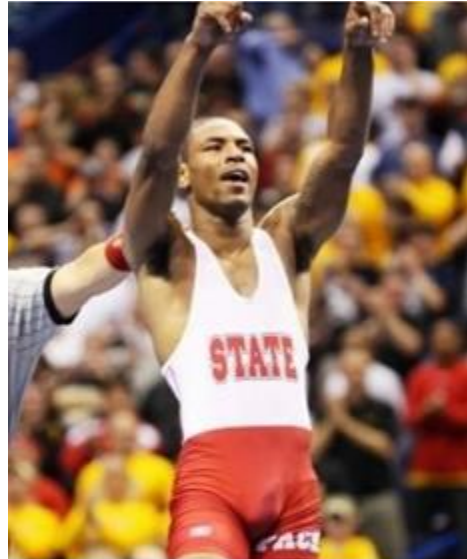
Online vs. Offline Gifts

**6 Year
Averages:
Online: 90.9%
Offline: 9.1%**



Offline
Online

Social Media: Influencers



1,083 likes
thewolfmma "It's important to remember your roots. Today is my alma mater's Day of Giving, so I'm reflecting back on some of the best memories I made in Raleigh. Once a part of the Pack, always a part of the Pack. Visit @NCState's profile or dayofgiving.ncsu.edu to learn more about how you can join me in #GivingPack to support current and future members of the Wolfpack."



Liked by nctestalumni and 647 others
americanaquarium If you know me, you know how important North Carolina State University is to me and my family. It's not just my alma mater. It's the place where I found myself, my calling, my purpose. It's an integral part of who I am as a person. On @NCState Day of Giving, I'm reflecting on how my time at @ncstatechass helped me find my creative voice and shaped my future. Join me in #GivingPack today to support current and future NC State students and as always, Go Pack!!! 🐺 🐺 🐺


<http://ncst.at/2laE50QVwvc>

@joey_wharton




Liked by nctestatecals and 365 others
beedowntown "Every year on @ncstate Day of Giving, I take a moment to reflect on how lucky I am to be a part of the Wolfpack community. Since graduation, I've had the honor of cheering on the Pack as the homecoming speaker, installing beehives on Centennial Campus, being interviewed by our chancellor, being named an Outstanding Young Alumni of the university, and making sure to always continue to support my Pack at Carter-Finley game days."



**NC State Graduate School**

We did it! 🎉 We not only met our gift goal, we've exceeded it and there's still time to support graduate education. As the clock ⌚ counts down will you be the last one to hit the donate button? Your perfect timing could be rewarded with a \$1K bonus to the GradPack! **#GivingPack**



WE DID IT!
136 Gifts

WE START DAY OF GIVING 03.20.24


🗨️ 🔄 ❤️ 20 Mar 2024

#GivingPack on Inst... 4d



Barkster Boys are happy to participate in the Pack Pets Challenge for NC State Vet Med **#GivingPack** **#barksterboys** **ncstatevetmed**







**NC State Humanities and Social Sciences**

A record-breaking **#GivingPack** for our college 🥳


Thank you to all of our donors and students for making this Day of Giving one to remember!

#NCStateCHASS



		
\$1.7M	1,300	4
<small>\$10,125</small>	<small>15%</small>	<small>100,000</small>


🗨️ 🔄 ❤️ 21 Mar 2024

**NC State College of Design**


Yesterday, **#GivingPack** made a 🌟 record-breaking 🌟 impact at the College of Design.

- 🎁 579 gifts made (our highest ever)
- 👉 \$301,080 raised for design education
- 👉 One Pack brought together for a cause

Thank you all for your donations, your stories and your support. ❤️




🗨️ 🔄 ❤️ 21 Mar 2024

**NC State College of Agriculture, Life and Environmental Sciences**

On Day of Giving, our CALS Pack showed up in record-breaking ways. 🏆 Through your support, CALS is able to continue to shape the future of agriculture and life sciences—in the lab, the classroom and the field.

We cannot thank you enough for **#Giving-Pack!**



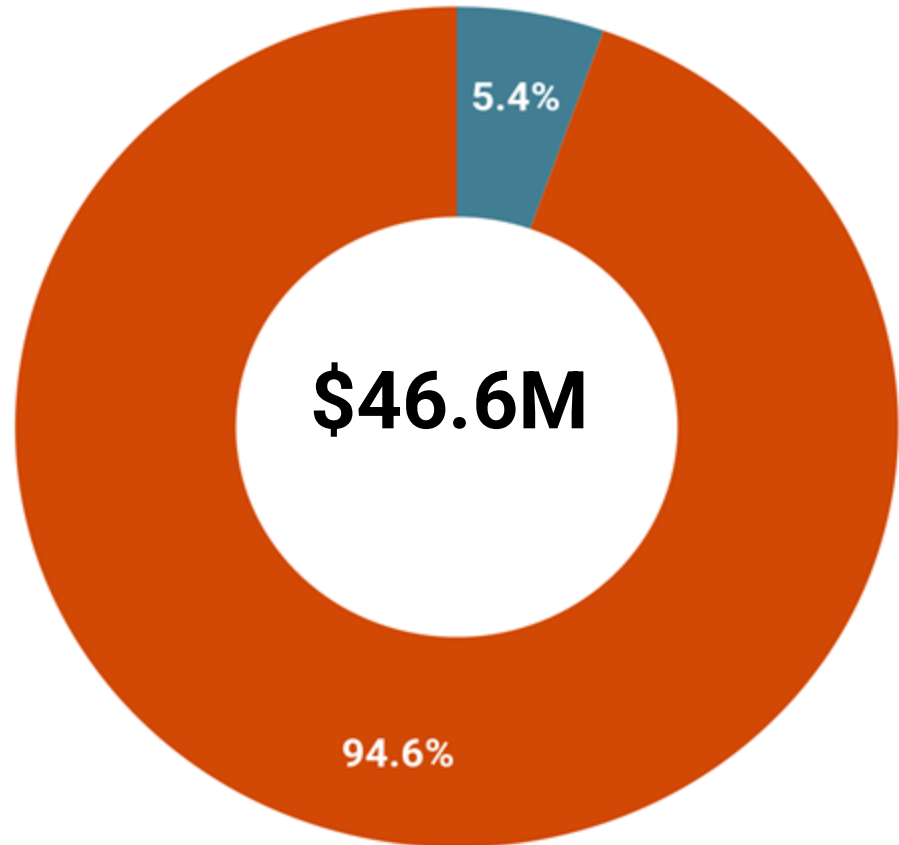
THANK YOU!
For #GivingPack CALS!

\$6.7M **1,800**
total raised total gifts

🗨️ 🔄 ❤️ 21 Mar 2024

Online vs. Offline Dollars

**6 Year Averages:
Online: 5.6%
Offline: 94.4%**



Major Gifts

17 Day of Giving donors' first time gift to NC State was \$50K+

171 donors made a \$50K+ gift

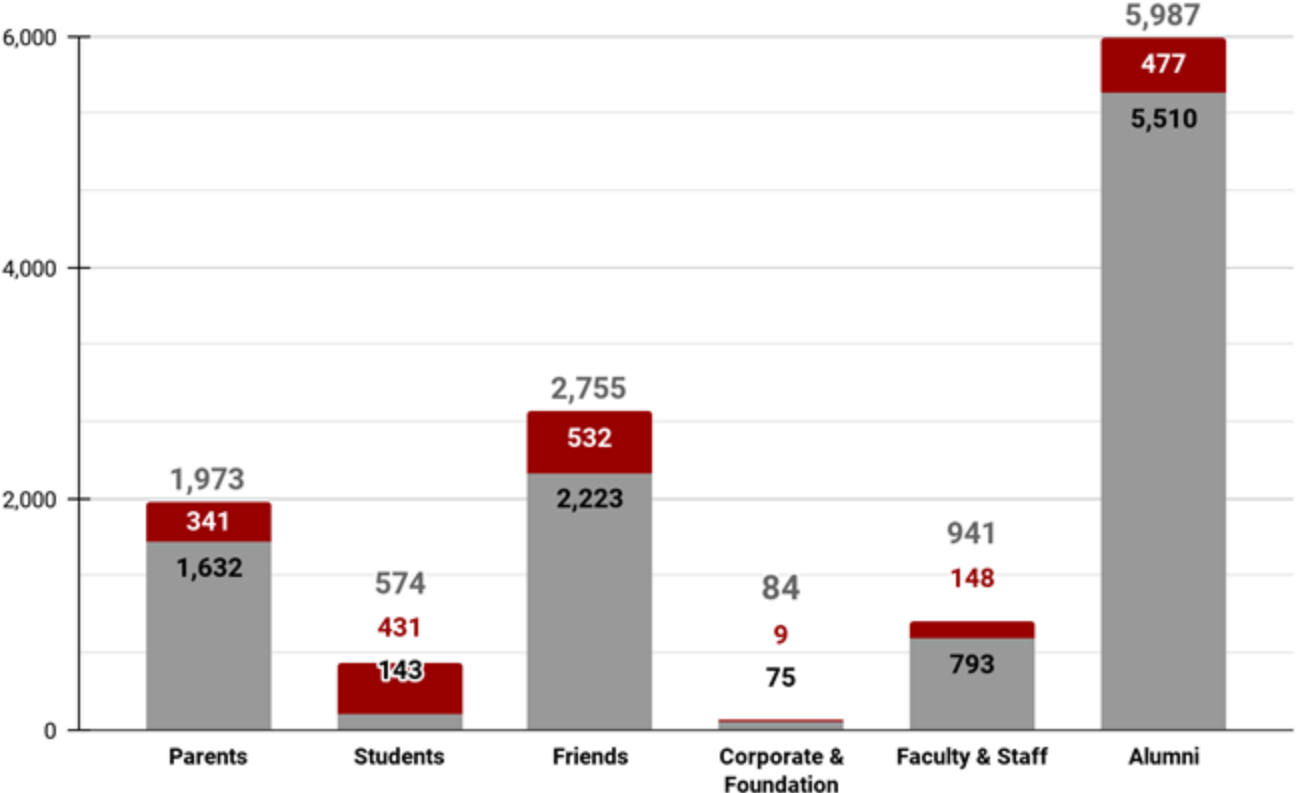
11	57	119
11 gifts of \$1 million or more	57 gifts of \$100,000 or more	119 gifts of \$50,000 or more
One gift of \$10 million		

New and Existing Donors

■ New Donors
■ Existing Donors

12,314 Total Donors
1,938 New Donors
(15.7%)

67.6% of Day of Giving donors made their first FY24 gift on Day of Giving



Based on primary record type

Alumni Donors by Decade

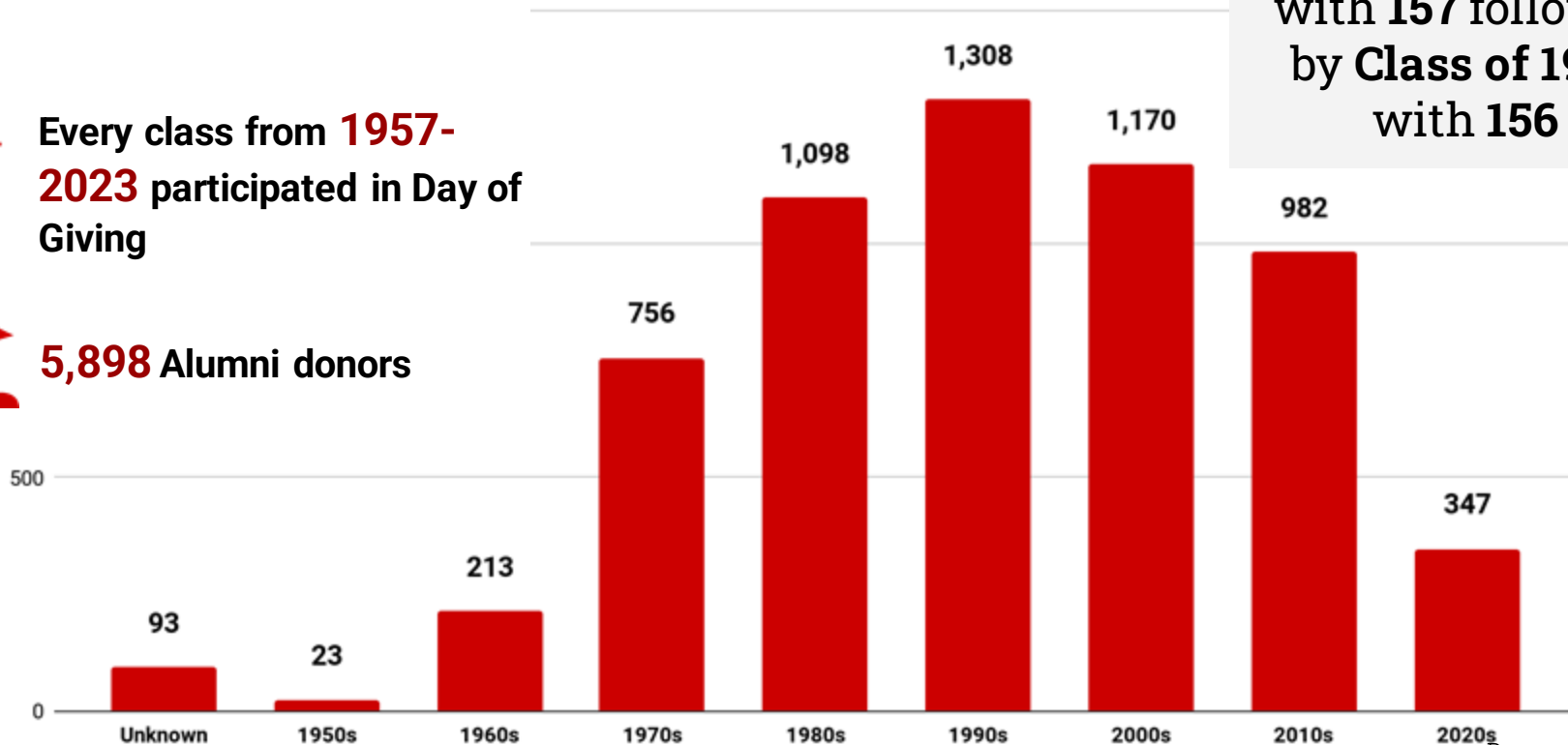
Class of 1994 had the most donors with **157** followed by **Class of 1993** with **156**



Every class from **1957-2023** participated in Day of Giving

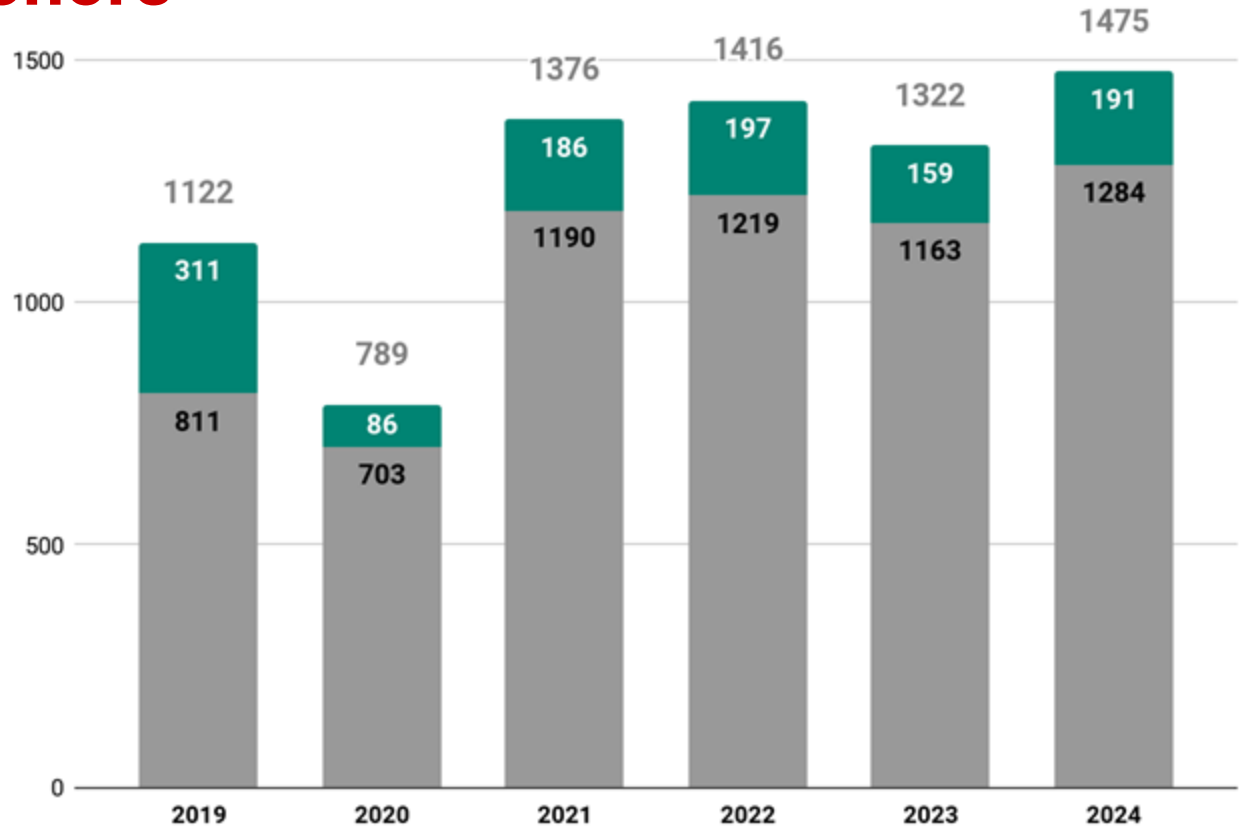


5,898 Alumni donors



Faculty & Staff Donors

■ New Donors
■ Existing Donors



53 F/S increased or started a new Payroll Deduction

6,425 gifts from F/S



Wolfpack Games!

Wolfpack Games

Activity-course challenge



Coach Henes



Ice cream sundae making challenge



Coach Doeren

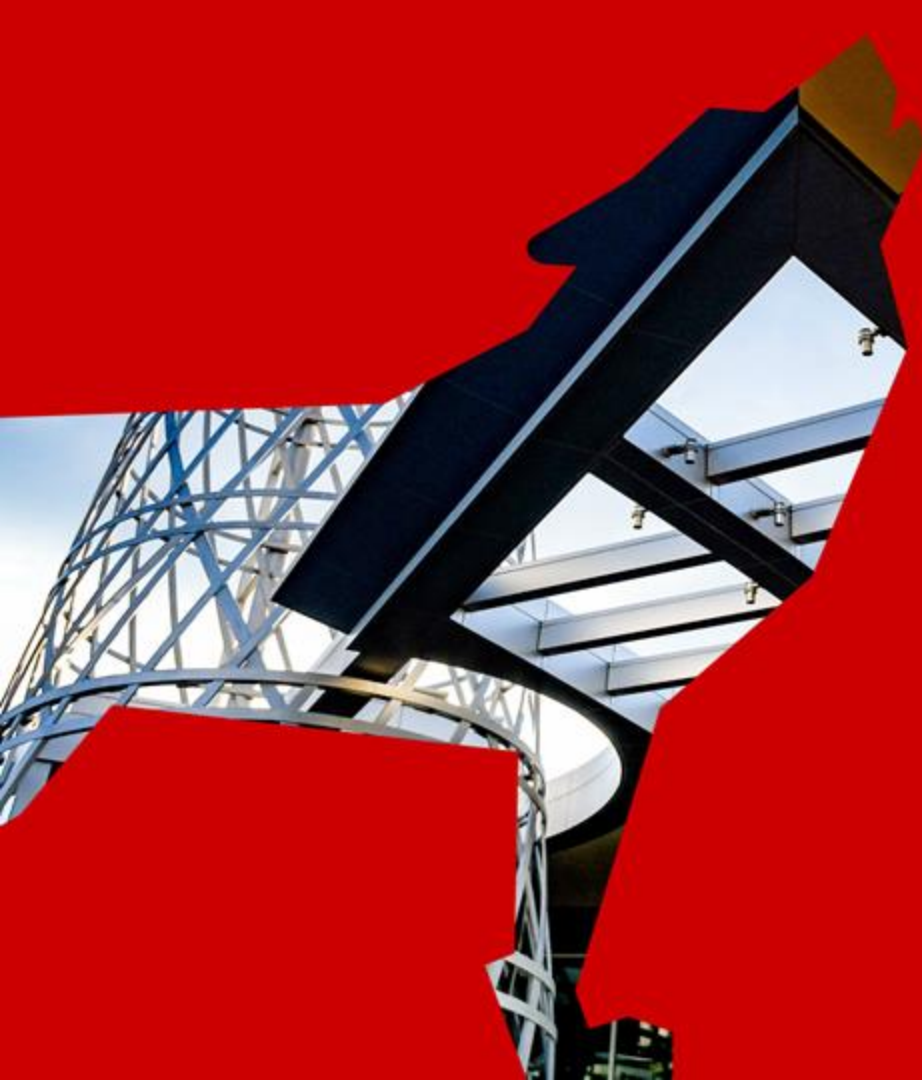


Giant Jenga challenge



Coach Henes





NC STATE

**DAY OF
GIVING**

03.26.25

Save the date
Red and White Week
October 27 – November 2, 2024



Questions?





External Affairs, Partnerships and Economic Development

Julie Smith
Vice Chancellor



2024 Legislative Short Session

Began Wednesday, April 24th at Noon

Revenue Outlook

- Remainder of FY 2023-24: +\$413M (1.2%)
- FY 2024-25: +\$1B (3%)

UNC System Budget Priorities

- Performance-Weighted Enrollment Change Funding
- Labor Market Adjustment Fund (LMAR)
- FY24 Nonrecurring Appropriations Do Not Revert

North Carolina–Japan Economic Relations

NC State's Vital Role



TOYOTA

KYOWA KIRIN

HITACHI
ABB

RICOH

HondaJet

NAGOYA
UNIVERSITY



Office of Partnerships – 5-Year Impact



60
New
Partners



\$128M
Industry
Funding
44% Increase YoY



2,000+
Students
Hired



8
MRAs
Signed

Industry Research Expenditures (FY22, NSF HERD data)

Among all public universities without a medical school

	Institution	\$ Millions
1	SUNY	\$169.1M
2	Wichita State	\$120.4M
3	Georgia Tech	\$82.5M
4	Louisiana, Lafayette	\$74.7M
5	Purdue	\$69.4M
6	California, Berkeley	\$69.1M
7	NC State	\$53M
8	Virginia Tech	\$37M
9	Nebraska, Lincoln	\$19.8M
10	California, Santa Barbara	\$16.3M

EASTMAN

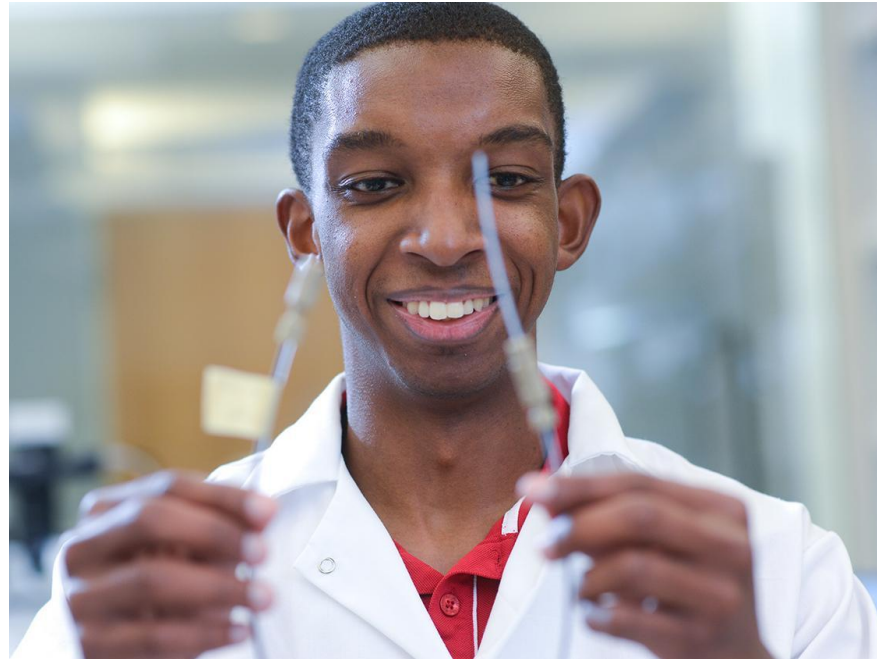
114 Funded projects

70 Co-op students

39 Graduates hired

45 Invention disclosures

\$20M Invested in research



NOVO
NORDISK
FONDEN

- Three funded projects currently totaling ~\$60M (BIG Collaboration, CCRP and AIM-Bio).
- Strategically growing the partnership, including hiring a dedicated liaison, with several development areas:
 - Continuing research collaborations
 - New research areas
 - Growing partnerships within Danish ecosystem (e.g., universities, ICANN, venture)
 - Kalundborg Educational Campus



Chancellor Woodson signed a strategic partnership agreement with Technical University of Denmark (May 2023).



UNDER ARMOUR

- Co-signed a master research agreement and Under Armour opened its innovation center on Centennial Campus (December 2022).
- Under Armour Founder and CEO visited campus (August 2023) to meet with Chancellor Woodson and key collaborators – outlining shared goals and strengthening the strategic partnership.
- Recent outcome: launching a new fiber that will be an innovative alternative to spandex. NEOLAST™ unlocks the potential to recycle stretch fabrics, providing significant performance and sustainability benefits.



FUJIFILM

Diosynth
biotechnologies

- Announced strategic partnership and co-signed master research agreement (November 2022).
- Through BTEC, NC State has provided advanced training to 200+ employees.
- Research collaborations with College of Design on a sustainable site development plan for the new Holly Springs campus.
- Project Aura (announced April 2024) will create an additional 680 jobs and \$1.2B in capital investment to expand the Holly Springs location. NC State relationship was a key driver in their decision.



Ricoh Opens Center of Excellence on Centennial Campus

- Collaborating with CAMAL to solve supply chain challenges through 3D printing.
- New workforce development program for undergraduate and graduate students offers paid interns a practical understanding of business applications.
- Ricoh will initially invest \$1.8 million in the Centennial Campus office, and plans to partner with several other NC State colleges and centers.



Business Sustainability Roundtable

- Jointly created by NC State’s Office of Partnerships with the Raleigh Chamber and Fujifilm Diosynth, the BSR is a program to advance community sustainability through business leadership.
- First-of-its-kind strategic initiative that will help position North Carolina to attract more leading companies that value sustainability leadership – and strengthen economic development.



Recent Economic Development Collaboration Examples

AUDEMARS PIGUET

Le Brassus

- **Project Beyond:** Switzerland-based luxury watchmaker moved its North American Service Center to Raleigh, creating 105 jobs and investing \$22 million.

+ KEMPOWER

- **Project Fast:** Finland-based manufacturer of electric vehicle chargers selected Durham to establish its first U.S. facility, resulting in 600 new jobs and a \$41 million capital investment.



**#1 State
for Business**

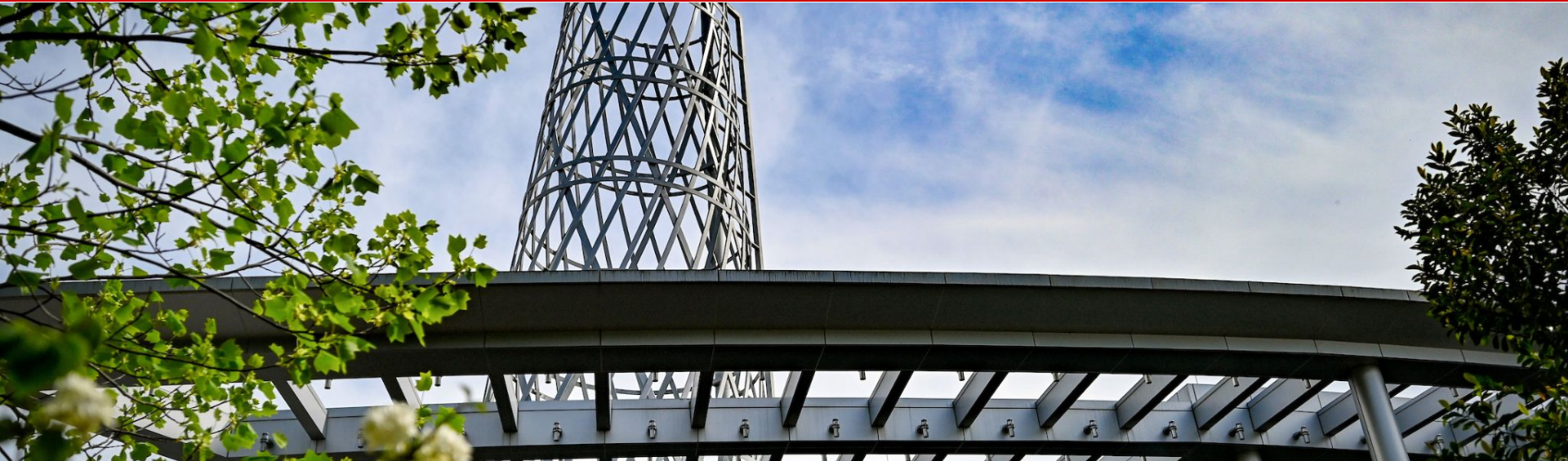
CNBC, 2022 and 2023

Chancellor Woodson Receives AURP Leadership Award

“Chancellor Woodson’s leadership has been tremendous and enabled the campus to grow to what it is today. This award highlights his achievements and also the success of NC State and its globally-recognized Centennial Campus.”

– UNC System President Peter Hans





Questions?

NC STATE
UNIVERSITY

Board of Trustees

April 25, 2024

Advancement Services Update

Jeff Baynham

Associate Vice Chancellor

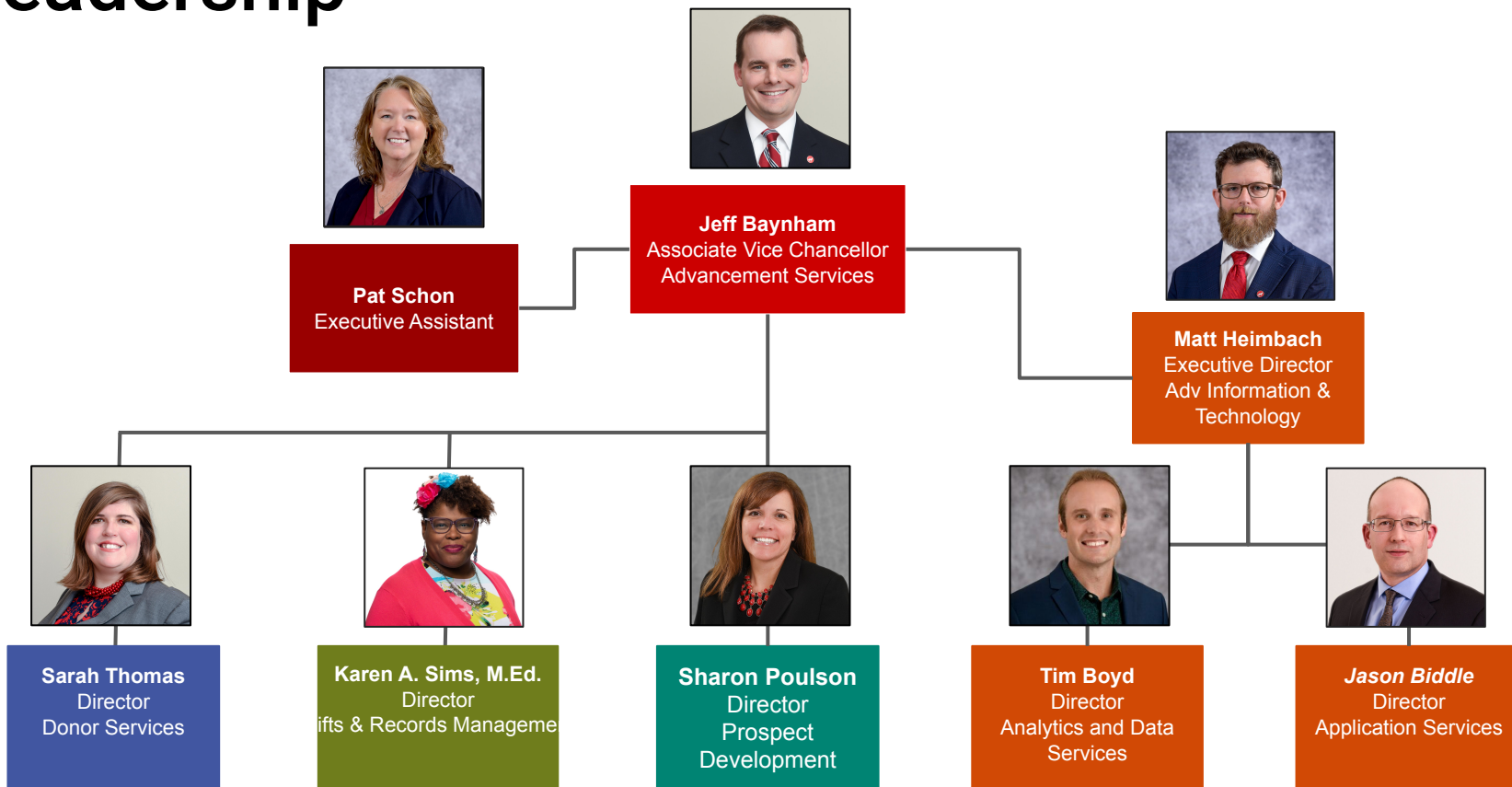




Vision

Elevate philanthropy and engagement at NC State University by providing ***innovative, impactful, best-in-class resources and solutions*** for our colleagues, alumni and donors.

Leadership



FY23 by the numbers

Donor Services

- 439** Gift agreements approved
- 141** Naming opportunities approved
- 18** Donor Namings
- 9** Distinguished Professorships

FY23 by the numbers

Gifts & Records Management

68,212	Gifts and pledges processed
528,820	Biographical elements updated
2,320	Matching gift claims received
\$765,212	Matching gift funds received

FY23 by the numbers

Prospect Development

2,031	Referrals to MG team for qualification
\$797M	Total gift capacity referred
378	Research requests completed
9,648	Prospect management requests completed

FY23 by the numbers

Advancement Information Technology

- 800+** Completed report request
- 9** New interactive dashboards created
- 200+** Solicitation segments created & sent
- 11** Institutional surveys completed

FY23 by the numbers

Advancement Training

1,621	Participants
95.5	Led hours of training
49	Training sessions
110	Learning articles



NC STATE

Next Generation CRM



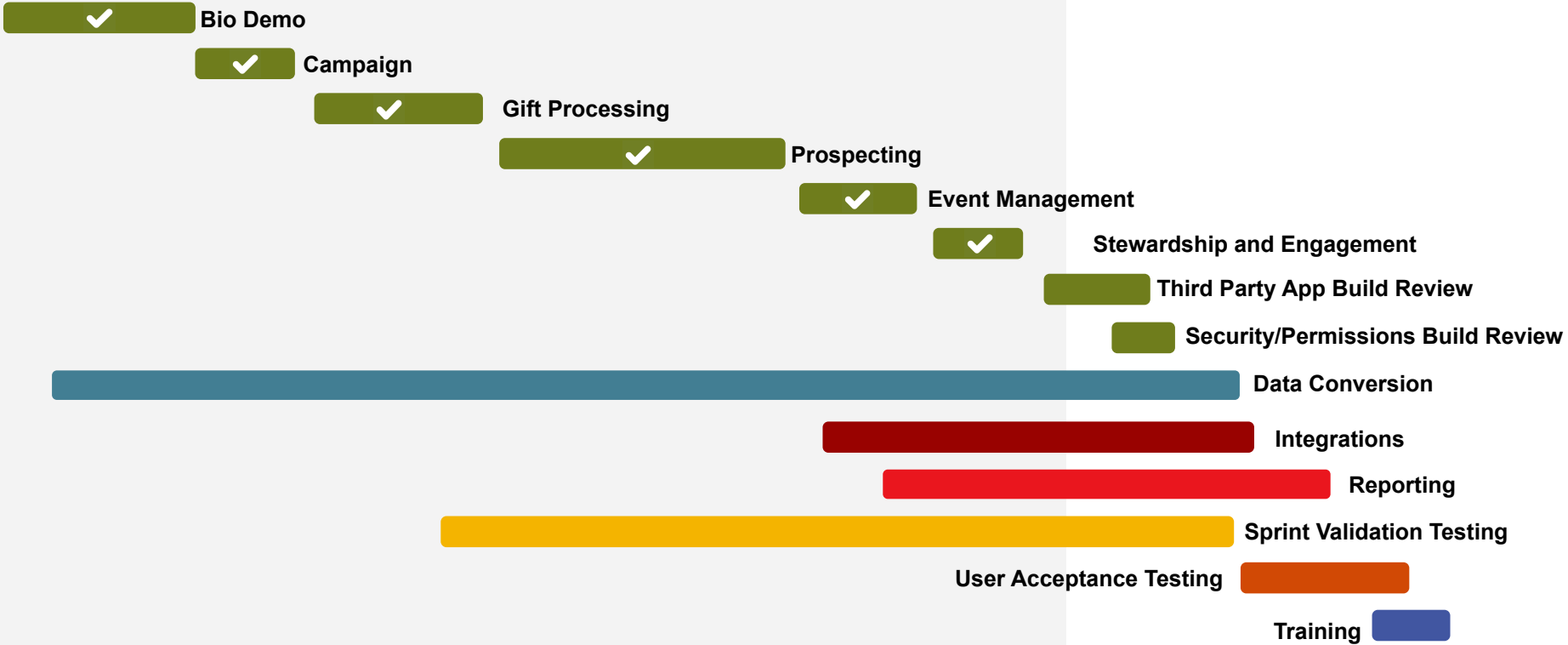
ascend
Advancement Solutions by **UCINNOVATION**



Lobo will increase...

Engagement	Staff Productivity	Data & Analytics	Fundraising
<ul style="list-style-type: none"> ● Tracking of constituent interests, behaviors, touchpoints ● Single events platform ● Volunteer opportunities ● Dynamic engagement scoring ● Constituent Portal 	<ul style="list-style-type: none"> ● Automate workflows ● Eliminate redundancy ● System consolidation ● Ease-of-use ● Modern data infrastructure ● Staff can focus on high-value work 	<ul style="list-style-type: none"> ● Analytic-driven reporting/dashboards unique to each gift staff person ● Quicker, self-service delivery reporting ● Tableau visual reporting ● Analytics & AI create “nudge” opportunities 	<ul style="list-style-type: none"> ● Increase in gifts ● Increase average gift size ● Increase donor retention ● Increase in prospect and solicitation conversion rate ● Decrease in time-to-gift in cycle

Zuri Group study showed 14.6% increase in fundraising within two years of CRM



2023

Today

2024

Go Live



May

Jul

Sep

Nov

Jan

Mar

May

Jul

Sep



LOBO

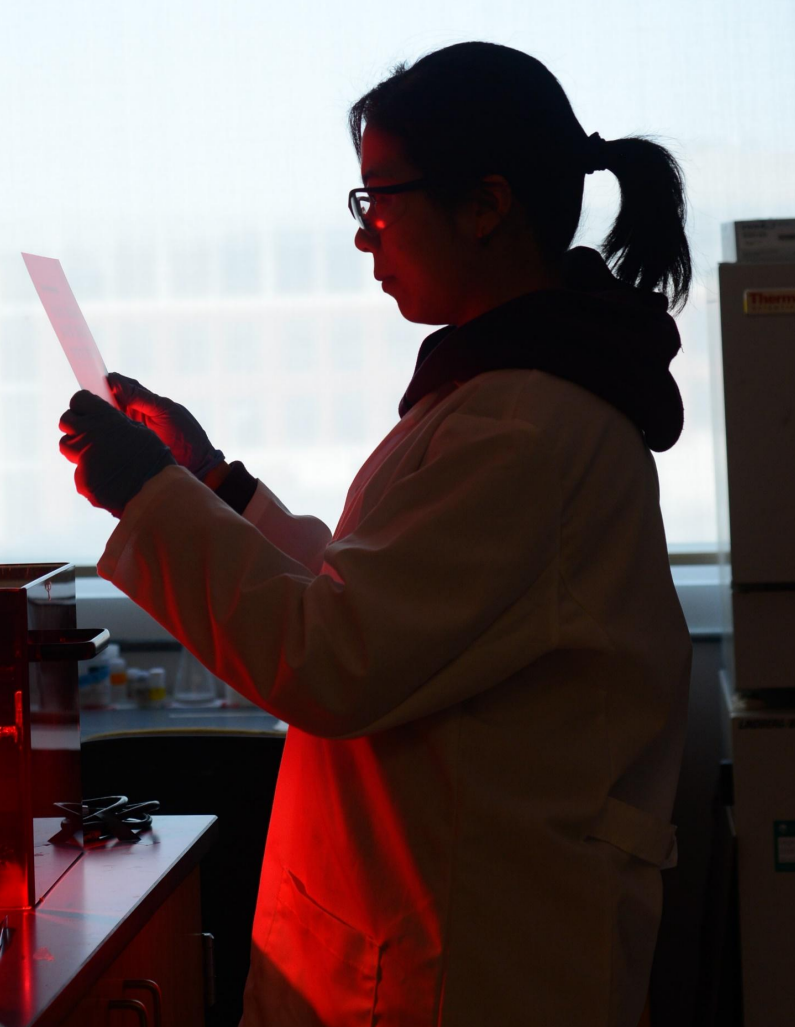
Go-Live

September 30



Prospect Research's Role in the Gift Cycle

A silhouette of a person is shown in profile, working on a laptop. The person is positioned in the lower half of the frame, with their head and shoulders visible. The background consists of a window with a grid pattern, where the light from the window creates a strong contrast with the dark silhouette. The overall scene suggests a professional or academic setting.



PROCESS OVERVIEW

Prospect Research's Role in the Gift Cycle

- 1 Identification**
Determining which unqualified donors are likely prospects based on data indicators of capacity, affinity and philanthropic propensity
- 2 Referral**
Summarize findings and make recommendations of who gift officers should pursue for a major gift
- 3 Research Supported Cultivation**
Deeper research into capacity and giving behaviors in order to provide strategic, objective insights that guide initial gift conversations
- 4 Close Gift**
Secure funding through strategic relationship management and application of prospect research insights

1

IDENTIFICATION

Prospect Research is looking for data points – extrapolated from available resources and NC State historical data – that suggests major gift potential



CAPACITY INDICATORS

- Vendor Capacity Scores
- Real Estate
- Job Title
- IRA Rollover Gifts
- Securities Gifts
- DAF Grants
- SEC Insider
- Company Board
- Memberships
- External Gifts
- Wealth Events
- Family Foundation



AFFINITY INDICATORS

- NC State Giving
- Social Media Activity
- Past Development
- Officer Engagement
- Survey Responses
- Volunteerism
- WPC Engagement
- Activities
- Event Attendance
- Engagement Score
- Student Activities
- Historical Statements



PHILANTHROPIC PROPENSITY INDICATORS

- NC State Giving
- External Gifts (#)
- External Gifts (\$)
- External Orgs Supported (#)
- External Org Boards
- DAF Grants
- Family Foundation
- Historical Statements

2 REFERRAL

Suspect is referred to major or principal gift officer when Prospect Research concludes there is major gift potential, based on review of major gift indicators



Communicate Findings



Additional Research Support



Qualification Support

3

RESEARCH SUPPORTED CULTIVATION

Once donor is qualified for major gift (development officer confirms capacity, affinity and inclination), Prospect Research can be utilized to further inform gift conversations and enable gift officer to more strategically cultivate the donor



Full Prospect Research Rating



Specific Research Area Analysis



Network Research

PROCESS IN ACTION

Practical Application of Prospect Research Driving Qualifications and Informing Gift Cultivation



1

Identification

Donor was mentioned in news article - alert reviewed by researcher. Prospect Research completed preliminary research: confirmed donor was previously unrecognized public company CEO, founder of the company, company was in process of being acquired, one NC State annual gift, some external gifts and community board service.

2

Referral

Prospect Researcher referred suspect for major gift qualification, discussed findings with philanthropy officer, who agreed to take assignment. Researcher provided updated contact information to aid outreach.

3

Research Supported Cultivation

Once gift officer secured qualification meeting, prospect researcher did additional research to better determine capacity and interests, compiling information into one page deliverable summarizing capacity (estimated \$1M - \$5M range) and philanthropic interests. Philanthropy officer developed research informed preliminary strategy and qualified donor for major gift.

4

Close Gift

Gift supporting campus mental health initiatives (research-discovered interest) was secured following additional relationship development and subsequent gift conversations.



Valuing Naming Opportunities

Determining a Naming Value: Facility

- **Measurable factors**

- Building estimated **replacement cost** or new **construction cost**
- **Square footage** of building and individual space

- **Index categories for weight**

- Established categories with multipliers of .50 to 2.00 based on
 - **Utility**: Function of individual space
 - **Name visibility**: Location, signage, traffic type/volume, virtual use
- Building categories based on **age and condition**

- **Other considerations**

- **Nameable** factors (should it be named)
- **Prospect pool**

Facility Worksheet: Baseline Calculations

Space	Assignable Square Footage	Utility Index	Visibility Index	1/2 Building Cost per Square Foot	Initial Calculated Value	Built 1974, renovated 2018 Bldg Status 7 = -25%	Adjusted Baseline
Research Lab	1,879	1.00	1.00	\$95.52	\$179,474	\$134,606	\$125,000
Lecture Hall	1,731	1.25	1.00	\$95.52	\$206,672	\$155,004	\$150,000
Classroom	967	1.00	1.00	\$95.52	\$92,364	\$69,273	\$75,000
Meeting Room	465	1.25	1.00	\$95.52	\$55,519	\$41,639	\$50,000

Determining a Naming Value: Program

Goal: Gift amount yielding a significant annual impact on the program budget

- **Measurable factors**
 - Annual program budget
 - Endowment spending rate

- **Other considerations**
 - Annual students served & visibility of program
 - Future budget/program growth
 - University/community impact
 - Prospect pool

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Thank You

