

NC STATE UNIVERSITY

NC State University Board of Trustees

University Advancement and External Affairs
Committee Meeting

November 21, 2024

Dorothy and Roy Park Alumni Center

2450 Alumni Drive

Raleigh, 27607

Derick Close, Committee Chair

Members: Marie Arcuri, Erik Dixon, David Herring, David Powers, Perry Safran

NC STATE UNIVERSITY

November 21, 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
Derick Close, Chair

2. Executive Summary

3. Roll Call
Gwen McKeever, Board Professional

4. Consent Agenda
Derick Close, Chair

A. September 5, 2024 Open and Closed Session Meeting Minutes

Action Item for Committee

B. Naming Opportunities Proposals

Action Item for Committee and Full Board

5. 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

C. University Development Update
Jim Broschart, Associate Vice Chancellor, University Development

6. Executive Summary - Closed Session

7. Closed Session

8. Reconvene in Open Session

9. Committee Discussion
Derick Close, Chair

10. Adjourn
Derick Close, 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
November 21, 2024

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

Presenter: *Derick Close, Chair via Consent Agenda*

Summary: The open and closed session meeting minutes from the September 5, 2024 meeting are presented.

Action: Committee Approval

Agenda Item: Naming Opportunities Proposals Page 10

Presenter: *Derick Close, Chair via Consent Agenda*

Summary: Chancellor Woodson has endorsed and favorably recommends to the Committee and Full Board five naming opportunities proposals: one for the College of Veterinary Medicine, two for NC State Athletics and the Wolfpack Club, one for NC State University Libraries, and one for the Wilson College of Textiles.

Action: Committee Approval and Full Board Approval

Open Session Minutes

University Advancement and External Relations Committee

Board of Trustees
North Carolina State University

September 5, 2024

The University Advancement and External Relations Committee of the Board of Trustees of North Carolina State University met on September 5, 2024

Members Present: Perry Safran, Acting Chair
Marie Arcuri
Erik Dixon
David Herring
David Powers

Absent: Derick Close, Chair

Acting Chair Perry Safran called the meeting to order at 10:00 am

Acting Chair Safran 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. No media representatives were 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.

Vice Chancellor Brian Sischo reviewed the University Advancement and External Affairs Committee Responsibilities and Plan of Work.

Consent Agenda

Trustee Arcuri made the motion, seconded by Trustee Herring, to approve the consent agenda, which included the open and closed session minutes from the April 25, 2024 meeting, as well as the naming opportunities proposals for the College of Agriculture and Life Sciences, College of Veterinary Medicine, and the Office of the Executive Vice Chancellor and Provost. The motion passed.

Committee Discussion

Trustee Herring made the motion, seconded by Trustee Arcuri to approve the revisions to Policy 03.00.02 Criteria and Procedures for Naming Facilities, Programs and Funds to allow for donor-funded naming or honorific naming of certain positions at NC State. The motion passed.

Informational Reports

Vice Chancellor Brian Sischo reviewed University Advancement's key accomplishments for the 2024 fiscal year, which included the second-highest fundraising total of \$241 million, continued growth in endowment funds to benefit students and faculty; a record of nearly 22,000 gifts and \$46M raised during the sixth annual Day of Giving; expansion of the awareness and recognition of NC State's elevating brand; implementation of a new, expansive CRM; enhancement of engagement of all alumni; and another year of exceptional event experiences for our alumni, donors and friends.

Vice Chancellor Julie Smith provided a high level outline of each of the various divisions within the External Affairs, Partnerships, and Economic Development unit as well as a legislative update which summarized the biennial legislative session. Smith highlighted significant budget accomplishments resulting in over \$600 million in state funding to the university, specifically emphasizing the transformational impacts to the physical campus. She also discussed non-capital items as well as overarching UNC System initiatives that NC State helped bring to fruition.

Lisa Marie Ferrell, our Chief Communications and Marketing Officer, emphasized that the University Communications and Marketing (UCOMM) team plays a key role in developing the university's marketing strategies, public relations and campus-wide communication efforts. Their work aims to enhance NC State's brand, manage its media presence and effectively communicate with both internal and external audiences. FY24 results have uniquely positioned the UCOMM team for continued growth and success into FY25.

Closed Session

With no further business in open session, Trustee Arcuri made the motion, seconded by Trustee Powers, at 11:08 am to go into closed session. The motion carried.

Reconvene in Open Session

After coming out of closed session, Acting Chair Safran announced the meeting in open session at 11:20 am.

Adjournment

With no further business, Acting Chair Safran announced the meeting adjourned at 11:20 am

Submitted by Gwen McKeever, Secretary

Approved by:

Derick Close, Chair

Board of Trustees Consent Agenda University Advancement Committee Proposed Naming Opportunities

November 22, 2024 BoT

Background

As per *POL 03.00.02 – Criteria and Procedures for Naming Facilities, Programs, Positions 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:** 5
- **Total Facility Proposals:** 5
- **Total Program Proposals:** 0
- **Total Non-Faculty Position Proposals:** 0
- **Total Naming Opportunities:** 26
- **Total Gift Amount:** \$6,600,000
- **Colleges/Units Represented:**
 - College of Veterinary Medicine
 - NC State Athletics and the Wolfpack Club
 - NC State University Libraries
 - Wilson College of Textiles

College of Veterinary Medicine

1. **Bereavement Room (Room 2200), Terry Companion Animal Veterinary Medical Clinic**

The Randall B. Terry, Jr. Companion Veterinary Medical Center was completed in 2011. It is the leading veterinary referral hospital in North Carolina. The Bereavement Room is adjacent to the Internal Medicine-Emergency Reception Area.

- **Naming Type:** Facility
- **Total Proposed Naming Opportunities:** 1
- **Total Gift Amount of Proposed Naming Opportunity:** \$50,000
- **Purpose of Funds:** Gifts will be directed into a current-use fund to provide discretionary funds for use by the Dean of the College of Veterinary Medicine.

Continued on the following page

Board of Trustees Consent Agenda University Advancement Committee Proposed Naming Opportunities

NC State Athletics and the Wolfpack Club

2. Golf Teams Short Game Facility, Lonnie Poole Golf Course

In addition to its public facilities, the Lonnie Poole Golf Course is home to NC State's golf teams, turfgrass and stormwater research, and the professional golf management program. Improvements to the golf teams' short game facility are underway.

- **Naming Type:** Facility
- **Total Proposed Naming Opportunities:** 1
- **Total Gift Amount of Proposed Naming Opportunity:** \$600,000
- **Purpose of Funds:** Gifts will be directed into an existing restricted fund to support NC State Golf facility enhancements and needs outside of the program's annual operating budget.

3. Gymnastics Locker Room (Room G05C), Reynolds Coliseum

The 2024 ACC conference champion women's gymnastics team is based in Reynolds Coliseum. Renovations to the team locker room will be completed by October 2024.

- **Naming Type:** Facility
- **Total Proposed Naming Opportunities:** 1
- **Total Gift Amount of Proposed Naming Opportunity:** \$125,000
- **Purpose of Funds:** Gifts will be directed into an existing restricted fund to support NC State Gymnastics facility enhancements and needs outside of the program's annual operating budget.

NC State University Libraries

4. Esports Arena, Mann Hall

The significant renovation of Mann Hall's first floor will create spaces for NC State Esports, the cutting-edge program that will leverage state-of-the-art technology, new facilities and the growing influence of the gaming industry.

- **Naming Type:** Renovated spaces
- **Total Naming Opportunities:** 15
- **Total Gift Amount of Naming Opportunities:** \$3,400,000
- **Purpose of Funds:** Gifts will be directed into a restricted fund to support the Esports facilities and infrastructure. This is intended to support all Esports infrastructure at the university, including, but not limited to, the Gaming and Esports Lab and Esports Arena.

Continued on the following page

Board of Trustees Consent Agenda University Advancement Committee Proposed Naming Opportunities

Wilson College of Textiles

5. Flex Factory Interior Spaces, Textiles Complex

The Textiles Complex was originally constructed in 1990. A significant renovation to create the new Flex Factory workspace is scheduled for February 2025-February 2026. The naming opportunity for the Flex Factory itself was approved by BoT in February 2024. This proposal is for its interior spaces.

- **Naming Type:** Existing spaces
- **Total Naming Opportunities:** 8
- **Total Gift Amount of Naming Opportunities:** \$2,425,000
- **Purpose of Funds:** Gifts will be directed into a restricted fund to support the Flex Factory renovation.

Policy References

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



MEMORANDUM

TO: Board of Trustees
FROM: W. Randolph Woodson, Chancellor
SUBJECT: Proposed Naming Opportunities
DATE: November 1, 2024

We request board approval for the following proposed naming opportunities:

College of Veterinary Medicine

1. Bereavement Room

The College of Veterinary Medicine proposes a naming opportunity in the Terry Companion Animal Veterinary Medical Center.

NC State Athletics and the Wolfpack Club

2. Golf Teams Short Game Facility

NC State Athletics and the Wolfpack Club propose a naming opportunity at Lonnie Poole Golf Course.

3. Gymnastics Locker Room

NC State Athletics and the Wolfpack Club propose a naming opportunity in Reynolds Coliseum.

NC State University Libraries

4. Esports Arena

NC State University Libraries proposes 15 naming opportunities in Mann Hall for the NC State Esports program.

Wilson College of Textiles

5. Flex Factory Interior Spaces, Textiles Complex

The Wilson College of Textiles proposes eight Flex Factory interior naming opportunities in the Textiles Complex.



MEMORANDUM

TO: W. Randolph Woodson, Chancellor
FROM: Brian C. Sischo, Vice Chancellor, University Advancement
SUBJECT: Proposed Naming Opportunities
DATE: November 1, 2024

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University Advancement Update

Brian Sischo

Vice Chancellor
University Advancement

RED AND WHITE WEEK

2024

PRESENTED BY *Coca-Cola*

October 27–November 3



Mission

Create unforgettable, weeklong homecoming experiences for the entire Wolfpack community that nurture pride in place and reaffirm lifelong connections to NC State.

Vision

As NC State's signature tradition, Red and White Week inspires our community to engage with and celebrate the university they love — and the people who sustain it — throughout their lives.



Goals & Objectives

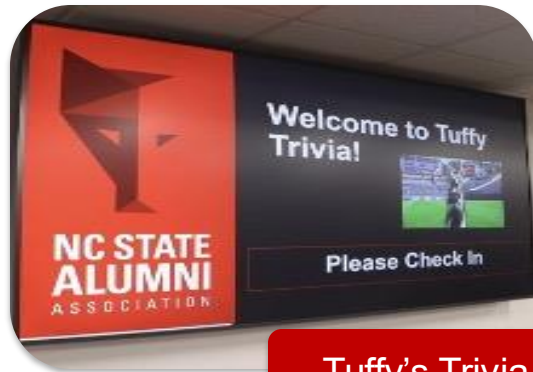
- Elevate the NC State brand and build brand awareness
- Celebrate the impact of donor support
- Encourage engagement at all levels
- Improve connectivity to the university, (all audiences).



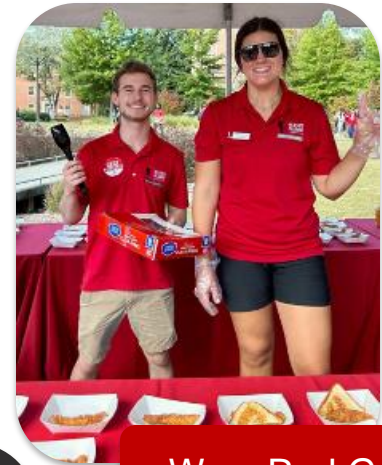


Student Alumni Association Ambassadors

Red and White Week was an extraordinary success with the Student Alumni Association engaging **3,092** individual students at 13 events.



Tuffy's Trivia



Wear Red Get Fed



Movie Night

Student Red and White Week Events

Student Giving Competition

Students raised **\$14,730.15** to support the **Extraordinary Opportunity Scholarship Initiative**.





Wolfpack Women in Philanthropy



Wolfpack Women in Philanthropy launched **Red and White Week** with a "Lessons in Leadership" panel discussion and speed mentoring event. The panel featured university leaders, including Deanna Dannels, Kathryn Meurs, Doneka Scott, and Paola Sztajn, who shared their insights on leadership and career development.

Lessons in Leadership

Alumni Red and White Week

- 730 alumni and friends
- 26 events
- 32 staff volunteers from across University Advancement assisted with student and alumni events.



Wolfpack Boards
Luncheon



Latinx Alumni Network
Reunion Weekend



Alumni Memorial Belltower
Tour

Chancellor Woodson's Fall Address





THE ORDER OF THE LONG LEAF PINE SOCIETY

THE SOCIETY



Inside NC State





Colin the Aldabra Tortoise



Dr. Greg Lewbart



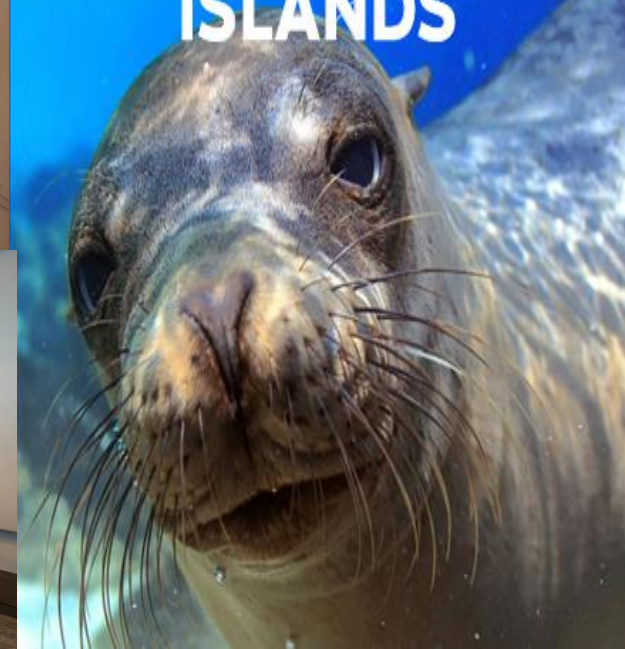
The Wonders of Wildlife Conservation in the Galapagos Islands



JUNE 21-28, 2025

with optional
Mashpi Lodge Pre-Tour and
Machu Picchu Post-Tour

THE GALAPAGOS ISLANDS



Land Grant Institutions and the Birth of **NC State**

Dr. Randy Woodson



NC STATE UNIVERSITY

NC STATE



RED AND WHITE NIGHT 2024

A Celebration of Transformation



NC STATE

CELEBRATING TRANSFORMATION

Woodson Hall

The newly named home of integrative sciences will provide vital space for STEM teaching and research at NC State and serve as a catalyst for advancing the sciences. This building is our highest-priority capital project and will connect existing centers of excellence on campus and transform the Brickyard into a hub of scientific innovation and education.



Chancellor's Transformational Endowment Fund

Unrestricted gifts have given Woodson the foundational support needed to direct resources where and when they are most needed. The Chancellor's Transformational Endowment Fund helps fuel our momentum and our ongoing transformation by ensuring future leaders have those same funds, in perpetuity.

Total Active Proposals
\$61,685,000

Total Gifts/Pledges
Approximately \$125,000,000

Other Highlighted Funds

- **Employee Dependent's Tuition Scholarship**
- **Extraordinary Opportunity Scholarship Initiative**
- **Arts NC Enhancement Fund**
- **Pack Essentials**



The Philanthropic Impact of NC State Board Members

Council of Chairs

Developing Better University Ambassadors

- Share best practices in order to lead to the highest level of board function university-wide
- Embed philanthropy in the mindset and practice of boards
- Lead to more fulfilling experiences for our highest level volunteers
- Create new networks based on more informed leaders

Board Chair	Board
Ryan de Jong	Alumni Association BOD
Jen Willis	CHASS Advisory Board
Brian Dangler	CNR Foundation Board of Directors
Jennifer Heintz	College of Design Leaders Council
Carl Harris	College of Education Board
Sharon Collins Presnell	CoS Foundation Board of Directors
Mike Holmquist	DASA Board for Student Success
Dale Cousins	Friends of the Libraries Board of Directors
Johnny Barnes	NC Agricultural Foundation Board of Directors
Scott Stabler	NC State Engineering Foundation Board of Directors
Betina Terry	NC State Foundation Board, Inc
Nancy Webster	NC Textile Foundation Board of Directors
Brian Ciaverella	Poole College of Management Advisory Board
Kathe Garrison	Vet Med Foundation Board of Directors
Eddie Wetherill	Wolfpack Club Board of Directors
Gayle Lanier	Shelton Leadership Board of Advisors
Paige Harris	Wolfpack Women in Philanthropy

Industry Insights: Board Member Philanthropy



*According to a 2017 study from Blackbaud, “consistent giving by board members is **the factor** most associated with an organization’s overall fundraising success.”*

10-20%

Industry standard for total amount of campaign donated by board members.

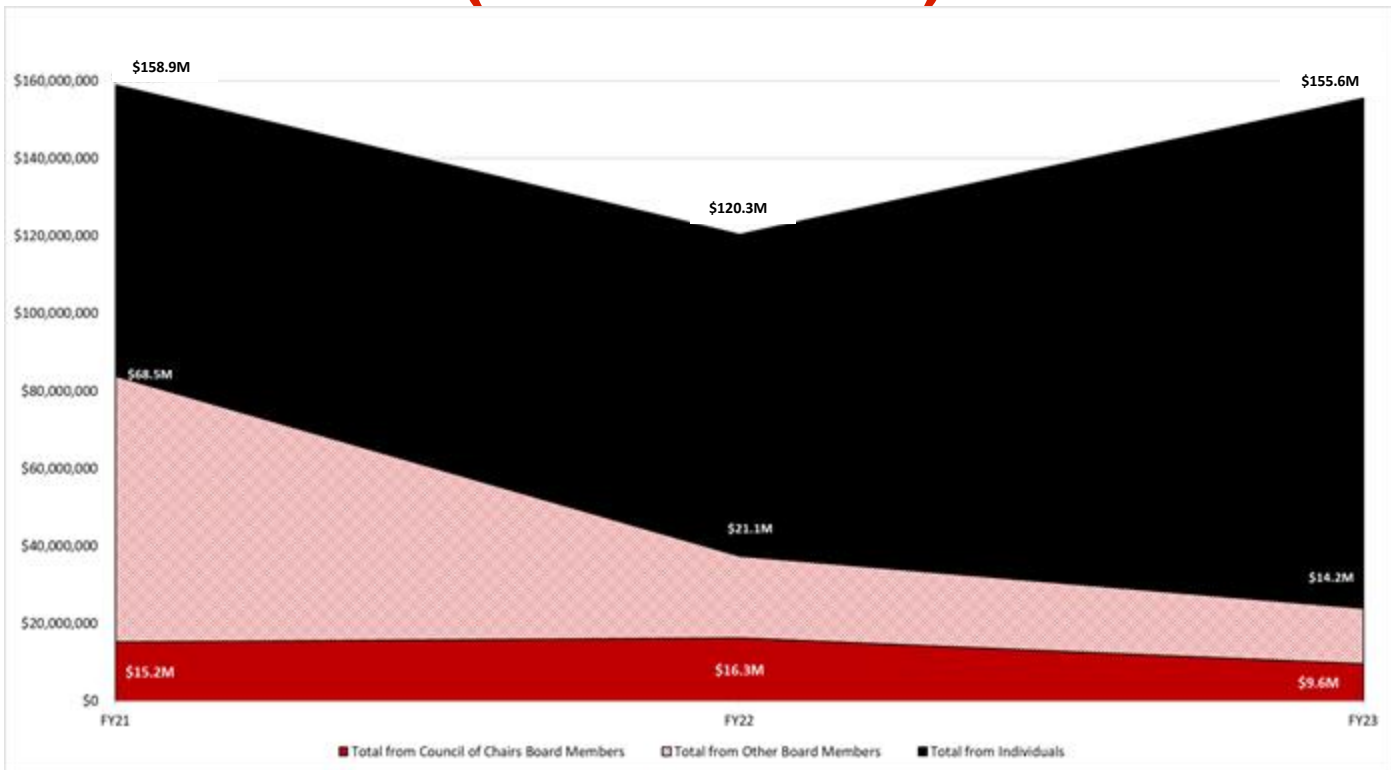
\$59.5B

Total philanthropy to Higher Education in 2023

\$20.5B (34.4%)

Total philanthropy by individuals to Higher Education in 2023

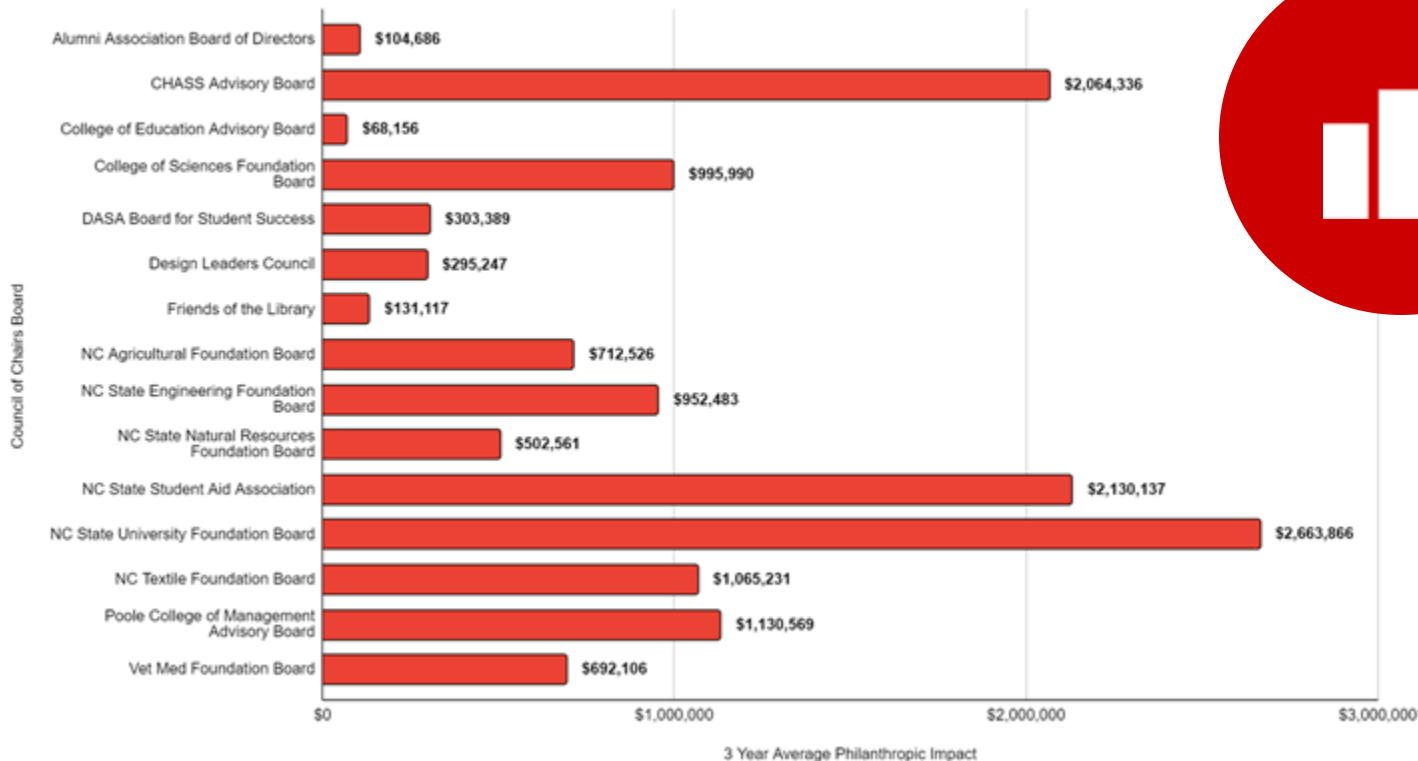
Board Member & Individual Giving at NC State (FY21 - FY23)



*On average, board members accounted for **33.4%** of all giving to NC State from individual donors the past 3 years.*

3 Year Average Philanthropic Impact by Board

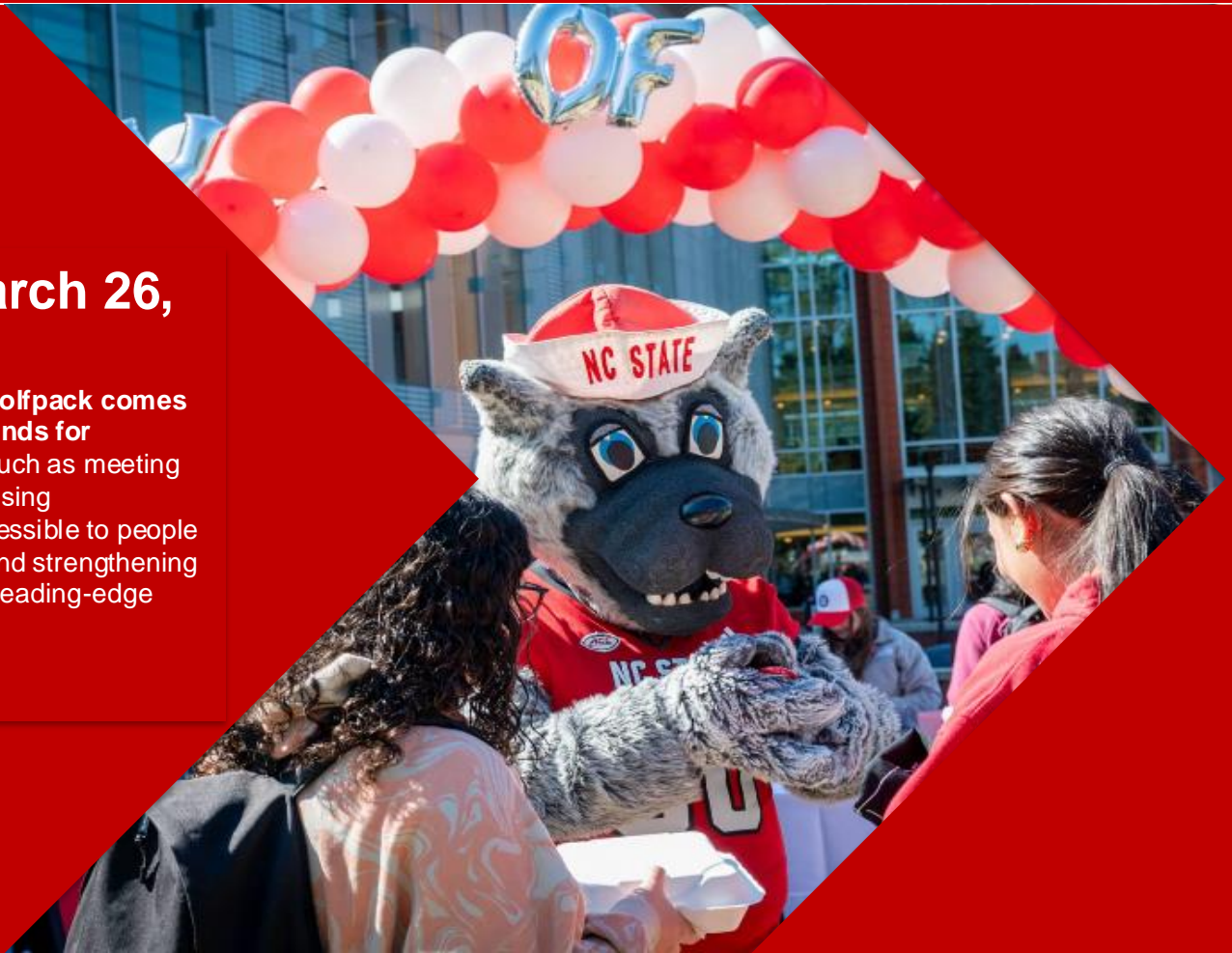
(FY21 - FY23) Council of Chairs: 3 Year Average Philanthropic Impact



Day of Giving: March 26, 2025

Every year on Day of Giving, the **Wolfpack** comes together to help NC State raise funds for **priorities across the university**, such as meeting students' most urgent needs, increasing scholarships to keep education accessible to people from every financial background, and strengthening the infrastructure that supports our leading-edge research.

#Givingpack





Most gifts received in NC State Day of Giving history 21,920



Tattoo

Questions?





External Affairs, Partnerships and Economic Development

Julie Smith
Vice Chancellor

2024 General Election Recap

- Of the 7.8 million registered voters in North Carolina, 5,675,346 people (73%) voted in this election.
- High-Level Takeaways:
 - Donald Trump won North Carolina, the first swing state called for the former president.
 - Josh Stein won the Governor's race with Democrats and Republicans splitting the Council of State races 5 to 5.
 - North Carolina Republicans picked up three US House congressional seats – now a 10-4 split as opposed to the previous 7-7 split.

****All results are unofficial until certified.****

2024 General Election Recap

- The North Carolina Senate expanded its supermajority with Republicans winning 31 of 50 seats.
- The North Carolina House of Representatives fell short of their supermajority by one seat with Republicans winning 71 of 120 seats.

In order to have a supermajority, each chamber needs a three-fifths majority. For the Senate, 30 seats are necessary. For the House, 72 seats are necessary.

<u>2025-2026</u>	Total	Democrat	Republican
<u>House</u>	120	49	71
<u>Senate</u>	50	19	31

****All results are unofficial until certified.****



2024 NC General Assembly Short Session

Senate Joint Resolution 916, Adjournment Resolution

Adjourned Friday, June 28, 2024

- July 10, 2024
- July 29 - August 1, 2024
- September 9 - 11, 2024
- October 9, 2024
- October 24, 2024
- November 19 - 22, 2024
- December 11 - 13, 2024 (sine die)

UNC System Budget Request for Remainder of 2024

- Performance-Weighted Enrollment Change
- Building Reserves

The House and Senate included both in their respective budget bills:

- House: House Bill 263, 2024 Appropriations Act
- Senate: House Bill 317, Adjustments to the 2023 Appropriations Act

Operating Budget Priorities	Conference Report Ask
Performance-Weighted Enrollment Change	\$574,578 R
	—
	\$13,068,267 NR
Building Reserves	\$4,952,988 NR
	\$2,786,673 R
	\$470,404 NR

2025 NC General Assembly Long Session

- Request from UNC System for Operating Budget Priorities – August 23, 2024
- Legislative Priorities Submission – October 18, 2024
 - Funding for Continued Engineering Expansion in Response to “Engineering North Carolina’s Future” Initiative
 - Poe Hall Operating Impacts
 - Enrollment Funding
 - Impacts of Inflation on Campus Operations
- UNC Board of Governors Approval of Legislative Agenda – February 27, 2025



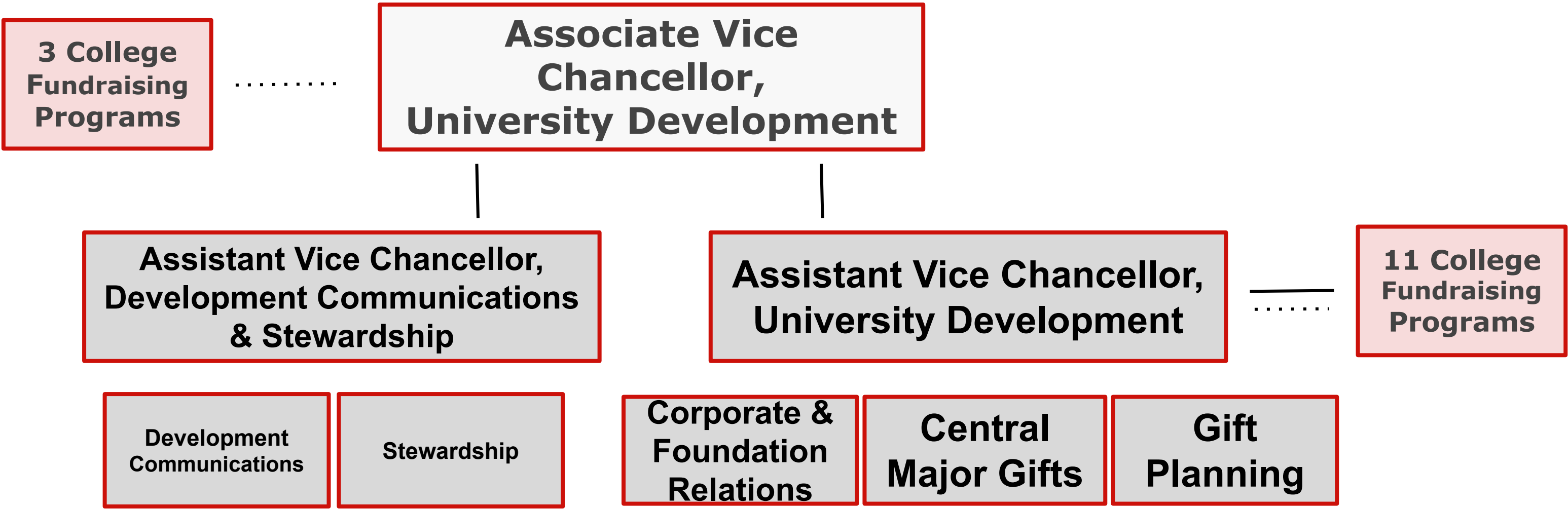
Questions?

University Development Overview

Board of Trustees Advancement & External Affairs Committee

November 21, 2024

Jim Broschart
Associate Vice Chancellor,
University Development



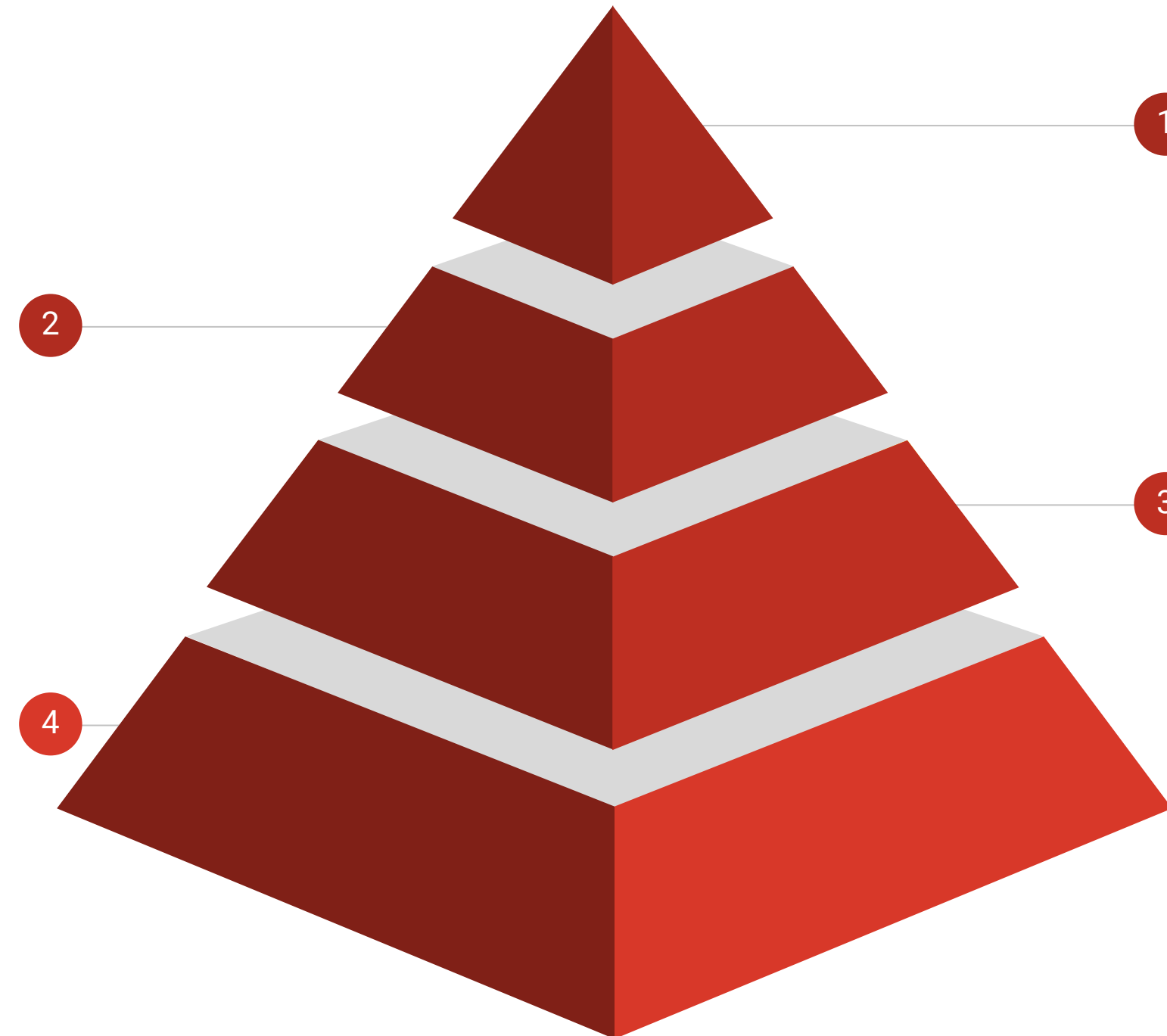
“Central” Development Functions

University-Wide Leadership, Coordination & Communication

Special fundraising projects
leadership, campaign & initiative
management, analysis, pipeline
awareness, conveners, fundraising
program improvement, recognition &
celebration, growth agenda

Geographic Coverage/Neutral Brokers, 100% Focused on Philanthropy

Our major gift officers work with
donors in every corner of the country;
doing so without ties to a college or
unit, responding to donor passions in
partnership with campus entities.



1

Lead, Support, and Partner

With colleges and units to **maximize fundraising outcomes** and **increase fundraising capacity**.

Specialized Expertise

To enable the work of all colleges
and units: **Philanthropic
Communications, Stewardship, Gift
Planning, and Corporate &
Foundation Relations**.

2

3

4

Working With Colleges and Units

Lead. Support. Partner.



UA-College Cost Sharing: \$3M+ recurring annual investment by UA into colleges to increase fundraising capacity, resulting in 28 new frontline fundraising positions.

- 25% UA - 75% College shares for major gift fundraisers. Colleges reinvest savings into new frontline fundraiser positions, with UA sharing 25%.
- College-based.
- Shared recruitment & selection.
- Collaboration on performance management and assessment.
- Commitment to university gift officer standards.
- Collaborate on professional development.
- Convene annually to review partnership and identify improvements.



Key Hire: Welcome Lauren Wilcox, Assistant Vice Chancellor for University Development



- Lead 11 college and unit programs.
- Lead Central Units: Central Major Gifts, Planned Giving, & Corporate & Foundation Relations.
 - Metrics, goal-setting, and performance measurement.
 - Celebration and recognition.
 - Fundraising practice improvement.

NC State must increase giving from individuals by 77% to achieve success in a \$3B-\$3.5B campaign.

- Sarah West & Associates (Fundraising Counsel) gap analysis. 2019.

Moving the Needle: Elevate Everything!



Planning the Elevation of the Major Gift Level to \$100K

Gifts from \$50K - \$99K



- **NC State's 3 Year Average:** \$12.94M from 158.7 proposals
- **Public Land Grant Average:** \$6.65M from 68.8 proposals
- **Aspirant Public Peers 3 Year Average:** \$8.6M from 86 proposals

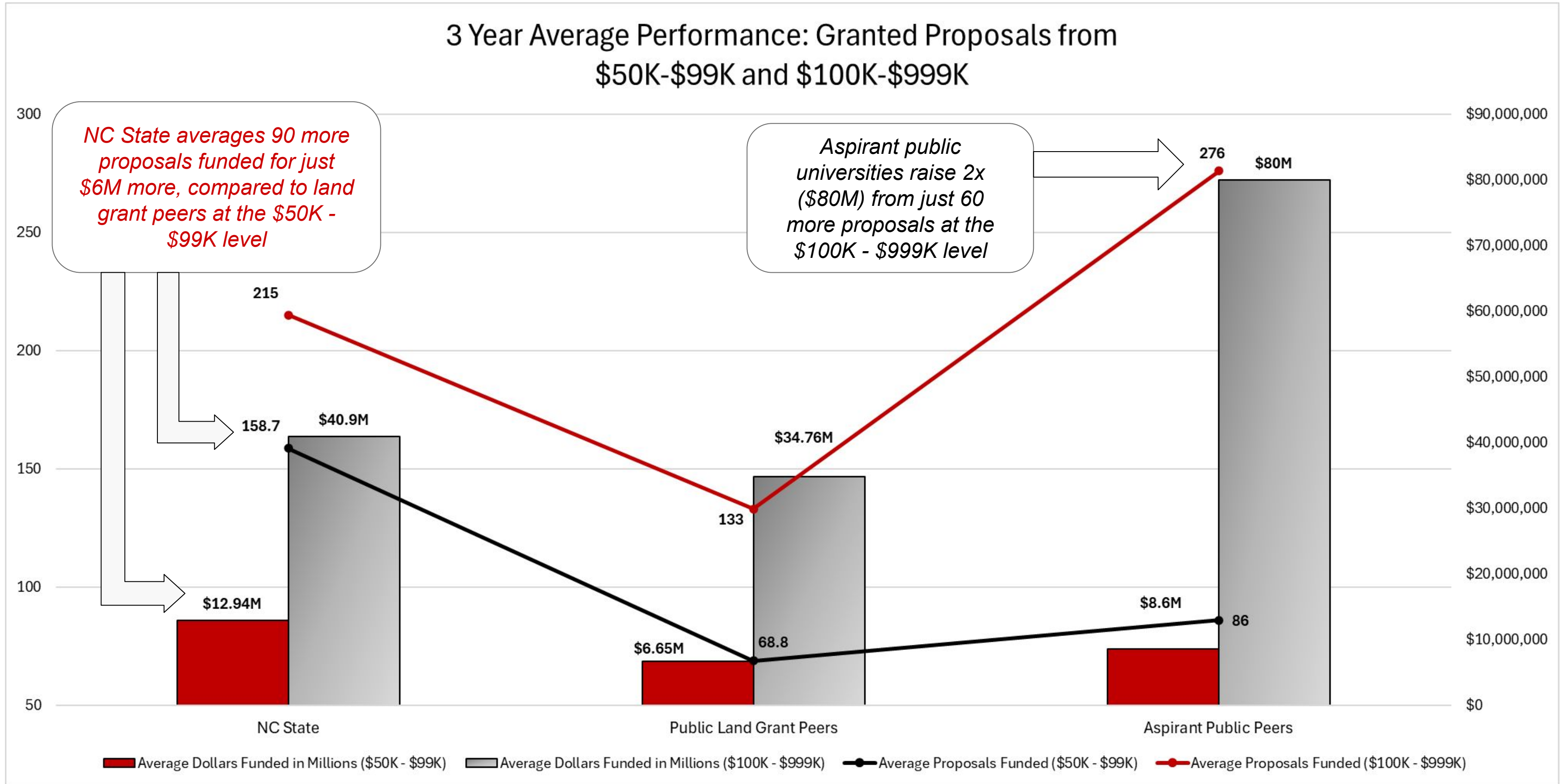
Gifts from \$100K - \$999K



- **NC State's 3 Year Average:** \$40.96M from 215.7 proposals
- **Public Land Grant Average:** \$34.76M from 133 proposals
- **Aspirant Public Peers 3 Year Average:** \$80M from 276 proposals

Moving the Major Gift Level to \$100K

3 Year Average Performance: Granted Proposals from \$50K-\$99K and \$100K-\$999K



Building a Leadership Giving Program (\$1M - \$4.9M)



NC State has received **372 gifts** all-time from \$1M to \$4.9M, with 54% of those being bequest intentions



7 households (all-time) have made a **cash** gift/commitment of \$2.5M to \$4.9M to NC State.

→ **101 households** have made a single cash gift/commitment from \$500K - \$4.9M



NC State fundraisers currently manage **771 households** with lifetime giving or a wealth rating at \$500K - \$4.9M (25.2% have lifetime giving under \$10K)



Potential exists – an additional **748 households*** have a wealth rating of \$1M - \$4.9M but are not currently managed by an NC State fundraiser and show traits **of a potential prospect**

Individual Giving Task Force

NC State must increase giving from individuals by 77% to achieve success in a \$3B-\$3.5B campaign.

Focused on Campaign Readiness and Program Improvement:

Evaluation and rollout of changes to major gift and minimum endowment levels.

Emphasizing “gifts of today” versus estate gifts.

Raising donor sights & maximizing gift impact.

Gift packaging opportunities.

Elevating expectations | Goal-setting changes (Scorecard).

Early pipeline.

