

Plan 2016

The Strategic Plan of University Advancement

NC State University

Introduction

Higher education across the country is under enormous pressure to change. This pressure is especially acute for public universities in North Carolina, where public investment in higher education is declining, and there is a commitment to keeping a college education affordable and accessible through state-mandated low tuition. NC State, in its strategic plan, “Pathways to the Future”, identifies a number of areas where the university must improve, including higher graduation rates for its undergraduate students, more tenured and tenure track faculty, increased levels of interdisciplinary research focused on society’s grand challenges, and strengthened local and global partnerships that allow the university to increase and expand its impact. To accomplish these goals, the university seeks to increase and diversify its revenue streams, with particular focus on research and private gifts. It also seeks to enhance its reputation and engage a larger number of alumni and friends of the university as well as industry partners and funding agencies.

University Advancement is uniquely positioned to play a leadership role in the achievement of the university’s strategic goals. The division has the staff and expertise that can lead the efforts to increase private gift revenue and enhance the visibility and reputation of the university, engaging increasingly larger numbers of alumni, friends and other partners in the process. To maximize its effectiveness, University Advancement has completed a strategic planning process, designed to propel the division and focus its efforts over the next three years.

Through an inclusive planning process, the leadership of the division has identified five broad areas where it will concentrate its efforts during this period: pre-public phase of the campaign, integrated marketing communications, engagement of alumni and friends, data quality, and staff diversity.

Through effective, collaborative planning and implementation, efforts across these 5 key areas will overlap to ensure maximum efficiency and impact. For example, the completion of a successful pre-public phase of the campaign will require that communications efforts and alumni engagement activities be coordinated and consistent with efforts by fundraisers.

Goals and Targets

Complete the Pre-Public Phase of the Campaign

Over the next three years, NC State seeks to raise \$900 million in gifts and new commitments. Towards this goal, the university has already raised approximately \$180+ million in grandfathered gifts, leaving \$720 million more to be raised in fiscal years 2014, 2015 and 2016. This is an aggressive yet achievable goal, requiring everyone in the division and across the university to focus their efforts on developing an atmosphere for, and ensuring, successful major gift fund raising.

Increase the productivity of existing major gift fund raisers

NC State's development program must significantly increase its major gift fund raising productivity. A recent study determined that, on average, fund raisers at NC State only spend 40 percent of their time devoted to major gift fund raising. By FY '15, to reach our ambitious campaign goals, fund raisers must increase that percentage to 75 percent. All efforts must be made to reduce the amount of time that fund raisers spend on administrative duties including foundation management, special events, annual giving, and other activities that distract them from the strategic, front-line efforts that lead to fundraising success. In particular, NC State fund raisers must dedicate more time to the road work necessary to increase the size and number of major gifts raised in support of the fund raising priorities of the university.

University Advancement will take several proactive measures to assist fundraisers meet these expectations. By FY'15, new analytics tools will be implemented, helping gift officers to focus more strategically on likely major gift prospects. Other key resources to support more effective front-line fundraising, including a development officer's tool kit will be made available on an intranet web site. By the end of FY '15, University Advancement will also fully implement a dashboard reporting tool to assist fund raisers and their managers in assessing the effectiveness of fund raising efforts.

In addition to closing leadership gifts during the pre-public phase of the campaign, fund raisers will be trained and coached on the discovery process, with the goal of doubling the number of discovery calls in FY'14 as compared to FY'13. This targeted effort on discovery calls should help identify the donors to the public phase of the campaign, increase the percentage of alumni who give to the university, and help the fund raisers reach best practice levels of visit activity to 12-15 per month. From FY'13 to FY'14, our goal is to provide all fundraisers with the training and basic resources they need to complete 12-15 calls per month.

Finally, for the university's most capable donors and potential donors, the university will set a goal of connecting with each one at least seven times per year, starting in FY'15.

Increase gift revenue

NC State is experiencing a period of rapid growth in its gifts and new commitments fund raising totals. In FY'13, NC State will raise \$190-200 million. This accelerated growth is a result of several large eight figure gifts. To achieve its goals, it will be important that the university continue to close 3-4 eight figure gifts per year, and to significantly increase the number and size of major gifts. It is also important that each unit sets increasingly aggressive fund raising goals and implements a strategy to achieve those goals. It will also be important that the university accomplishes its gift revenue goals, so that the full potential of its campaign is realized. Over the next nine years, starting in FY'13, gift revenue will need to grow to \$200 million annually by 2021, and be sustained at or above that level in future years. University Advancement commits to growing gift revenue from \$115 million in FY'13 to \$125 million in FY'14. Given the Chancellor's goal to grow the endowment to \$1 billion by 2019, at least \$40 million of the gifts receipts must be designated for endowment.

A new initiative, conceived in FY'13 that will be developed into a full-fledged program during the campaign is a major gifts program for parents of current students. In a recent article in the *Triangle Business Journal*, NC State was fourth among all UNC system schools in private gift revenue, trailing UNC-Chapel Hill, Appalachian State and UNC-Wilmington. NC State must develop goals for gifts and new commitments and gift revenue from this important constituency, challenging UNC-Chapel Hill in this category. To do this, NC State will implement a parents' council, and secure commitments from colleagues in Enrollment Management and the Division of Academic and Student Affairs to make the changes necessary to implement a best practices program.

Grow the percentage of undergraduate alumni giving

The Chancellor has publicly stated that NC State aspires to be a Top 25 public university. Although no time-table has been established to achieve this goal, nor has any one rating been established as the benchmark, increasing the percentage of alumni who give to the university will be vitally important in making progress towards this lofty goal. Although the university will continue to seek to grow discretionary funding for its programs, the emphasis will shift over the next three years, placing focused efforts on donor acquisition and retention. The introduction of new fund raising techniques, including crowd sourcing, should be explored. Our goal, led by the efforts of Annual Giving and the Wolfpack Club will be to grow the undergraduate alumni percent participation from 13.5 percent in FY'12 to 14.5 percent in FY'15. This goal is

aggressive, considering the large number of new graduates that the university produces each year.

Campaign planning

Fund Raising Priorities – To maximize the results of NC State’s campaign, the fund raising priorities must be closely aligned with the university’s strategic plan. Efforts are underway to identify the university-wide “big ideas” that will propel the university and compel its donors to make significant investments. In the coming months the university must complete the planning process, including forecasting the fund raising sources and uses that roughly equate to \$1.5 billion. By August 31, 2013, the deans will submit their campaign priorities to ensure that the fund raising goals are realistic and aligned with the university’s strategic plan.

Volunteers – Key to the success of the pre-public phase of the campaign will be the recruitment of volunteers who have shown through their philanthropy, time commitment, and the power of their social networks to be able to open doors and invite others to make significant financial gifts and pledges during the early phase of the campaign. By July 15, 2013, we will recruit an honorary chair and three campaign co-chairs. By December 31, 2013, with the assistance of the volunteer campaign leadership, the university will recruit a campaign steering committee of 10-12 additional volunteers. The colleges and units will be encouraged to recruit their pre-public campaign volunteers, and a summit of volunteers will be held in spring 2014.

Communications – By December 31, 2013, NC State will develop a campaign communications toolbox to be used by campaign volunteers, fund raisers, and academic leadership to deliver a consistent and compelling message for giving to NC State. Among other assets, the toolbox will include points of pride, speaking points, fact sheets and templates for the campaign. A campaign tag line will also be developed and tested with campaign leadership. Discussions with the staff of *NC State* will explore how news about the campaign will be incorporated into the Alumni Association’s magazine.

Training – The internal readiness survey conducted by Bentz Whaley Flessner identified a need for campaign training throughout the university. Advancement Resources followed the readiness survey with a needs assessment for training and has recommended a number of programs designed to give the fund raisers and academic leadership the tools and confidence to successfully raise major gifts on behalf of the university. Training is expensive, and given the budget issues facing the university, including University Advancement, it may be necessary to conduct some of the training using current University Advancement staff. A formal training program needs to be implemented starting in fall 2013.

Raise the Visibility of NC State through Enhanced Integrated Marketing Communications

Complete the brand refresh and launch a new brand platform

The highly decentralized culture of NC State has produced significant brand confusion both to internal constituents and in the external marketplace. Absent a strong central marketing communications program, over time the colleges and units developed their own messaging and images. It's clear that a new approach to communications at NC State is necessary for the university's implementation of its strategic plan. In FY'14, University Communications will conclude the brand market study, and lead the campus-wide implementation of a renewed and powerful brand platform through an interactive process that ensures buy-in from key stakeholders. Taking this new brand platform, University Communications will assist its partners in the Alumni Association and across the division (as well as across campus) in refreshing brand presentation and communications efforts.

Also in FY'14, University Communications will work with Executive Officers to implement necessary and effective policy to ensure brand effectiveness.

In FY'15, University Communications will lead efforts to formalize a collaborative organizational communications systems across campus that will effectively ensure brand cohesion and consistency at NC State.

Special events

NC State hosts hundreds of events each year, from small department lectures to major university wide signature events. In some cases, the goals and objectives for events are ill-defined, and the messaging is unclear. In addition, the standards that the university has established for quality and protocol are not followed closely enough.

In the coming year, a newly established Events Steering Committee chaired by Advancement staff and including key players across campus will review current NC State practices and national best practices, and create a series of improved expectations, requirements and standards for university events. The committee will also examine the need for any new policies that might need to be created to ensure university events are well planned and executed based on clear goals that will help achieve the university's strategic plan.

In FY'14, as part of these efforts, Special Events will strive to increase by 30 percent the number of events held across campus that utilize the university standards. In addition, a software solution to event registration that can be implemented university wide for alumni and friends special events.

Paid advertising

In FY'14, a "next level" plan will be implemented to improve the placements and impact of paid advertising, both digital and print, among targeted audiences. The improved media mix will be based on data-driven decision built on market research and metrics.

Additionally, a process will be established in FY'14 to provide central advertising coordination and support allowing campus partners to utilize University Communications' media buying connections, placements and discounts. This effort will also help ensure on-brand advertising form groups across campus.

Earned media

IN FY'14, an improved media relations plan will be implemented to reinforce the promotion of stories that reinforce the university's new brand platform and continue to support NC State's strategic plan. Similar to advertising efforts, the media plan will better utilize data and measurement tools to set and measure goals. In addition to ensuring increased numbers of media hits, the plan will develop targets for placements in top national media outlets and thought-leader publications, important for raising positive awareness for NC State as the university is heading into the campaign.

In FY'15, as part of its efforts to formalize a collaborative organizational communications system across campus, a structure will be implemented to ensure the quality, consistency and collaboration of all campus media releases.

Web and digital communications

As Web/digital communications become increasingly important for universities, University Communications will implement a structure and strategy in FY'14 that provides its web team to have more involvement and influence across the department and division. The plan will be focused on advancing the core brand through strategic online channels and building the foundation for successful brand extensions and sub brands at NC State. Inherent in this strategy is creating the bandwidth to provide support to division and campus partners as the new brand is rolled out.

Content strategy

Through the channels described above as well as the broader scope of central communications efforts at NC State – including internal communications, print, design and interactive – University Communications will enhance its multi-channel content strategy in FY'14 to promote the brand and support the university's strategic plan. Through the brand refresh rollout and

implementation process in FY'14-15, systems will be developed and implemented to ensure the broader Advancement division and larger university implements a brand-centric communications strategy.

Increase Student and Alumni Engagement

Membership in the NC State Alumni Association

Research shows that students that are engaged in the Alumni Association during their time on campus are much more likely to be engaged in the university after graduation. And we know that alumni who join the Association are much more likely to make annual gifts to the university. With aggressive campaign and annual giving goals, it is very important that the Alumni Association and the rest of University Advancement make the engagement of a larger number of students and alumni a high priority. In FY'14, increase student membership from 1,800 to 2,700, and overall membership in the Alumni Association from 23,000 to 25,000. Increase the number of people who attend events hosted by the Alumni Association by 2,000 without a significant increase in the number of events. Continue support the Alumni Association's leadership in institutionalizing Homecoming, per the goals of the university's strategic plan.

Enhance the quality of regional volunteer leadership

One of the most effective ways of engaging alumni in the university's strategic plan is to deliver programming aligned with the plan in regions with the largest populations of NC State alumni. Currently, the quality of volunteer leadership in the regions varies tremendously. In the Tier 1 regions, four are weaker than the others, making it difficult to plan effective, well-attended events. Those regions include Atlanta, Asheville, Richmond, and Winston-Salem. In FY'14, recruit and train new leadership for these four regions.

Alumni Association web-site

With the increasing popularity of mobile phones to access the web, make the Alumni Association web-site mobile friendly in FY'14.

Data Quality and Quantity

With the conversion to Advance Web successfully completed, the focus has shifted to the acquisition of new data, and the clean-up of existing data, to assist all units in their outreach

activities. By FY'15, significantly increase data in Advance, including event attendance, relationships with others, and giving to non-NC State entities, to enhance the ROI of data mining. Included in the new data is information about the alumni and friends of the university who participate in the WolfTreks travel programs.

Enhance Diversity of University Advancement

During FY'13, much progress was made in diversifying the ranks of development personnel across the campus. But much more can be done, especially in University Communications and the Alumni Association. Over the next year, strive to fill 50 percent of new or vacant positions with individuals from underrepresented, federally recognized groups.