BOARD OF TRUSTEES
NORTH CAROLINA STATE UNIVERSITY
AGENDA

University Advancement and External Affairs Committee
1:00 p.m.-2:30 p.m., September 10, 2015
Chancellor’s Conference Room- Holladay Hall
Jimmy Clark, Chair
Members: Ann Goodnight, Ben Jenkins, Stan Kelly, Wendell Murphy, Randy Ramsey

CALL TO ORDER
Jimmy Clark, Chair of Committee

ROLL CALL
Jimmy Clark, Chair of Committee

READING OF STATE GOVERNMENT ETHICS ACT CONFLICT OF INTEREST STATEMENT
Jimmy Clark, Chair of Committee

1. RESPONSIBILITIES OF THE COMMITTEE
   TAB 6.1
   A. Review Committee Responsibilities as established in Bylaws
      University Advancement & External Affairs
      Jimmy Clark, Chair, University Advancement and External Affairs Committee
      6.1A
   B. Review Draft Agenda/Plan of Work for the Year
      University Advancement & External Relations
      Jimmy Clark, Chair, University Advancement and External Affairs Committee
      Brian Sischo, Vice Chancellor for University Advancement
      6.1B

2. APPROVAL OF MINUTES
   TAB 6.2
   Approval of April 16, 2015 Open Session Minutes
   6.2A

3. INFORMATIONAL REPORTS
   TAB 6.3
   A. University Advancement and Fundraising Update
      Brian Sischo, Vice Chancellor for University Advancement
      6.3A
   B. Alumni Association Update
      Benny Suggs, Associate Vice Chancellor for Alumni Relations and Executive Director, Alumni Association
      6.3B
4. COMMITTEE DISCUSSION

A. Social Media Strategy & Campaign Communications Update  
   Brad Bohlander, Associate Vice Chancellor for University Communications, and  
   Amy Feriozzi, Director, Development Communications and Donor Relations,  
   Advancement Services

B. Case Commons Project Overview and Facility Naming Opportunities  
   Debbie Yow, Director of Athletics, Chris Boyer, Senior Associate Director of  
   Athletics, Bobby Purcell, Executive Director, Wolfpack Club, and Phillip Wood,  
   Associate Executive Director, Wolfpack Club

5. Closed Session

   A. Approval of April 16, 2015 Closed Session Minutes*  
   B. Request approval for Naming Specific University Facilities and Programs J

RECONVENE OPEN SESSION

ADJOURN

* Committee Approval  
J  Full Board Approval
Responsibilities of the Committee

Review Committee Responsibilities

Review Draft Agenda/Plan of Work for the Year
IV. External Affairs and University Advancement Committee
Delegated Authority and Assignments

a. Development and Advancement Activities

i. Approve all university fundraising campaigns.

ii. Advise the chancellor and vice chancellor for university advancement on the formation of campaign steering committees.

iii. Advise the chancellor and vice chancellor for university advancement on the priority, timing, direction, funding and management of capital and other fundraising campaigns.

iv. Recommend to the Board of Trustees for approval the naming of all facilities and programs, owned, operated or controlled by the university.

v. Advise the chancellor in all areas pertaining to development, advancement services, university communications and alumni relations.

vi. Receive nominations for the Watauga Medals and recommend nominees for approval to the Board of Trustees.

b. External Affairs

i. Receive regular reports on University Communications activities and initiatives.

ii. Receive regular reports on NC State Alumni Association activities.

iii. Receive regular reports on the activities of the state legislature.

b. Policy Development

i. Upon the recommendation of the chancellor, recommend to the Board of Trustees for approval policies related to the relationship between the university and its affiliated foundations and the coordination of all fundraising activities intended to benefit the university.

ii. Upon the recommendation of the chancellor, recommend to the Board of Trustees for approval policies including but not limited to such matters as the conduct of fundraising campaigns, and the use and application of privately donated funds for any activity whose sponsorship may implicate or obligate the university.

iii. Upon the recommendation of the chancellor, recommend to the Board of Trustees for approval policies regarding fundraising activities intended to benefit the Endowment Fund and various affiliated foundations.

iv. Recommend naming guidelines for endowed funds, and facilities and programs funded in whole or in part by private monies.

v. Upon recommendation of the chancellor, recommend to the Board of Trustees for approval policies regarding the awarding of the Watauga Medal.
NC STATE BOARD OF TRUSTEES
UNIVERSITY ADVANCEMENT AND EXTERNAL AFFAIRS COMMITTEE
2015 – 2016 PLAN OF WORK

September
- Fund Raising Reports (NC State Pol. 01.05.01, App IV.a)
- Review Campaign Priorities (NC State Pol.01.05.01, App IV.a.iii) (Approval)
- Naming Specific University Facilities and Programs (NC State Pol. 01.05.01, App IV.a.iv) (Approval)
- University Advancement FY’15 Report
- Review Committee Responsibilities and Work Plan (Annually)

November
- Fund Raising Reports (NC State Pol. 01.05.01, App IV.a) Provide periodic updates
- Fund Raising Naming Plans (NC State Pol. 01.05.01, App IV.a.i,a.iii) (Approval)
- Alumni Engagement Update (NC State Pol.01.05.01, App IV.a.vii)
- Campaign Update (NC State Pol. 01.05.01, App IV.a.iii)
- Watauga Medal Nominations (NC State Pol.01.05.01, App IV.a.vi) (Approval)
- Naming Specific University Facilities and Programs (NC State Pol. 01.05.01, App IV.a.iv) (Approval)

February
- Fund Raising Reports (NC State Pol. 01.05.01, App IV.a) Provide periodic updates
- Fund Raising Naming Plans (NC State Pol. 01.05.01, App IV.a.i,a.iii) (Approval)
- Campaign Update (NC State Pol.01.05.01, App IV.a.iii)
- University Communications/Brand Update (NC State Pol.01.05.01, App IV.a.vii)
- Naming Specific University Facilities and Programs (NC State Pol. 01.05.01, App IV.a.iv) (Review all proposals to name facilities or programs as recommended by the Special Donor and Honorary Committees) (Approval)

April
- Fund Raising Reports (NC State Pol. 01.05.01, App IV.a) Provide periodic updates
- Fund Raising Naming Plans (NC State Pol. 01.05.01, App IV.a.i,a.iii) (Approval)
- Campaign Update (NC State Pol.01.05.01, App IV.a.iii)
- External Affairs Update (NC State Pol. 01.05.01, App IV.b.iii)
- Naming Specific University Facilities and Programs (NC State Pol. 01.05.01, App IV.a.iv) (Review all proposals to name facilities or programs as recommended by the Special Donor and Honorary Committees) (Approval)
Approval of Minutes

Approval of April 16, 2015
Open Session Minutes
The University Advancement Committee of the Board of Trustees of North Carolina State University met in Open Session at 1:00 p.m. in the Chancellor's Conference Room in Holladay Hall. In attendance were:

Members Present: Jim Owens, Chair
Gayle Lanier
Bob Mattocks
Wendell Murphy
Ron Prestage
Ramsey

Others Present: Brad Bohlander, Associate Vice Chancellor, University Communications
Kushal Dasgupta, Associate Vice Chancellor, Advancement Services
Lisa Dyer, Executive Assistant, University Advancement
Taylor Jeffreys, Assistant Vice Chancellor for Finance and Business, University Advancement
Brian Sisko, Vice Chancellor, University Advancement
Benny Suggs, Associate Vice Chancellor, Alumni Relations and Interim Associate Vice Chancellor, University Development
Shawn Troxler, Assistant General Counsel
W. Randy Woodson, Chancellor

Chair Jim Owens called the session to order and read the State of North Carolina's Government Ethics Act.

Ron Prestage made a motion to approve the April 16 minutes, seconded by Randy Ramsey, and the motion carried.

Chair Owens asked VC Sisko for a University Advancement update, and VC Sisko provided handouts of organizational updates, which included University Development and University Advancement organizational charts. He then introduced AVC for Alumni Relations, Benny Suggs, as the Interim AVC for Development, following Laurie Reinhardt-Plohnk's termination on April 3. VC Sisko shared that an expedited search was set to launch, with Associate Vice Chancellor for Finance and Administration and University Treasurer, Mary Paloquin-Dodd, chairing the search committee. VC Sisko went on to say that our hope was to have the new AVC for University Development selected during the summer and ready to hit the ground running in September.

VC Sisko also announced that Keith Oakley, Executive Director for College Advancement in the College of Agricultural and Life Sciences, would be helping during this interim period as an advisor and to step in when VC Sisko or AVC Suggs are unavailable. Further, VC Sisko shared that Bill Crouch, a consultant with Jerold Panas, Linzy & Partners, has been engaged to conduct an internal program review and assessment, and AVC Suggs has begun a similar analysis. Mr. Crouch's review will include a thorough analysis of the Annual Giving program,
whose call center is currently contracted with the firm RuffaloCODY, due to poor ROI. Mr. Crouch plans to complete his review in May and share his findings with VC Sischo.

VC Sischo then led a review of the organizational chart for his direct reports and the colleges, pointing out that dotted-line reports fall under the NCSU Foundation and that those without dotted-line reporting lines fell under their respective college’s foundation. He noted that of particular concern is the fact that there are 7 vacancies out of 19 positions in Central Development. Also, the Corporate and Foundation Relations (CFR) role has been vacant for nearly 2 years, but searches are underway to fill that position, along with vacant Executive Director of Gift Planning role.

Randy Ramsey noted we’ve had a lot of turnover and inquired as to reasons. VC Sischo noted competition, including from entities previously not a threat (such as The Boys & Girls Club, who offered one of our former development officers 50% more salary than we were able to pay.) He stated that leadership played a role as well. Chancellor Woodson noted that we’re also losing people because we’re successful, and we face restrictions placed on us by State of North Carolina restrictions which make it easier to hire externally as opposed to internally. He pointed out that it is difficult to retain talent when Board of Governors approval is required; their quarterly meeting schedule means we sometimes lose good candidates who have other offers on the table.

Ron Prestage asked about development officers’ average length of service, which VC Sischo reported to be about 3 years. Ron Prestage then asked if burnout were a factor, and VC Sischo stated burnout was less a factor than competition and poor fits.

VC Sischo then provided an update on fundraising results, sharing handouts with figures from gifts, pledges and campaign commitments. Chancellor Woodson mentioned that Governor McCrory is talking up the Engineering Oval project as a funding priority, and VC Sischo noted record-breaking results by GALS, along with outstanding results by Vet Med (including a $5M gift that closed a day ago and wasn’t included in the handouts). Corporate and foundation giving is down significantly, underscoring the need to fill the CFR position. Nevertheless, VC Sischo believes we are poised for a record fiscal year. In relation to the campaign, we are hoping to reach the $900M mark by fall and possibly hit the $1B mark by end of calendar year.

VC Sischo then commended AVC Brad Bohlander for the successful rollout of the new university brand, which culminated in the first ever “Brand Camp.” He congratulated AVC Benny Suggs on the Alumni Association’s achievement of highest social media ranking and the fact that they topped their most recent monthly membership goal by 21%. Noting our growing success with social media, Chancellor Woodson noted that we’ve received 112,000 “likes” on the university’s Facebook page.

Chair Owens then asked VC Sischo and Assistant VC Jeffreys to present on the topic of “Financing Fundraising and Advancement at NC State.” VC Sischo made a distinction between development and advancement, the latter of which includes University Communications, the Alumni Association and Advancement Services.

VC Sischo and Assistant VC Jeffreys noted that while the percentage of state appropriated monies to Central Development had dropped 9%, from 69% to 60%, the amount of our budget has increased through fundraising. They then shared which parts of our programming are state funded vs. which are not. For instance, the Alumni Association has revenue that other UA departments don’t due to merchandise sales. Due to the uncertain nature of state funding, VC Sischo stated that our long term goal should be to wean ourselves from state support of development in favor of
more vigorous fund raising. Chancellor Woodson noted that our goal is to keep the state from taking the $6M from us they're proposing to do, but reminds us that we can and need to be creative about how we spend our monies.

Chair Owens then invited VC Sischo to share a campaign communications overview. AVC Brad Bohlander gave a presentation and said that while we're playing a bit of catch up, we are in a good position. He said we must make sure we have strong themes, which we will test in the market. We will look to implement crowdfunding, social media, etc., as it no longer makes sense to print thousands of documents as opposed to creating and storing them electronically. Chair Owens asked if "Think and Do" is present in all of our communications and brand imaging, which AVC Bohlander confirmed. Chair Owens stated that he wants to be sure that we're driving the same thematic and key words universally. Bob Mattocks noted that the paradigm has shifted and now NC State is the school of choice, particularly because a job is practically a guarantee upon graduation. Continuing that theme, Ron Prestage stated that we can make the claim that NC State students can graduate and get a job, often having secured jobs prior to graduation. He also said that one of our biggest selling points is the practical application of our curriculum, high starting salaries and STEM programs.

Chair Owens made a motion to move to a Closed Session, seconded by Randy Ramsey, and the motion carried.

In Closed Session, the Committee reviewed and approved two proposals to name specific university facilities.

Returning to open session, with no further business, the meeting adjourned 2:43pm.

Respectfully submitted,

Jim Owens
Chair
Informational Reports

University Advancement and Fundraising Update

Alumni Association Update
| % | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 54.3% | 708 | 732 | 745 | 757 | 769 | 782 | 794 | 806 | 818 | 830 | 842 | 854 | 866 | 878 | 890 | 902 | 914 | 926 |
| 49.4% | 613 | 636 | 659 | 682 | 705 | 728 | 751 | 774 | 797 | 820 | 843 | 866 | 889 | 912 | 935 | 958 | 981 | 1004 |
| 23.8% | 195 | 212 | 229 | 246 | 263 | 280 | 297 | 314 | 331 | 348 | 365 | 382 | 399 | 416 | 433 | 450 | 467 | 484 |
| 22% | 183 | 200 | 217 | 234 | 251 | 268 | 285 | 302 | 319 | 336 | 353 | 370 | 387 | 404 | 421 | 438 | 455 | 472 |
| 11% | 84 | 96 | 108 | 120 | 132 | 144 | 156 | 168 | 180 | 192 | 204 | 216 | 228 | 240 | 252 | 264 | 276 | 288 |
| 61% | 396 | 424 | 452 | 480 | 508 | 536 | 564 | 592 | 620 | 648 | 676 | 704 | 732 | 760 | 788 | 816 | 844 | 872 |
| 60% | 390 | 418 | 446 | 474 | 502 | 530 | 558 | 586 | 614 | 642 | 670 | 698 | 726 | 754 | 782 | 810 | 838 | 866 |
| 57% | 384 | 412 | 440 | 468 | 496 | 524 | 552 | 580 | 608 | 636 | 664 | 692 | 720 | 748 | 776 | 804 | 832 | 860 |
| 54% | 378 | 406 | 434 | 462 | 490 | 518 | 546 | 574 | 602 | 630 | 658 | 686 | 714 | 742 | 770 | 798 | 826 | 854 |
| 51% | 372 | 400 | 428 | 456 | 484 | 512 | 540 | 568 | 596 | 624 | 652 | 680 | 708 | 736 | 764 | 792 | 820 | 848 |
| 48% | 366 | 394 | 422 | 450 | 478 | 506 | 534 | 562 | 590 | 618 | 646 | 674 | 702 | 730 | 758 | 786 | 814 | 842 |
| 45% | 360 | 388 | 416 | 444 | 472 | 500 | 528 | 556 | 584 | 612 | 640 | 668 | 696 | 724 | 752 | 780 | 808 | 836 |
| 42% | 354 | 382 | 410 | 438 | 466 | 494 | 522 | 550 | 578 | 606 | 634 | 662 | 690 | 718 | 746 | 774 | 802 | 830 |
| 39% | 348 | 376 | 404 | 432 | 460 | 488 | 516 | 544 | 572 | 600 | 628 | 656 | 684 | 712 | 740 | 768 | 796 | 824 |
| 36% | 342 | 370 | 398 | 426 | 454 | 482 | 510 | 538 | 566 | 594 | 622 | 650 | 678 | 706 | 734 | 762 | 790 | 818 |
| 33% | 336 | 364 | 392 | 420 | 448 | 476 | 504 | 532 | 560 | 588 | 616 | 644 | 672 | 700 | 728 | 756 | 784 | 812 |
| 30% | 330 | 358 | 386 | 414 | 442 | 470 | 498 | 526 | 554 | 582 | 610 | 638 | 666 | 694 | 722 | 750 | 778 | 806 |
| 27% | 294 | 322 | 350 | 378 | 406 | 434 | 462 | 490 | 518 | 546 | 574 | 602 | 630 | 658 | 686 | 714 | 742 | 770 |
| 24% | 258 | 286 | 314 | 342 | 370 | 398 | 426 | 454 | 482 | 510 | 538 | 566 | 594 | 622 | 650 | 678 | 706 | 734 |
| 21% | 222 | 250 | 278 | 306 | 334 | 362 | 390 | 418 | 446 | 474 | 502 | 530 | 558 | 586 | 614 | 642 | 670 | 698 |
| 18% | 186 | 214 | 242 | 270 | 298 | 326 | 354 | 382 | 410 | 438 | 466 | 494 | 522 | 550 | 578 | 606 | 634 | 662 |
| 15% | 150 | 178 | 206 | 234 | 262 | 290 | 318 | 346 | 374 | 402 | 430 | 458 | 486 | 514 | 542 | 570 | 598 | 626 |
| 12% | 114 | 142 | 170 | 198 | 226 | 254 | 282 | 310 | 338 | 366 | 394 | 422 | 450 | 478 | 506 | 534 | 562 | 590 |
| 9% | 88 | 116 | 144 | 172 | 200 | 228 | 256 | 284 | 312 | 340 | 368 | 396 | 424 | 452 | 480 | 508 | 536 | 564 |
| 6% | 62 | 90 | 118 | 146 | 174 | 202 | 230 | 258 | 286 | 314 | 342 | 370 | 398 | 426 | 454 | 482 | 510 | 538 |
| 3% | 36 | 64 | 92 | 120 | 148 | 176 | 204 | 232 | 260 | 288 | 316 | 344 | 372 | 400 | 428 | 456 | 484 | 512 |

**Legend**
- **Establishments**: University-Wide, Libraries, DASA, Alumni Association, College of Sciences, College of Education, College of Agriculture and Life Sciences
- **Programs**: Bachelor of Arts, Bachelor of Science, Master's, Doctorate
- **Faculties**: College of Sciences, College of Education, College of Agriculture and Life Sciences
- **Institutional Reports**: University Advancement - Institutional Reports

**Note:** The table reflects data as of June 30, 2015.
<table>
<thead>
<tr>
<th>Department</th>
<th>Revenue</th>
<th>Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>College of Agriculture and Life Sciences</td>
<td>86,500.25</td>
<td>88,410.72</td>
</tr>
<tr>
<td>College of Education</td>
<td>85,040.87</td>
<td>89,277.77</td>
</tr>
<tr>
<td>College of Humanities &amp; Social Sciences</td>
<td>99,940.47</td>
<td>96,560.90</td>
</tr>
<tr>
<td>College of Pharmacy</td>
<td>84,242.10</td>
<td>89,354.00</td>
</tr>
<tr>
<td>College of Veterinary Medicine</td>
<td>81,310.62</td>
<td>89,277.77</td>
</tr>
<tr>
<td>College of Business</td>
<td>80,080.10</td>
<td>80,080.10</td>
</tr>
<tr>
<td>College of Natural Resources</td>
<td>81,680.95</td>
<td>81,680.95</td>
</tr>
<tr>
<td>College of Education</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Engineering</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Fine Arts</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Nursing</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Public Health</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Medicine</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Science</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Design</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Information</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Information and Life Sciences</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Humanities</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Education</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Business</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Agriculture and Life Sciences</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Education</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Business</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Agriculture and Life Sciences</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Humanities</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Education</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Business</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
<tr>
<td>College of Agriculture and Life Sciences</td>
<td>88,080.25</td>
<td>88,080.25</td>
</tr>
</tbody>
</table>
The Division of University Advancement exemplifies NC State's *Think and Do* attitude. Advancement’s team of dedicated professionals works tirelessly to create and enhance the positive relationships between NC State and its many constituents that enhance a culture of philanthropy and help elevate this remarkable university to unsurpassed levels of support and success.

University Advancement provides the critical foundation of support from key publics ranging from alumni to peer institutions, from donors to the media, from prospective students to campus employees and beyond, that enables NC State to advance the five key goals of the university’s Strategic Plan.

Across its departments of Development, Alumni Relations, Advancement Services and University Communications, built on the core support of its Finance and Administration unit, University Advancement professionals are driving unsurpassed achievements that empower NC State to achieve its strategic goals and be recognized as the nation’s preeminent research enterprise.

University Advancement’s internal theme for FY15 was “Showcasing the Power of Philanthropy,” with an emphasis on demonstrating the impact philanthropy has on NC State, its students and its faculty. This theme was most evident in the Celebration of Philanthropy event (which replaced the Lifetime Giving Gala) and in public gift announcements for several new significant gift commitments.

The University Advancement team is proud to play an important role in NC State’s many past, current and future accomplishments, and is dedicated to fueling the momentum that launches NC State as it strives to even greater heights. Key accomplishments of the past year are highlighted in the sections that follow.

**Record year in fundraising outcomes**

The outstanding efforts and impressive bottom-line results of an effective cross-university development staff form the core of a robust Advancement operation and a strong university. Fiscal year 2015 represented another record-breaking year for development and an unsurpassed year of raising funds for NC State. A few highlights include:

- Gifts and new commitments totaled $208.47 million, the highest total in NC State history.
- Campaign commitments totaled an impressive $723.57 million by the end of the fiscal year, the second full year of the Nucleus Phase of NC State’s most ambitious comprehensive fundraising effort, positioning the University well for the anticipated public launch of the Campaign in Fall 2016.
- Gifts were received from all 100 counties in North Carolina and all 50 U.S. states.
• Annual Giving to the University experienced a 10.5% increase over FY14 and a 177.5% increase over the past five years.

• New commitments to the endowment reached $106.5 million, representing over half of all new gifts and commitments.

• Gift receipts totaled $119 million, driving the fourth straight year of $100-million-plus gift receipts. Of the total, $38 million was designated for endowment.

• NC State inducted 60 new members into its R. Stanhope Pullen Society which recognizes individuals who provide critical support for the university through deferred gifts. http://giving.ncsu.edu/2015/pullen-society-welcomes-new-members/

• The College of Agriculture and Life Sciences finished the year with an astounding $57.2 million in gifts and commitments, and the College of Veterinary Medicine raised over $33 million.

• The College of Engineering secured almost $20 million in new conditional commitments toward a potential new Engineering building, currently being considered by the State Legislature.

• NC State fundraisers secured an impressive number transformational seven- and eight-figure commitments to support key priorities across the university, including:
  - A $16 million gift from The Randall B. Terry Charitable Foundation to fund faculty, students and research in Veterinary Medicine. https://news.ncsu.edu/2015/04/terry-lasting-legacy/
  - A $12.4 million grant to Agriculture and Life Sciences from the Bill & Melinda Gates Foundation for sweet potato research that will improve the health and lives of people in sub-Saharan Africa. https://news.ncsu.edu/2014/09/nc-state-receives-sweet-potato-grant/
  - A $8.1 million gift to create the Moise A. Khayrallah Center for Lebanese Diaspora Studies represents the largest single gift in CHASS history and the university’s first endowed center. https://news.ncsu.edu/2014/10/khayrallah-center/
  - A $4.5 million estate gift from NC State University Professor Emeritus Dr. George Kriz and his wife, Rhoda Kriz, to fund multiple endowments within CALS, supporting faculty salary supplements and/or start-up equipment for new faculty members, study leaves to enhance research effectiveness as well as the creation of distinguished professorships.
  - A $2.5 million grant from Duke Energy Foundation for College of Engineering to support research in renewable energy and efforts to attract and retain underrepresented groups in the college. https://news.ncsu.edu/2015/04/renewable-energy-diversity-grant/
  - An eight-figure anonymous gift to fund student scholarships.
  - Seven gifts to CALS of at least seven figures, totaling more than $21.2 million dollars to support a variety of innovative academic and research programs.
Six gifts to Engineering of at least seven figures, totaling over $10.8 million for the support of faculty, students and facilities.

- Other highlights include several colleges and units that posted notable rates of increased fundraising over the last fiscal year.
  - College of Humanities and Social Sciences - 287% increase.
  - College of Textiles - 117% increase.
  - Divisions of Academic and Student Affairs (DASA) including ARTS NC State -100% increase.
  - College of Education - 81% increase.
  - College of Design - 71% increase.
  - College of Agriculture and Life Sciences - 66% increase.
  - College of Veterinary Medicine - 64% increase.
  - College of Sciences - 24% increase.
  - Poole College of Management - 12% increase.
  - College of Engineering - 7% increase.
  - University Libraries - 6% increase.
  - Wolfpack Club/Athletics - 38% increase.

- The Our Three Winners scholarship fund, created in February in memory of NC State alumni Deah Barakat and Yusor Abu-Salha and NC State student Razan Abu-Salha, grew to $185,832 from gifts received from 34 states and 6 countries. More than 50 percent (371 of 669) of the donors who supported this fund were first time donors to the university. NC State expects to award the first Our Three Winners scholarships this fall. One month into FY16, the fund balance grew to $285,000.

- Regional "councils" of alumni and donors in Charlotte, Richmond and Wilmington were established to assist in the identification and cultivation of prospects in the respective regions.

As a result of a strong, dedicated development team, this philanthropic support is making a tremendous difference in the daily life and future success of NC State.

Motivating the worldwide Wolfpack

Actively and effectively engaging tens-of-thousands of NC State alumni in the life of the university is a vital measure of NC State’s success. NC State alumni of all ages and walks of life -- spread throughout North Carolina, across the United States and around the globe -- are the foundation the university’s broad support and ongoing success. Fortunately, the Alumni Association experienced another outstanding year, meeting and exceeding nearly every strategic goal. A few highlights follow:

- Alumni Association membership reached an all-time high over the year reaching more than 25,000 active members, leading to revenue of more than $630,000.
• Over the past five years the association has grown membership by 25% while increasing revenue by 20%.

• The Student Alumni Association’s programming and reputation continued to grow, driving its membership to a record high of 3,000 in 2015.

• Outstanding budget management and performance led to growing the Association’s quasi endowment to $7.75 million.

• Recognized for being first in Facebook engagement rates and second in adoption rates among all ACC alumni associations.
  • Also ranked number one in the ACC and number five in the NCAA in alumni engagement via social media.
  • The Alumni Magazine staff earned five prestigious awards in the CASE District III competition.

• Successfully moved the Evening of Stars Gala to the fall, honoring 20 alumni at the event. Also successfully moved the Legacy Luncheon to The Brickyard, delighting more than 850 who attended.

• Revitalization and strengthening of alumni networks continued with Atlanta, DC and Austin leading the way by offering a wide range of activities and programming to engage alumni.

• The Alumni Association Student Ambassadors were recognized as the "Outstanding Student Leadership Organization" and for "Outstanding Teamwork/Collaboration by a Student Organization" by the University.

• The Wake County chapter had a very successful year of programming engaging more than 1000 alumni, culminating in Wolfpack Service Day where alumni and their families volunteered at several local community organizations.

• Launched the “State Mates” program to engage alumni couples, with the goal of making it an annual event.

• The Alumni Entrepreneurs Network had a stellar inaugural year including hosting bi-monthly events that averaged 70-80 alumni.

• The 2015 Wolfpack Freshman Welcomes (FWF) hosted 1040 attendees from more than 110 towns across North Carolina spanning from Asheville to the Outer Banks. The program witnessed a 28% increase over 2014 and a 109% increase from 2013. http://www.alumni.ncsu.edu/s/1209/interior-hybrid-2colmin.aspx?sid=1209&gid=1&pgid=361

• The 2015 Legacy Admissions sessions drew 400 attendees from more than 50 towns across the state. The sessions saw a 19% increase over 2014 and a 43% increase from 2013.

• Alumni Outreach events in 2015 had great success, driven by enhanced programming at group sports cutings, vineyard and brewery tours by bringing university speakers, providing targeted messaging and more assistance to the networks in planning engaging and effective events.
- Launched the Holiday Ornament series featuring the NC State Bell Tower, selling out more than 400 ornaments. As a result, next year, two ornaments will be offered.

- Partnered with NC State Bookstores to rebrand the office NC State class ring program. New materials will launch this fall with the unveiling of the “big ring” at Wolfpack Outfitters inside the Talley Student Union in September.

- Redesigned the alumni blog, Red&WhiteForLife, to be a mobile friendly design aligned with the university’s core brand. http://www.alumniblog.ncsu.edu/

- Built and maintained the university’s Homecoming site in 2014, attracting more than 8,000 page views in three weeks.

- The WolfTreks Travel Program identified more than 12 potential donors and garnered more than $67,000 in revenue. http://www.alumni.ncsu.edu/s/1209/interior-hybrid.aspx?sid=1209&gid=1&pgid=318

- Selected 26 students for the 43rd class of Caldwell Fellows. http://caldwellfellows.ncsu.edu/2015/02/welcome-the-class-of-2018/

- Negotiated a new insurance affinity partner, doubling revenue and securing a signing bonus.

- Distributed 417 separate email pushes during the fiscal year, announcing events, membership offers, travel programs and more.

- Produced a video with former Gov. Hunt to promote membership that was released this summer.

The Alumni Association’s extraordinary efforts are ensuring a broad range of support that will help ensure a successful Campaign and achieve NC State’s Strategic Plan.

Driving success behind the scenes

Imperative to the success of a strong Advancement operation is the effectiveness of an excellent Advancement Services team. Enabling all areas of University Advancement to be successful, Advancement Services manages the university’s alumni and donor database, works to process gifts and conduct research about donor opportunities, and oversees development communications and donor relations.

The team's productivity remained high throughout the year and efforts helped lead to record fundraising for NC State. A few highlights follow.

- Campaign Counting guidelines were updated and approved by the Board of Trustees.

- Preliminary Campaign reports were created to track progress by college/unit.

- Worked collaboratively with the colleges and University Communications to create compelling gift announcements including:
- The Zelnak and Khayrallah gift announcements set the new standard and were reinforced by the impressive Celebration of Philanthropy event.
- The Terry Foundation gift announcement made the Associated Press wire and was picked up nationally by the major dailies.
- Conducted a comprehensive wealth screening and major gift modeling project with WealthEngine, and began review and analysis of data.
- Worked closely with chief development officers to build a strategy for prospect development at NC State to support the Campaign.
- Upgraded the Advance system and launched the new SAS Business Intelligence system
- Implemented a new online giving platform – iModules. Its mobile friendly interface offers additional features including a donor portal, email marketing and event management.
- The gift agreement review and approval process was completely revamped to make it donor friendly and efficient for development.
- Implemented process change in the Distinguished Professorships program. NC State currently has 13 distinguished professorships in the queue awaiting the state gift match.
- Development Communications and Donor Relations took the lead in telling the story of philanthropic impact at all levels and working to promote those messages through existing channels within the colleges and units.

Communications that drive and promote success

University Communications completed a watershed year, strongly supporting Advancement and helping the university achieve its Strategic Plan. Throughout the fiscal year, UComm focused its work on: ensuring efforts moved the division and university toward achieving goals; successful implementation of the NC State brand; effective execution of organization and process improvements; improvement of campus-wide collaboration; and laying the groundwork for a successful Campaign. Highlights follow.
- Led the Brand Refresh, creating the platform for ongoing communications success across NC State as well as building a launch pad for successful Campaign communications.
  - Publicly launched and continually updated the Brand Site, a living toolkit providing campus all it needs to be on brand. www.brand.ncsu.edu
  - Launched the official “brand policy” from the Chancellor.
  - Conducted a brand awareness push including campus-wide communications, social media contests, branded collateral giveaways and Brand Camp.
  - Surveyed NC State staff and faculty about the brand: 93% of respondents reported being very or somewhat familiar with the brand and 85% were able to identify “Think and Do” as a statement of what makes NC State different from and better than the competition.
- Tracked more than 42,000 news stories for the year from print, broadcast and digital formats worldwide, demonstrating a 700 percent increase over four years.
  - Generated an equivalent ad value of $65.6 million.
  - More than 2,000 stories appeared in the Top 100 news outlets.
- Welcomed a new Assistant Vice Chancellor for Marketing Communications, adding a new level of expertise and experience.
- Launched NC State News providing a dynamic format to share stories with key audiences, centralizing four sites while increasing collaboration. [www.news.ncsu.edu](http://www.news.ncsu.edu)
  - 95% increase in total sessions.
  - 51% increase in new visitors.
  - 222% increase in mobile traffic.
  - 114% increase in social traffic.
- The innovative Abstract research blog received 315,000 views, a 300 percent increase over the last three years, leading to story placements in the most significant media worldwide.
- Set new readership records for The Bulletin, more than tripling annual readership from just two years ago to more than one million page views while increasing time on site.
- NC State University's Home Page garnered more than 10.5 million visitors.
- NC State's Core Site generated 20.5 million page views.
  - 63% increase in new visitors.
  - Users spent 21% more time on the site.
  - Average session duration increased 57%.
- Launched redesigned homepage and core site that served as an exemplary model of on-brand communication.
  - 57% increase in average time on site.
  - 14% increase in average pages per session.
  - 67% increase in mobile traffic.
- Increased Facebook likes by 11% and engagement by 80%.
- Launched NC State's new LinkedIn page and grew it to more than 157,000 followers.
- Grew Twitter follower base by 71% and increased engagement 457%.
- Drove Instagram followers by 106% to 18,000 followers, and more than 250,000 engagements.
- Think and Do focused ads led to more than 3.7 million print and 15.5 million digital impressions.
- Placed a series of ads in leading publications including Forbes, Fortune, Smithsonian, Time, Bloomberg and BusinessWeek reaching more than 1.3 million readers.
- Targeted peer influencers through a series of Chronicle of Higher Education and Inside Higher Ed ads driving more than 2.1 million impressions.
- Placed banners on CNN generating 9 million impressions.
- Executed a Charlotte digital campaign driving 3.3 million impressions.
- Placed high-visibility digital ads in RDU and Charlotte airports driving more than 36 million impressions.
- Produced the Institutional Spots for television and radio, and print ads for football and basketball programs driving tens of millions of impressions.
- Hosted more than 16,000 guests at university events, ensuring all had a quality, positive, on-brand experience.
- Welcomed more than 300 individuals for exclusive dinners and another 1400 guests for private receptions at The Point.
- Served as the chief planners for the many high-profile university-wide events that helped set the stage for the Campaign.
- Garnered 20 top higher education and industry awards and much recognition for excellence spanning areas of the brand, writing, photography, media relations, social media, web and digital, marketing and the institutional spot.

Of course, none of the above accomplishments would be possible without the core support the Advancement’s Finance and Administration team that focused on providing ongoing human resources services, budget administration and support for the NC State University Foundation, among other key functions.

University Advancement began experiencing its true potential over the last year, operating more strategically, efficiently, and collaboratively. The team’s hard work and tireless dedication enabled NC State to advance its strategic goals and helped elevate the university to unsurpassed levels of success. Building on the work of amazing students, faculty and staff, with the continued support of the university and its tremendous alumni and friends, there is almost no limit to what University Advancement, and NC State, can accomplish.

As we look forward, University Advancement will seek to continue leveraging the University’s tremendous overall momentum to engage even greater numbers of alumni, faculty and staff, friends and partners in preparation for the public launch of the University’s most ambitious comprehensive fundraising Campaign in Fall 2016.

Go Pack!
Aug. 20, 2015

Francine Cronin Named NC State Associate Vice Chancellor for University Development

FOR IMMEDIATE RELEASE

Francine Cronin, senior assistant vice president for capital projects and advancement communications and associate director of university campaigns at the University of Rochester, has been named associate vice chancellor for university development at North Carolina State University. Vice Chancellor of University Advancement Brian Sischo announced the appointment today.

Cronin will begin her new position at NC State in early October.

“Francine Cronin has a proven track record of success across the spectrum of university fund-raising activities, from implementing effective annual giving and major gifts programs to securing planned gifts and managing comprehensive campaigns,” Sischo said. “I’m confident Francine will hit the ground running and will be a great addition to NC State’s University Advancement team.”

Cronin brings with her more than 25 years of experience in university development, and among many accolades has played a leadership role in planning, implementing and managing several successful comprehensive fund-raising campaigns.

“Accessible education contributes greatly to the formation and maintenance of a successful and prosperous multicultural society,” Cronin said. “Fund raising plays a critical role in keeping higher education affordable and accessible. I’m thrilled to be joining the NC State team and excited to bring creativity and innovative fund-raising strategies to a university that has such a large and positive impact across the state, nation and world.”

Cronin has served at the University of Rochester since 2010. During that time, she played a critical role in launching the university’s current $1.2 billion comprehensive campaign, expanded communications effectiveness through new regional networks and helped establish the university’s first faculty/staff giving campaign.

Cronin served as assistant, associate and senior associate vice president for annual giving at Emory University from 2003-10. There, she helped triple annual giving, started an online
giving program and played a major role in the success of Emory’s $1.6 billion comprehensive campaign.

She also served as director of development, director of development and alumni relations and executive director for the Institute of Technology Foundation at the State University of New York Institute of Technology at Utica/Rome. She exponentially grew alumni giving, the number of alumni donors and the number of parent donors during her tenure at SUNYIT.

Cronin began her career as assistant director of the telefund program and director of annual fund programs at Rochester Institute of Technology. There she played a major role in the success of the university’s capital campaign and initiated senior class and faculty/staff giving programs.

Cronin earned her bachelor’s degree in communication from SUNY Geneseo and her master’s degree in career and human resource development from the Rochester Institute of Technology.

-kulikowski-
Nationally, only 8% of alumni give back to their alma mater.

However, for those alumni that are members of their respective alumni association the percentage rises to over 25%.
At NC State that number is 43%
The NC State Alumni Association has shown an overall membership increase of 25% and revenue increase of 20%.

...over the last five years has shown an increase in Student Alumni Association membership of 300%.

...leads the ACC in alumni engagement via social media.

...was named by the Princeton Review as having a nationally ranked top 25 alumni network in 2015.

...provides over $750,000 annually in financial aid to 150 students (including 75 Caldwell Fellows).
Mission Statement

The NC State Alumni Association engages alumni and friends through programs and services that foster pride and enhance a lifelong connection to NC State.
Aggressive Social Media Strategy

Over a four year period went from last in the ACC to top two in social media engagement results/rankings

Rankings by Engagement Rate:
1. NC State
2. Notre Dame
3. UNC
4. Boston College
5. Pittsburgh
6. Louisville

Rankings by Alumni Adoption Rate:
1. Notre Dame
2. NC State
3. Clemson & UNC
4. Miami & Georgia Tech
5. Duke

Event invitation & pricing strategy constantly reviewed

- Based on event type – who/how to issue invitations
- Email invitations sent to all that fall within the geographic footprint
- Print invitations when budget allows to targeted audience
- Pricing strategies
  - Low cost but not "no value"
  - Membership rewarded with price break
- Early registration for AA members for more popular and/or exclusive type events
Life Stage Programming

Legacy Admission Sessions

Spring 2015
- Charlotte, NC (May 17 - Talley Student Union)
- Raleigh, NC (May 17 - Talley Student Union)
- Winston Salem, NC (May 30 - Bib's Downtown)

Three sessions each year – one in Raleigh and two rotating in other NC locations (Charlotte, Asheville, Greensboro, Wilmington, Winston Salem)
Life Stage Programming

Wolfpack Freshman Welcomes

Spring 2015

Raleigh
Wilmington
Outer Banks
Greensboro
Yadkinville
Charlotte

Focus on fewer events (six - geographically based in NC)
Nicer locations with nicer meals
Video instead of slides
Less presentation and more networking time

NC STATE
Job Fairs with Alumni Career Services

(Walt Wolfrom, Sara Spayd, Kate Meiers)

NC State Faculty Presentations:

- Boston Red Sox
- (Warren)
- Charlotte Hornets vs Phoenix (T.J.
- Grasshoppers in Greensboro
- NC State vs UNC-C in Charlotte
- Sporting Events
- NC (Children's & Raffaldini)
- Houston area
- Winery events (tours / tastings)

Successes for FY15
Events Promoted via Web and Social Media
2015 Legacy Luncheon
19th Annual Legacy Luncheon
Held Saturday, August 15, 2015
2015 Evening of Stars
Moved to week of Homecoming
Thursday, October 29, 2015
Events for FY16

- Chancellor's event in Wilmington (September 24, 2015)
- Chancellor's event in San Francisco (October 8, 2015)
- Annual Chancellor's event in Greensboro (November 9, 2015)
- Annual Beaufort County Oyster Roast (January, 2016)
- Chancellor's events in Charlotte and possibly two other areas being planned for late winter/spring
"For the Strength of the pack is the wolf, and the strength of the wolf is the PACK STRONG."

NC STATE
Committee Discussion

Social Media Strategy & Campaign Communications Update

Case Commons Project Overview and Facility Naming Opportunities
Introductions
Project Leadership

Jason Simon
Vice President and Partner
NC State 1992 Communication

Matt Checkowski
Executive Creative Director
NC State 1998 Design
SimpsonScarborough
Building Brands That Endure
Our Approach
Keys to Success

• Be an extension of the NC State team
• Engagement and consensus building
• Develop a right-sized process that fits NC State best
• Move past anecdotal feedback
• Develop recommendations that are actionable and realistic
• Ensure that the strategy aligns and adds value to overall branding efforts
Phase I
Discovery and Audit

Develop a shared understanding of NC State’s campaign goals and the resources needed across stakeholder groups.

Conduct an audit of Development communications across the University to determine opportunities for alignment, staffing and resources, and tools needed to be successful.
## Phase I
Discovery and Audit

<table>
<thead>
<tr>
<th>Questions</th>
<th>Approach</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are the most important target audiences and how are those prioritized?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are the most effective current Development communications activities?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What’s missing? What do Development Officers really need or want?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What channels are most effective?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are leadership expectations around support?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do various stakeholders align to the suggested campaign themes/priorities?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Phase I
Discovery and Audit

Questions

- Who are the most important target audiences and how are those prioritized?
- What are the most effective current Development communications activities?
- What's missing? What do Development Officers really need or want?
- What channels are most effective?
- What are leadership expectations around support?
- How do various stakeholders align to the suggested campaign themes/priorities?

Approach

- Background review
  - Feasibility study
  - DoD communications inventory
  - Current brand strategy
  - Current development communications activity, staffing, and skillset(s) required
- 2-3 day campus visit
  - Project planning team discussions
  - Workshops with Communications and Development Officers
  - Chancellor interview
  - 1:1 interviews with Deans
  - Campus tour and review of key initiatives and stakeholders

Deliverable

Higher Ed Environmental Scan
Phase I
Discovery and Audit

Questions:

- Who are the most important target audiences and how are those prioritized?
- What are the most effective current Development communications activities?
- What's missing? What do Development Officers really need or want?
- What channels are most effective?
- What are leadership expectations around support?
- How do various stakeholders align to the suggested campaign themes/priorities?

Approach:

Background review
- Feasibility study
- DoD communications inventory
- Current brand strategy
- Current development communications activity, staffing, and skillset(s) required

2-3 day campus visit
- Project planning team discussions
- Workshops with Communications and Development Officers
- Chancellor interview
- 1:1 interviews with Deans
- Campus tour and review of key initiatives and stakeholders

Higher Ed Environmental Scan

Deliverable:

Detailed report that will:
- Summarize key input(s) and findings across stakeholders
- Provide detail on environmental scan detailing staffing, resources and tactics
- Prioritize key communications tactics, channels and other opportunities
- Recommend staffing approach, levels and resources that maximize the opportunity for success
- Provide best-practice recommendations for effective development channels, initiatives and materials specifically in “campaign”
Phase II
Research and Insight

Gather insights to ensure that internal perceptions and priorities match donor realities.

Determine the ways in which target donors want to engage, effective channels, and gauge reaction to campaign priorities and messaging themes.
## Phase II
Research and Insight

<table>
<thead>
<tr>
<th>Questions</th>
<th>Approach</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>- What are the current/desired levels of engagement for alumni/donors?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Are there specific areas that have the most appeal for support (research, scholarships, buildings, special opportunity) and how does that vary by age, income or other factors?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- How resonant are the campaign categories and do they align to donor priorities?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- What are the most effective channels and tactics and how do people prefer to be reached?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Where do their philanthropic priorities lie?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Phase II
Research and Insight

Questions

- What are the current/desired levels of engagement for alumni/donors?
- Are there specific areas that have the most appeal for support (research, scholarships, buildings, special opportunity) and how does that vary by age, income or other factors?
- How resonant are the campaign categories and do they align to donor priorities?
- What are the most effective channels and tactics and how do people prefer to be reached?
- Where do their philanthropic priorities lie?

Approach

Qualitative Research
- 2-4 online focus groups with donors of varying levels
- 2 online focus groups with undergraduate alumni LYBUNTS
- 2 online focus groups with undergraduate alumni lapsed donors
- 20 In-depth interviews with foundation/corporate relations or other more targeted giving prospects

Quantitative Research
- Online survey of Donors and Alumni (n=1,200)
# Phase II
Research and Insight

<table>
<thead>
<tr>
<th>Questions</th>
<th>Approach</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the current/desired levels of engagement for alumni/donors?</td>
<td><strong>Qualitative Research</strong></td>
<td>• Work with NC State to collect data files, scrub for redundancy and code to required spec(s) for secondary factors</td>
</tr>
<tr>
<td>• Are there specific areas that have the most appeal for support (research, scholarships, buildings, special opportunity) and how does that vary by age, income or other factors?</td>
<td>• 2-4 online focus groups with donors of varying levels</td>
<td>• Survey instrument design, development, programming and QA</td>
</tr>
<tr>
<td>• How resonant are the campaign categories and do they align to donor priorities?</td>
<td>• 2 online focus groups with undergraduate alumni LYBUNTS</td>
<td>• Detailed report of both qualitative and quantitative research findings</td>
</tr>
<tr>
<td>• What are the most effective channels and tactics and how do people prefer to be reached?</td>
<td>• 2 online focus groups with undergraduate alumni lapsed donors</td>
<td>• All secondary data analysis and delivery of SPSS data in native and Excel formats.</td>
</tr>
<tr>
<td>• Where do their philanthropic priorities lie?</td>
<td>• 20 In-depth interviews with foundation/corporate relations or other more targeted giving prospects</td>
<td></td>
</tr>
</tbody>
</table>

**Quantitative Research**

• Online survey of Donors and Alumni (n=1,200)
Phase III
Campaign Messaging and Identity

- Develop a strategic messaging framework that drives the campaign and a communications plan that outlines timeline and tactics.

- Create a campaign identity and design concepts that provide an emotional and visual representation of bringing the strategy to life.
Phase III
Campaign Messaging and Identity

<table>
<thead>
<tr>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• How can the strategy and messaging frame work be lifted off the page?</td>
</tr>
<tr>
<td>• What images and narratives will drive action from alumni and donors?</td>
</tr>
<tr>
<td>• What personality, tone and visual approach will build excitement?</td>
</tr>
<tr>
<td>• How do we align creative strategies and add dimension to the broader digital-first brand that NC State has established?</td>
</tr>
</tbody>
</table>
# Phase III
Campaign Messaging and Identity

<table>
<thead>
<tr>
<th>Questions</th>
<th>Approach</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>• How can the strategy and messaging framework be lifted off the page?</td>
<td>• Develop donor audience personas and journeys that illustrate ways in which constituents ideally will engage with NC State</td>
<td></td>
</tr>
<tr>
<td>• What images and narratives will drive action from alumni and donors?</td>
<td>• Identifying opportunities creative and content strategies to meet them where they are and move to an increased relationship and willingness to support.</td>
<td></td>
</tr>
<tr>
<td>• What personality, tone and visual approach will build excitement?</td>
<td>• Develop a campaign “mantra” that guides all creative development.</td>
<td></td>
</tr>
<tr>
<td>• How do we align creative strategies and add dimension to the broader digital-first brand that NC State has established?</td>
<td>• Apply learnings from research and build upon NC State’s current “Think and Do” brand strategy in creative concepts.</td>
<td></td>
</tr>
</tbody>
</table>
## Phase III
### Campaign Messaging and Identity

<table>
<thead>
<tr>
<th>Questions</th>
<th>Approach</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>• How can the strategy and messaging framework be lifted off the page?</td>
<td>• Develop donor audience personas and journeys that illustrate ways in which constituents ideally will engage with NC State</td>
<td>• Strategic messaging framework and content strategy</td>
</tr>
<tr>
<td>• What images and narratives will drive action from alumni and donors?</td>
<td>• Identifying opportunities creative and content strategies to meet them where they are and move to an increased relationship and willingness to support.</td>
<td>• 2-3 versions of campaign name and identity</td>
</tr>
<tr>
<td>• What personality, tone and visual approach will build excitement?</td>
<td>• Develop a campaign “mantra” that guides all creative development.</td>
<td>• 2-3 campaign design concepts that illustrate how the campaign will come alive through various channels with an emphasis on a digital-first approach</td>
</tr>
<tr>
<td>• How do we align creative strategies and add dimension to the broader digital-first brand that NC State has established?</td>
<td>• Apply learnings from research and build upon NC State’s current “Think and Do” brand strategy in creative concepts.</td>
<td>• Campaign communications plan, budget and timeline</td>
</tr>
</tbody>
</table>
Timeline

**Months 1-2**
- Audit & Insight
  - Background immersion
  - Project kick-off and planning discussions
  - Campus visit and workshops
  - Environmental scan and best practices
  - **Deliver audit report**
    - Collect necessary data files and secure focus group participants
    - Draft and approval of moderator and discussion guides

**Months 2 – 3**
- Research & Strategy

**Months 4 – 6**
- Strategy & Creative

**On-Going**
- Support
## Timeline

<table>
<thead>
<tr>
<th>Months 1-2</th>
<th>Months 2 – 3</th>
<th>Months 4 – 6</th>
<th>On-Going</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Audit &amp; Insight</strong></td>
<td><strong>Research &amp; Strategy</strong></td>
<td><strong>Strategy &amp; Creative</strong></td>
<td><strong>Support</strong></td>
</tr>
<tr>
<td>Background immersion</td>
<td>Conduct qualitative research IDI’s and FG’s</td>
<td>Preliminary messaging strategies and visual approaches</td>
<td>Draft and approval of survey instruments</td>
</tr>
<tr>
<td>Project kick-off and planning discussions</td>
<td>Deliver qualitative research findings and share audit findings</td>
<td>Survey instrument programming and QA</td>
<td>Begin survey data collection</td>
</tr>
<tr>
<td>Campus visit and workshops</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environmental scan and best practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Deliver audit report</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect necessary data files and secure focus group participants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draft and approval of moderator and discussion guides</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

*Simpson Scarborough*
**Timeline**

**Months 1-2**

**Audit & Insight**
- Background immersion
- Project kick-off and planning discussions
- Campus visit and workshops
- Environmental scan and best practices
- **Deliver audit report**
  - Collect necessary data files and secure focus group participants
  - Draft and approval of moderator and discussion guides

**Months 2 – 3**

**Research & Strategy**
- Conduct qualitative research IDI’s and FG’s
- **Deliver qualitative research findings and share audit findings**
- Preliminary messaging strategies and visual approaches
- Draft and approval of survey instruments
- Survey instrument programming and QA
- Begin survey data collection

**Months 4 – 6**

**Strategy & Creative**
- Deliver quantitative research findings and secondary data
- Preliminary and revised campaign naming and identity concepts
- Strategic messaging framework
- Creative concepts designed to illustrate the refined and selected identity
- Develop and deliver communications plan

**On-Going**

**Support**
### Timeline

#### Months 1-2
- **Audit & Insight**
  - Background immersion
  - Project kick-off and planning discussions
  - Campus visit and workshops
  - Environmental scan and best practices
  - **Deliver audit report**
    - Collect necessary data files and secure focus group participants
    - Draft and approval of moderator and discussion guides

#### Months 2 – 3
- **Research & Strategy**
  - Conduct qualitative research IDI’s and FG’s
  - **Deliver qualitative research findings and share audit findings**
  - Preliminary messaging strategies and visual approaches
  - Draft and approval of survey instruments
  - Survey instrument programming and QA
  - Begin survey data collection

#### Months 4 – 6
- **Strategy & Creative**
  - Deliver quantitative research findings and secondary data
  - Preliminary and revised campaign naming and identity concepts
  - Strategic messaging framework
  - Creative concepts designed to illustrate the refined and selected identity
  - Develop and deliver communications plan

#### On-Going
- **Support**
  - Additional college or unit-based support as needed and scoped
  - Creative support as needed to execute communications plan
  - Resource and extension for University Communications
Central Campus Precinct – MP Impacts
Planning Studies in Progress
Case Commons - Student Housing
Case Commons - Student Housing
Case Commons - Student Housing

28,400 GSF – 4 levels

62-student beds
- 30-beds student athletes
- 32-beds non-athletes

Resident director apartment
2 Resident assistant rooms

Gathering space
24-hour desk
Theater/meeting room
Laundry

Funding: receipts and gifts
# Naming Opportunities for Case Commons

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Naming Rights to the facility</td>
<td>$5,000,000</td>
</tr>
<tr>
<td>Dorm Lobby/Entrance Foyer</td>
<td>$500,000</td>
</tr>
<tr>
<td>1&lt;sup&gt;st&lt;/sup&gt; Floor Social Lounge</td>
<td>$250,000</td>
</tr>
<tr>
<td>Team Meeting/Theatre Room</td>
<td>$250,000</td>
</tr>
<tr>
<td>Study Room</td>
<td>$150,000</td>
</tr>
<tr>
<td>Atrium</td>
<td>$150,000</td>
</tr>
<tr>
<td>Terrace</td>
<td>$150,000</td>
</tr>
<tr>
<td>Men’s Basketball Players Room (qty 15)</td>
<td>$100,000 each</td>
</tr>
<tr>
<td>Women’s Basketball Players Room (qty 15)</td>
<td>$100,000 each</td>
</tr>
<tr>
<td>Non-Athlete Rooms (qty 32)</td>
<td>$50,000 each</td>
</tr>
</tbody>
</table>

**Total** $11,050,000