Campaign Planning

Administrative Leadership Meeting

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Vice Chancellor for University Advancement

November 6, 2012
The Next Campaign

Silently launch on July 1, 2013 at the end of the year-long 125th Anniversary Celebration

Tentatively planning for an eight year campaign, with a goal of $1.5 billion

Focus campaign on building the University’s Endowment – at least 33% of the goal

Significant expansion in the number of donors to this campaign
Campaign Planning

- Continued growth in fund raising

- Hired campaign counsel Bentz Whaley Flessner
  - Internal campaign readiness assessment
  - Feasibility study
Continued Growth in Fund Raising
Gifts & New Commitments Results
Grew 24% from FY09 to FY12

- FY09: $89,434,944
- FY10: $77,959,944
- FY11: $94,756,666
- FY12: $100,323,833
- FY13 GOAL: $103,300,000
Gift Receipts Results

Grew 12% from FY09 to FY12
Annual Giving Results
Alumni Giving grew 105% from FY09 to FY12

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<thead>
<tr>
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<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13 Goal</th>
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<tr>
<td>Alumni Dollars</td>
<td>$772,566</td>
<td>$729,901</td>
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<tr>
<td>Total Dollars</td>
<td>$964,899</td>
<td>$979,031</td>
<td>$1,385,375</td>
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Alumni Participation Rates 2010-11

In FY2012, NC State’s participation rate increased to 13.5%
Solicitation Activity
(Through Sept. 18, 2012)

We are actively soliciting major gifts
- 308 proposals pending
- $122,250,000 pending

We plan to solicit even more
- 237 proposals submitted
- $13,177,010 in “new asks”
Internal Campaign Readiness Assessment
Internal Campaign Readiness Assessment

- Dozens of interviews with senior and mid-level staff
- Electronic survey of all Advancement personnel
- Analytics of accumulated data
- Interim report delivered in May
- Sixteen recommendations to get ready
Recommendations

- Increase productivity of existing fund raisers
- International efforts – Asia and Middle East
- Parents major gift program
- Add fund raising and operations positions (19)
- Increase circulation of NC State magazine
- Cost/benefit analysis of Alumni Association membership model
Recommendations

- Implement campaign procedures and policies – and follow them
- Train, train and train some more
- Conduct a records and gift processing audit to increase efficiency and improve quality of information
- Enhance capacity in analytics
Feasibility Study
Data Collection

- 49 interviews conducted by BWF consultants
- 182 interviews conducted by our own professional fund raisers
- Electronic survey – 561 respondents
- Analysis of our own data
What Did We Learn?

Leadership

- Chancellor Woodson and his senior management team are highly regarded.
- Expectations for board leadership in giving
- Wanted – Volunteer leadership
Development of Draft Campaign Prospectus

- Worksheets sent to all administrative and academic units
- Request for “big ideas” and funding needs tied to the strategic plan ($4.3B in ideas submitted!)
- Draft completed in late June; used in feasibility interviews
Case Prospectus

Focused on Themes

- Lead the nation in student success
- Recruit and support the best faculty
- Globalize the university
- Address society’s grand challenges
- Create jobs and economic value
- Enhance traditions
Case Statement

- Focus on some “Big Ideas”
- Provide giving opportunities listed by university and unit
Support for Endowment
Endowment - 2010-11
As of June 30, 2012, NC State’s endowment grew to $635 million

Source: VSE

- Texas A&M
- Wisconsin
- Purdue
- Penn State
- Michigan State
- Georgia Tech
- Ohio State
- Florida
- Illinois
- California- Davis
- Rutgers
- NC State
- Iowa State
- Virginia Tech
- Arizona
- Maryland
Endowment Per Student 2010-11

As of June 30, 2012, NC State’s endowment per student totaled $18,264
Endowment Fund Raising Results

![Graph showing Endowment Fund Raising Results](image-url)
Potential Donors
Prospects

- Top donors and potential donors are connected
- Untapped potential for seven and eight-figure gifts from *new* donors
Outreach

- Existing fund raisers **must** increase their **major gift** outreach activity.
  - Time spent analysis
  - Cost per dollar raised

- Chancellor and deans must be prepared to spend 25%+ of their time on fund raising.
Next Steps...

- Present the Feasibility Study
- Fund raising priorities
- Volunteer infrastructure & recruitment
- Training program
- Implement internal readiness assessment recommendations