University of North Carolina Greensboro
Students First Campaign

2008–2009
Operational Plan
Executive Summary

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EXECUTIVE SUMMARY

Bentz Whaley Flessner was retained to facilitate an assessment and planning process focused on the University of North Carolina Greensboro’s (UNCG) current comprehensive Students First campaign. The following represents an executive summary of the full plan to follow.

Current Status

- The Students First Campaign, the Impact of One/the Power of Many, was launched in July 2004 and is scheduled to be a five-year campaign concluding in June 2009. The University is holding to this timeline for several important reasons outlined throughout this executive summary and the full plan.

- To date, the University has much to celebrate and to be proud of, given the success of the campaign to date and projections for its success going forward.
  - As of December 31, 2007, a total of $90,676,872 had been raised against the goal of $100 million.
  - A total of $34,104,197 has been secured in the form of planned gift commitments representing 37.6% of the total funds raised. The University is finalizing a cash flow model which will delineate pledge payment schedules associated with outright gifts and anticipated payouts associated with planned gifts as well.

- Of the fifteen units included in the campaign, a total of ten had either reached or exceeded their campaign targets.
  - The units having met their campaign goals have all identified important and ongoing philanthropic priorities for current and new programs as well as programs left under- or unfunded through existing campaign commitments.
  - The prevalence of planned gifts also strengthens the need and case for additional outright private support.
  - The existing portfolio of prospects includes many individuals with no current gift to the campaign and those who can be re-solicited to increase their commitments.

- The five units that have not yet reached their campaign targets have raised approximately half of their cumulative goals. If all units were to meet their campaign goals, the campaign target of $100 million would be oversubscribed by approximately $18 million. It is once again acknowledged that there is approximately eighteen months left in this campaign.

- The most significant area of need rests with the university-wide category (referred to as University Administration in campaign reports) with $23.56 million required to make goal. With only 39.29% of the funds raised to date, complete fulfillment of the target would translate into oversubscription of the $100 million campaign goal by more than $14 million.
As detailed in the full plan, the category of University Administration is defined by a broad and diverse array of programs and philanthropic priorities. This area represents perhaps one of the most significant questions as to future campaign design and execution given staffing models in advancement, and current and prospective prospect and donor affinities.

The “unit” is also challenged by several dynamics including its relationship to the decentralized model of unit-based fund-raising and the lack of dedicated staffing for the Associate Provosts for Research and Public/Private Sector Partnerships, International Programs, and Undergraduate Education.

The most significant need in this cohort of funding priorities is within University scholarships given that only 30% has been raised to date. With the absence of a specific brand for these funds and the reality of prospect and donor relationships with the units, it is unlikely that this target will be achieved given its current and more generic definition.

One possibility would be to focus leadership level annual giving solicitations for alumni scholarships and possibly special gift solicitations on this objective.

Another option would be to reallocate this funding objective within the units and use the increase in their targets to bridge fund-raising beyond this campaign and also to incorporate graduate support objectives within these aspirations. Reallocation to the units could also be a strategy for academic program support for both existing and future gifts.

Defining Campaign Success

The following is a summary of the key success factors which have individually and collectively influenced the full operational plan for UNCG’s campaign.

Financial Objectives

- Reaching and exceeding the overall financial target.
- Reaching individual unit targets and targets within units.
- Increasing the number of first-time and increased gifts at all levels of the gift pyramid.
- Advancing the percentage of outright gifts.
- Achieving 100% participation from all volunteers (campaign and advisory).
- Providing many opportunities for “everyone” to participate especially through annual and special gifts efforts.
- Expanding the base of gifts from corporations and foundations.
- Closing on all open solicitations.
- Formalizing outstanding gift agreements and pledge fulfillment plans.
- Turning effective stewardship into opportunities for second asks.
- Defining detailed University and unit level recognition plans to position future gifts.
Ownership Objectives

- Increasing opportunities for volunteer engagement.
- Providing for strategic evolution of existing campaign committees as bridge from this campaign to the next.
- Expanding the number of faculty and staff partners engaged in prospect development.
- Increasing the overall percentages of alumni and friends who give and work.
- Increasing the number of qualified prospects for first-time and increased gifts.
- Anticipating the role of key institutional volunteer leaders in this and future campaigns.
- Implementing an organized program to recognize internal partners and external volunteers.
- Providing an opportunity for UNCG students to participate in the campaign.

Institutional Objectives

- Defining the relationships between the programs and philanthropic aspirations unstaffed and staffed by Advancement and represented by the Chancellor, Provost, and areas such as the Graduate School, Student Affairs, the Office of Undergraduate Education, Research and Public/Private Sector Partnerships, and International Education and the unit staff and efforts.
- Establishing and prioritizing the facilities inventory and assessing the potential associated with private sources of support.
- Promoting the capacity of the University Libraries, Athletics, and the Weatherspoon Art Museum as community assets.
- Positioning the impact of the University and its schools on the region and the state.
- Advancing the identity, importance, and funding requirements associated with graduate level programs and faculty especially relevant given the classification of UNCG as a research university with “high research activity.”
- Evolving donor interests in faculty support and graduate fellowships.
• Capacity Building Objectives
  – Building a stronger understanding of the role of philanthropy.
  – Positioning and pre-selling the future agenda for philanthropy at institutional and unit levels.
  – Increasing awareness and pride in UNCG.
  – Positioning the work of alumni relations in prospect identification and cultivation.
  – Enhancing the database.
  – Evolving and integrating the development, alumni relations and university relations staff and programs