Southern/North Central Region Joint APS Staff Workshop  
May 20, 2008 @ 10:45, Tally Student Center – Walnut Room

DEVELOPMENT: FUNDRAISING AND FRIEND RAISING  
SESSION AGENDA

Keith Oakley: Executive Director of College Advancement and President of the North Carolina Agricultural Foundation  
- Welcome & Introductions: Keith Oakley, Scott Troutman, Anne Porter, Pam Warrick, and Mary Elizabeth Brake (scribe for this session)
- Fundraising, development, and Alumni relations at your University
- Brief overview of funding challenges facing Universities today
- CALS College Advancement Organization Chart
- Fundraising & Friend-raising: How they work together

Scott Troutman: Executive Director of the CALS Alumni & Friends Society  
- “Circle of Life” – How Alumni Relations, Development, Donor Relations, and Academic Programs are all interconnected
- Events, Partnerships, and Opportunities: CALS Tailgate; Distinguished Alumni Awards; Speed Networking event; CALS Retiree events; Life Sciences events; and more!

Anne Porter: Director of Development for Academic Programs  
Pam Warrick: CALS Student Services Manager II  
- A brief overview of fundraising and development role in Academic Program
- Scholarship Endowments
  o General comments of why they are important
  o Examples of various MOUs
  o Examples of the Carm Parkhurst Endowment and the Rhodes Graduate Education Endowment
  o Endowment signing ceremony and their importance
- Annual Donor Recognition event: Importance for stewardship and cultivation
- Academic Programs Student Services Manager (Pam Warrick) and the partnership role with Advancement
  o Coordination of thank-you/stewardship letters from the student recipients to donors
  o Coordination of student recipients for participation at the annual Donor Recognition event
  o Other communication and information disseminated to Advancement team
- Examples of fundraising projects specific to Academic Programs and student services
  o CALS Ambassador’s National Conference: Sponsorship solicitation
  o CALS Agri-Life Council: “Fundraising 101” and Masquerade Ball fundraiser event
  o Career Services “Kick Start” sponsorship solicitation
- On-line giving: Opportunities and challenges
- Student development awards (NC Agricultural Foundation’s Outstanding Student Organization Fundraising Award)

Keith Oakley & All:  
- Questions and Answers for final 20 minutes of session

Handouts:
(Samples of these can also be found on our Web site)  
1) CALS Advancement Organizational Chart  
2) CALS A&FS: brochure and event information  
3) Fundraising 101 & Fundraising for your clubs flyers  
4) Sample sponsorship solicitation materials  
5) Sample Endowment MOU and signing ceremony program  
6) Sample “Endowments Make A Difference” brochure  
7) CALS Donor Recognition Program  
8) CALS Advancement Web site info
NOTES FROM SESSION:

1) Anne Porter, Development Director of Academic Programs, opened the session by welcoming everyone. Then she outlined the packet materials (included) and introduced the NC State University CALS Academic Programs and Advancement staff present at the session.

2) Keith Oakley, Director of CALS Advancement and NC Agricultural Foundation president, was unable to attend, so Anne gave a brief overview of the topics he would have discussed noting that in 2000 the CALS development office moved from a development organization model to the current advancement model now in place. This model includes development, CALS alumni & friends and college relations (PR branch).

3) Anne polled the group regarding their interaction (if any) with their College and University Advancement/Development staff. *(There was a wide range of answers from frequent utilization to almost none.)*

4) Scott Troutman, Director of CALS Alumni & Friends, addressed the group about the role alumni & friends play in the cycle of development.
   a. He stressed the importance of involving students in the many functions the alumni & friends office coordinates such as Tailgate, the college’s largest single event and the largest alumni event on campus attracting between 1500-1800 people each fall prior to a football game.
   b. He stressed the importance of making it easy and attractive for student clubs to participate. Many times alumni have walked by student club booths at the event that led to further engagement with the College including monetary gifts.
   c. He highlighted the career services speed networking event that engages both students and industry representatives from fields such as medical, allied health, sales and marketing and veterinary medicine.
   d. He spoke about CALS Alumni awards and how recognizing alumni for past contributions can lead to future gifts of time/money.
   e. He pointed out the importance of faculty and staff retirees to the college’s fundraising and friend-raising efforts because they already care about faculty and staff at the University; they have time and resources and promote the history of the University. Most importantly, retirees understand the need of fundraising. Scott said CALS A&F host a retiree lunch each December as well as send a paper newsletter to retired faculty and staff twice a year to keep them in touch. Lastly, Scott spoke about holding regional events to further engage alumni and professionals with the University.

5) Scott then turned the session over to Anne Porter who discussed her role as Development Officer for Academic Programs. Anne attends all academic program senior staff meetings and acts as a liaison for the Advancement/Academic Programs offices.

6) Anne stressed the importance and value of building relationships which many times lead to creating scholarship endowments and for sponsorships of various academic programs.
   a. Carmen R. "Carm" Parkhurst Poultry Science Teaching Program Endowment as an example of a successful endowment benefiting academic programs.
   b. Anne discussed the Rhodes Endowment and gave included memorandum of understanding sample documents, stating that the memorandum of understanding is not a legal binding agreement but a vehicle in which the donor’s wishes are stated. She also gave examples of the Endowment signing ceremony and follow-up stewardship of donor.

7) Anne then discussed engaging donors and scholarship recipients through NC State University/College of Agriculture and Life Sciences donor gala.

8) At this point, she turned the session over to Pam Warrick who handles the nuts and bolts of CALS scholarships, making sure that faculty follow the various memoranda of understanding guidelines. Pam is also responsible for notifying scholarship recipients of their award, filling them in about the donor, who to send a thank you notes to, and the requirements of attending the annual donor gala.
9) Anne resumed discussing further development efforts such as the:
   a. Academics Champions Club (Creating legacy gifts by engaging past recipients and alums)
   b. Agri-Life Council (The student organization’s new fundraising event: The Masquerade Ball; Fundraising 101 handouts)
   c. CALS Ambassadors (Sponsorship opportunities for the NAAC and beyond)
   d. CALS Career Services Kick Start (Sponsorship opportunities and resources)

**OTHER: Questions & Answers From Session Participants:**

In reference to speed networking event:

Are our students prepped prior to attending event?

No. They were given a packet of information when they signed up for the event at the Academics Program office.

Some colleges mandate students attend an orientation prior to participating in a Speed Networking event.

In reference to endowments/MOUs:

Is there a minimum to fund?

Yes, three to five years, and NCSU policy a minimum of $15K. (Answered varied for other Universities)

In reference to donor information:

Do you share donor names and addresses with scholarship recipients?

Yes.

One university noted that they funnel all thank you notes through their academic programs office to ensure they are done. It is also a requirement for students if they want to receive the scholarship in the future.

Another great idea that was shared – they hold a mandatory letter writing class, where the student learns to write a property thank you letter. It is addressed and mailed directly to the donor.

In reference to donor gala:

How do you get students to attend the donor gala?

It is a requirement upon accepting the scholarship. (It was noted that some Universities cannot get student to attend such an event and therefore they do not hold a donor gala to avoid embarrassment. Other Universities have various conditions for student involvement with donors.)

**CALS ADVANCEMENT: Contact Information**

*Please call upon us if you have any questions, and please visit our Web site: www.cals.ncsu.edu/advancement*

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