University Advancement

**Increase private investment in Northern Kentucky University.**

<table>
<thead>
<tr>
<th>458</th>
<th>Develop university-wide fundraising priorities in alignment with NKU strategic and implementation plans.</th>
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<tr>
<th>2015-16 Progress Narrative</th>
<th>Not Started</th>
<th>Under Way</th>
<th>Completed</th>
<th>Ongoing</th>
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458.01-03. DAR- All Deans in conjunction with Provost, President and fundraising staff have submitted fundraising priorities for respective units. These priorities are being shared with external constituents through feasibility study. The priorities will be reviewed and revised based on feedback from feasibility study. Feasibilty study currently being finalized that will provide feedback from external constituents.

458.04-06 DAR- Currently working with facilities and academic leadership to finalize naming for HIC. Those guidelines will be used university wide. Donor relations has begun naming audit.

458.07- Annual goals for each fundraising unit have been confirmed for FY 17.

458.08- Hired a Coordinator of Strategic Initiatives to work closely with M&C to ensure giving messages exist in external communications. Giving links were added to electronic communication and in alumni magazine. Currently creating adaptable take along materials for fundraising team.

458.05 Donor Relations: A campus audit of all named spaces has been completed. Am working with Campus Planning, President's Office, and Naming Committee to identify when the naming occurred and what purpose does the name serve (i.e. gift recognition, recognition for service to the university, memorial recognition, etc.)

458.07 Adv. Services: Prospect capacity charts by college were developed for each of the colleges by major gift capacity ranges beginning at $25K; three year fundraising averages by annual giving/major giving by college were developed for use in informing fundraising goals.

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<tr>
<th>458</th>
<th>Create training and discussion opportunities to work with deans, faculty, staff and development officers to develop funding priorities.</th>
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<tbody>
<tr>
<td>458</td>
<td>Gather feedback from external constituents on priorities.</td>
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<td>458</td>
<td>Finalize priorities with President and Provost.</td>
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<tr>
<td>458</td>
<td>Develop university naming guidelines and endowment minimums in coordination with fundraising priorities.</td>
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Wednesday, July 13, 2016
Conduct facility naming audit.

Develop naming guidelines and policies for physical space, colleges, departments, centers, institutes, and programs.

Develop annual fundraising goals for each unit based on current prospect capacity data, three year rolling averages, and unit priorities.

Align and enhance all external communications to capture philanthropic priorities and impact of giving to the greater community.

Assess fundraising capacity through benchmarking and other analysis. Make investments as necessary to reach goals.

2015-16 Progress Narrative

459.01-05- DAR- We have created and hired two assistant directors of development with a focus on the discovery of new prospects; Hired a new Director of Annual Giving to focus on growing our alumni donor pipeline - including strategies for donor acquisition, donor retention and increasing our average annual gift. We have created and hired a Coordinator for Strategic Initiatives- whose role is to develop external communications, coordinate with colleagues across campus on giving messages, manage the timelines and project coordination for events/communications etc; Major gift team have been part of a planned giving training and a solicitation role play training. We are planning another benchmarking site visit for late 2016. All fundraising staff have performance metrics which include visits, qualification of new prospects, and dollar goals. Those metrics are tracked in weekly meetings. A monthly update on dollars raised and gift officer visits are shared with Deans/Directors and other Academic leadership monthly.

459.03: New major gift officer hires included: Director of Development, College of Health Professions, and Director of Development, Haile/US Bank College of Business, January 2016; Assistant Directors of Development (2) March and June, 2016, Director Annual Giving, February 2016. New support positions included: Dir. Strategic Initiatives, November 2015; Coordinator, Donor Relations, August 2015.

459.04: Advancement Services support staff participated in extensive online training sessions related to migration of information database to cloud servers and planning for conversion to Raiser’s Edge NXT upgrade. The NXT upgrade is planned for the 1st quarter of FY17 and will display work center information for gift officers to facilitate better management of their gift prospects.

459.06: To date, 27 online giving pages are active. As the web re-design project moves forward, external resources will be explored to enhance online giving sites to accommodate multiple mobile devices.
459.01 Develop and implement a structure to support the increased need for private support.
459.02 Develop potential funding models to support investments.
459.03 Recruit and hire top talent for units with fundraising capacity.
459.04 Provide resources including ongoing training and professional development opportunities for all fundraising staff.
459.05 Develop performance metrics for evaluation and accountability for development staff.
459.06 Increase our annual donor base by enhancing our giving resources tools (mobile giving, pay pal etc.).

### 460 Work closely with Advancement Services, Alumni Programs and other university leadership to increase prospect pool and create efficiencies in reporting and prospect management tools.

#### 2015-16 Progress Narrative

460.01 DAR- prospect research team meets monthly with assigned gift officers. Prospect researchers have been sharing suspects in groups of 10-20 and providing a 30 day time frame for gift officers to follow up and determine prospect.
460.02 We have involved faculty in alumni receptions and corporate events throughout the year.
460.03 With staffing and volunteer changes in Alumni Programs we are reviewing all events and assessing effectiveness to determine if they will continue.

460.01 and 460.02: Through May, 2016, 362 new major gift suspects were identified by the research team and 576 bios and alerts were distributed to fundraising staff.

460.04: New gift officers were trained in the prospect management guide and corresponding data entry requirements to maintain the prospect management system. With the implementation of Raiser's Edge NXT fundraiser view, key data to inform movement of prospects through to gift receipt will be much more transparent.

460.01 In collaboration with Advancement Services, utilize data analytics to grow pipeline and develop new tools to proactively identify new prospects.
460.02 Provide faculty and staff the resources to share leads and make introductions to alumni and potential prospects; create recognition opportunities for the faculty and staff that participate.
460.03 Align alumni events and resources to best identify new prospects for development staff.
460.04 Develop a collaborative and effective prospect management system that coordinates efforts and promotes donor engagement throughout the university.
### 461 Plan and implement a fundraising campaign focused on capacity building and meeting priorities established in division and unit strategic plans.

**2015-16 Progress Narrative**

- **461.01:** Data extracts and information survey responses were completed and shared with the university's campaign feasibility consultant.
- **461.02:** Conduct campaign feasibility study.
- **461.03:** Develop campaign timeline and goals.
- **461.04:** Launch the silent phase of a campaign.
- **461.05:** Launch the public phase of a campaign.

### 462 Develop and execute an integrated brand campaign that supports overall awareness, interest, trial, and perception of NKU.

**2015-16 Progress Narrative**

- **462.01:** This particular tactic has had a delayed start due to budget and resource allocation; however, it picked up steam in June 2016 and will continue into FY2017. A key list of high schools targeted for growth will be identified by Admissions and we will work with them to evaluate and track grassroots opportunities.

- **462.02**, **462.03**, **462.04** are all complete and will continue in FY2017.

- **462.01** Working with Enrollment Management and other university partners, create and implement an integrated marketing and communications strategy specific to high schools in targeted growth areas.
- **462.02** Utilize a media buying specialist or partner agency to evaluate and support strategic, targeted media buying with measurable outcomes and performance evaluation measurements.
- **462.03** Develop and implement a media flowchart that tracks, plans, and communicates the NKU advertising reach.
- **462.04** Increase online advertising reflective of the search trends of our target market.
Monitor and evaluate success and effectiveness of marketing plans and advertising campaigns against goals.

2015-16 Progress Narrative

463.01: In 2015-16, Google AdWords produced 279 "Visit NKU" completions, 752 quality phone calls (longer than :60 seconds), 23 Masters applications completed, and 63 undergraduate applications completed. Top performing key words include the words "visit", "tour", "admissions" used in conjunction with "NKU" and "Northern Kentucky University." These results are considerably higher than prior year.

In addition, our support of the Campus Recreation Center resulted in an ROI of $37,000 against a spend of $500 (social media advertising alone).

463.02: We continue to share our story through Marketing & Communications Collaborative meetings, presentations before Executive Team, Academic Affairs Council, NKU Foundation, a COB leadership meeting, and various other opportunities.

463.01 Develop and implement tools for measuring the success of our efforts.
463.02 Communicate regularly with the campus community regarding efforts and results.

464 Improve licensing partnership and opportunities.

2015-16 Progress Narrative

We have added another Rally House location (Florence Mall), in addition to Collegiate Tartan. We are also still pursuing Sports Depot (Newport).

464.01 Increase our retail presence by 5%.

465 Engage, educate, and inspire each constituent group, using the right message, for the right person, at the right time, to create ambassadors for NKU.

2015-16 Progress Narrative

We have made great strides in terms of internal communication procedures, including one campus calendar, ThisWeek, In The News and streamlining e-newsletters across the University.

465.01 Working in conjunction with other University departments, align and coordinate key messages and frequency of communication to alumni, donors, current and prospective students, parents, legislators and the general public.
Develop and implement a University Promise that is our intentional focus on how we want everyone – our students, alumni, donors, and each other – to feel, understanding that the experience people have with us is ultimately our brand.

2015-16 Progress Narrative

This has been introduced and incorporated into the New Employee Welcome. It is also used by the President and Provost during high visibility campus community speeches, including convocation.

466.01

Increase on campus exposure, measured by an increase in attendance at scheduled events.

2015-16 Progress Narrative

SOTA and athletics both increased attendance at their events this year. We also had several events that sold out (i.e. planetarium Valentine’s day event) and/or did better than last year (business week). We were highly involved with the successful Sam Quinones event, which produced better results than anticipated in terms of attendance and engagement.

467.01

Working with the appropriate program owners, develop, execute, and/or support an integrated marketing and communications plan to support attendance at various campus events, including (but not limited to): athletic, arts, and theatre events.

Build a culture of philanthropy at Northern Kentucky University.

468 Create an effective participatory model for development that includes training for all university faculty and staff.

2015-16 Progress Narrative

Host roundtables with University Leadership including Provost and Deans to discuss fundraising challenges, prospect strategy discussion, and assessment of program effectiveness.

468.02

Create resources for faculty chairs on fundraising (sample acknowledgements, case statements, questions to ask donors, building an effective prospect strategy).

468.03

Create opportunities for faculty and staff to engage prospects and donors with projects of interest.
Increase Faculty and Staff participation in the annual campus campaign.

2015-16 Progress Narrative

DAR - With the hire of a new Director of Annual Giving we are in the process of evaluating our F/S annual campus campaign process. Currently conducting benchmarking research with peer institutions. Planning to launch campus wide marketing in FY 17 to communicate impact of f/s giving and building a culture of philanthropy. Developing a plan to implement a "Day of Giving" to provide internal and external constituents and opportunity to support NKU. Previously, faculty and staff giving through payroll deductions ceased at the conclusion of a fiscal year. In 2015/16 we implemented ongoing payroll deductions for F/S donors that continue until the donor requests it to cease.

469.01 Engage more of the campus community through increased marketing on impact of giving.
469.02 Provide incentives across campus community.

Work closely with University Marketing and Communications to align giving messaging across University.

2015-16 Progress Narrative

DAR 470.01- Coordinator of Strategic Initiatives is working closely with M&C to add giving messaging where appropriate throughout campus publications. Examples include: enewsletters, NKU magazine, website updates to reflect more prominent giving, addition of stories in Inside NKU that reflect donor impact and highlight scholarship recipients.
470.02- Director of Annual giving and Coordinator of Strategic initiatives position are collaborating to increase awareness about crowdfunding projects (IMPACT NKU); working with M&C to make philanthropy messaging more prominent. Working closely with gift officers, M&C and Donor relations to highlight stories about the impact of giving in internal and external communication.
M+C 470.01: Giving messages have been added to the NKU magazine (both print and app versions).
470.01 Add giving message to all university publications.
470.02 Better communicate the impact of philanthropy across campus.

Increase student giving.

2015-16 Progress Narrative

Created more efficiencies with our Senior Challenge fundraising program. Create a parent giving program that is incorporated into the senior challenge. Exploring opportunities to provide incentives to participants to increase giving. Increase projects of crowdfunding platform (IMPACT NKU) to better align with student interest. Develop a strong marketing plan that will increase awareness and drive new revenue from students.
471.01 Work with Student Affairs and Academic Affairs to develop program opportunities to educate student population about the importance of philanthropy.
## Improve the effectiveness and efficiency of marketing and communications.

<table>
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<tr>
<th>472</th>
<th>Develop, present and implement a new department structure to support the rapidly changing needs of the University while being good stewards of our resources.</th>
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<td></td>
<td><strong>2015-16 Progress Narrative</strong></td>
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<td></td>
<td>The 2014-15 progress update indicated this item as completed. No additional narrative is required, but can be added at your discretion.</td>
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<td>472.01 Renovate and update the Marketing &amp; Communications space to accommodate growth and provide space for creativity and interaction.</td>
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<td>472.02 Provide tools, training, and development opportunities for all Marketing &amp; Communications staff.</td>
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<tr>
<th>473</th>
<th>Create alignment in messaging, visual identity and more.</th>
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<td><strong>2015-16 Progress Narrative</strong></td>
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<td>Visual and verbal identity guidelines have been rolled out and version 2.0 will be coming soon. Athletics guidelines were introduced during spring 2016.</td>
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<td>473.01 Convene a monthly meeting of the Marketing &amp; Communications Collaborative (MCC), a group made up of everyone at NKU that plays a role in Marketing &amp; Communications.</td>
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<td>473.02 Develop and implement visual and verbal guidelines that permeate throughout the University.</td>
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<td>473.03 Partner with external design agencies to accommodate overflow work.</td>
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<td>473.04 Provide training on social media, media relations, etc to the MCC group.</td>
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<td>473.05 Create an internal and external editorial calendar to allow for proactive planning for at least 70% of the Marketing &amp; Communications workload that supports the strategic plan.</td>
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<td>473.06 In partnership with Institutional Effectiveness and Human Resources, develop and execute a learning plan to educate and inspire each employee of the University on the Promise.</td>
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<tr>
<th>474</th>
<th>Clearly define and articulate the role of Marketing &amp; Communications.</th>
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<td><strong>2015-16 Progress Narrative</strong></td>
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<td>This effort is ongoing as we convene the Marketing &amp; Communications Collaborative and continue to introduce new (and easy) processes for interacting with our services.</td>
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<td>474.01 Communicate new structure and partnership with University leaders.</td>
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<td>474.02 Create a go-to manual to be housed online that clearly defines expectations, roles, and what support looks like for our various constituents.</td>
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</table>
474.03 Introduce and implement a standard Marketing & Communications plan template that addresses cross-functional responsibilities and departments all contributing to one project.

474.04 Develop and implement a regular communication with NKU news coverage for the prior period, as well as upcoming stories that are in the pipeline.

**Develop University policies for Marketing & Communications.**

2015-16 Progress Narrative

The Social Media policy/procedure and strategy was delayed due to outstanding questions requiring input from other departments. We hope to implement in 2016 (fall/winter).

475.02: This was delayed due to budget restrictions. It will occur in 2016-17.

475.01 Develop and implement photo/video release policies.

475.02 Develop and implement Media Relations policies and appropriate training for key leaders.

475.03 Develop, implement, and expand social media policies and guidelines, and offer appropriate training to University constituents as needed/warranted.

475.04 Develop and implement internal communications policies.

*Engage more individuals in opportunities that increase awareness of NKU, increases the need and impact for private support and/or create meaningf*
Better steward our donors through opportunities that demonstrate the impact their private investment has made at NKU.

2015-16 Progress Narrative

476.03- DAR- working closely to ensure impact is in annual endowment reports and comprehensive donor stewardship reports.

476.04 DAR- Working with Donor relations to evaluate and redefine giving levels and benefits for donor recognition societies. This includes creating new marketing materials and process that will develop affinity and retain donors. The assistant directors of development will provide one on one stewardship to current and new donors.

Donor Relations:
1. We’ve improved the scholarship thank you letter procedures including the collection of letters from recipients and the distribution of letters to donors. This year we will include recipients' contact information, if permission is provided at the time of scholarship acceptance, to encourage donor interaction with student recipients.
2. We’re working with Annual Fund Director to review and redefine the recognition societies to better define benefits for each group which will result in targeted stewardship efforts.
3.Identify experiences/events that will engage donors and alumni: We are revamping the annual THANKU event to target top donors at $10,000 plus lifetime giving levels. Will work with Annual Fund Director to identify an event/experience for the President’s Society and lifetime donors under the $10,000 threshold.

476.01: Reports detailing donors that support annual scholarships were developed to inform Donor Relations and guide annual communications regarding gifts to renew the scholarships and information that details the number of students impacted by donor-funded scholarships.

476.04: The university’s Heritage Society honoring donors who have or plan to make planned gifts was reviewed in detailed and changes made to membership tracking making these donors more transparent in Raiser’s Edge.

476.01 Donor Relations will work with Development and Advancement Services to annually identify groups of donors for targeted stewardship – identify specialized reports that guide decision making.

476.02 Donor Relations in coordination with University and academic leadership will identify annual opportunities to engage donors with areas that private support has made an impact and/or is critical to the growth and success of other programs.

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476.03 Donor Relations in collaboration with Development and Marketing and Communications will develop a suite of communication tools and opportunities to celebrate and recognize our donors and the impact of their investment.

476.04 Donor Relations in coordination with Development, Advancement Services, and academic leadership will assess and determine appropriate university giving recognition societies and implement those recommendations.

477 Create personalized engagement opportunities for alumni to support student success.

2015-16 Progress Narrative

477.02, 03- Restructured alumni awards to align with Homecoming activities and events. Began to brand as alumni weekend. Continue to focus on this event becoming a signature alumni association event. This year we utilized alumni donors for annual events such as ThankNKU week (provides mentoring opportunities for students), alumni participation in Business Week, alumni board were involved in awarding of scholarships for Paul J. Sipes University Award and alumni family scholarship. Our alumni councils hosted events such as Norse Dash and Black and Gold Safari which raised funds to support students at NKU. Recruited alumni to present at area high schools, created a Black Alumni Council, aligned Norse Notes with an alumni event to ensure alumni have personal connection with prospective students. Admissions and Graduate Programs are present at alumni and corporate engagement events to distribute information. Annual retreat for all alumni volunteers to train and develop plan for working with career services and admissions.

477.04- DAR Incorporated a hashtag of NKU alumni for use on Instagram and Twitter. Had over 200 people post on Instagram to share memories and photos from graduation. Creating more opportunities to interact with alumni through social media by providing "teasers" "giveaways" and "incentives".

477.04: The prospect research team is more fully utilizing information obtained from alumni who join the university's official LinkedIn group record. This information generally includes employment information, enabling the university to identify local employers who have a core group of NKU alumni employees. Alumni Programs continues to reach out to these employers as a strategy to re-engage them in the life of the university.

477.01 Organize alumni affairs to better support increased engagement and giving opportunities for alumni.

477.02 Work with Admissions and Enrollment Management to develop opportunities for alumni to support enrollment and retention.

477.03 Work with Career Services and identified academic units to create opportunities for alumni to support career readiness for students.
477.04 Collect social media information on alumni and donors for incorporation into communication strategies, as applicable/appropriate.

478 Increase and promote NKU pride for all stakeholders in order to develop loyalty, engagement and stewardship opportunities.

2015-16 Progress Narrative

478.01 We are introducing an NKU tartan, in addition to SpiritDays. We will also be updating the banners/elevators on campus during fall 2016.

478.01 Introduce NKU traditions, including new events such as: Founders' Day, Sibling Weekend, Professor Recognition, Reunions/Major Keynote Speaker

478.02 Develop and implement a strategy for incorporating the brand elements into the physical environment on campus.

479 Identify data maintained in other university information systems that relate to alumni, donor, and prospective donor engagement with the university (i.e., donors, alumni, employers, recruiters, ticket holders, vendors, parents).

2015-16 Progress Narrative

Collaboration with IT ongoing to identify student athlete participation by sport now being maintained in SAP so that it can be included in the NKU graduate file interface. Currently, this data came is generated from an athletics provided data file.

Collaboration is ongoing with IT to identify spouse and relationship information maintained in SAP student records so that an initial extract and then an ongoing interface can be developed for upload to Raiser's Edge.

Additional information systems other than SAP that include alumni/friend/donor information identified to date include: OrgSync (student engagement) and the NKU LinkedIn record.

479.01 Secure a list of third party information systems and a description of the data maintained in them from Information Technology.

479.02 Survey university departments to learn what data they maintain in Excel/Access and/or other information systems that relate to external constituents.

479.03 Compile a comprehensive listing of information systems on campus that relate to alumni, donor, and prospective donor engagement with the university.

479.04 Analyze data from other university information systems and determine those data elements that can be appropriately recorded in Raiser's Edge.
Develop a plan to prioritize, transfer and test the transfer of appropriate data from other university information systems to Raiser’s Edge on a regular basis.

2015-16 Progress Narrative

Advancement Services has regular processes and resources in place to maintain the integrity of contact information for constituents (alumni, donors, prospective donors, advocacy & engagement partners) enabling effective communication and engagement strategies to be implemented. During FY16, 5,753 constituent records were updated utilizing information from National Change of Address from US Postal Service; 5,014 constituent records were updated via a phone append service, and 6,191 searches to learn relationship and contact information were conducted using LexisNexis database search services.

During FY2016, Advancement Services staff facilitated the distribution of 224 electronic messages, an average of 4 per week, to targeted audiences (alumni, donor, prospective donors, advocacy and engagement partners) during FY2016.

Advancement Services continues to collaborate with IT to enhance student data transfer from SAP; the focus in FY16 has been on including relationship information, i.e., parent, spouse, athletic participation. Efforts had been underway to integrate WNKU donor records with Raiser's Edge however with a possible sale of the station further integration efforts have been put on hold.

480.01 Identify resources and processes needed to clean, match, transfer and test data conversion from other university information systems to fields in Raiser’s Edge.

480.02 Secure commitment from IT and other university departments to automate regular transfer of data from earmarked university information systems.

480.03 Identify resources and develop processes required to maintain data integrity of newly acquired information.