**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>
<th>Begin in 2014-15</th>
<th>5.2a</th>
</tr>
</thead>
</table>

### 2014-15 Progress Narrative

**458.01 - Dev & Alumni Relations:** We have begun the process of developing university wide fundraising priorities by engaging the Deans and other senior leadership in discussions about goals and priorities for their respective areas. We have conducted training to help our leadership through this process. We have raised our major gift level from $10,000 to $25,000 and have begun to establish university naming guidelines. We will meet with all Deans/Directors by August 15th to establish an annual goal for their respective area.

**458.01 - Adv. Services:** Comparison reports for FY13-15 detailing private gifts by college and prospect pools will be shared with each of the Deans in August 2015 preparation for assisting with development of fundraising priorities.

**458.04 - Adv. Services:** A university Gift Acceptance policy establishing suggested minimum endowment gift levels was adopted by the Board of Regents in March, 2015.

**458.01** Create training and discussion opportunities to work with deans, faculty, staff and development officers to develop funding priorities.

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □

**458.02** Gather feedback from external constituents on priorities.

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □

**458.03** Finalize priorities with President and Provost.

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □

**458.04** Develop university naming guidelines and endowment minimums in coordination with fundraising priorities.

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □

**458.05** Conduct facility naming audit.

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □

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

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □

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

- **Complete:** ✓
- **Not Started:** □
- **Under Way:** □
- **Completed:** □
- **Ongoing:** □
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.

2014-15 Progress Narrative

459.01; 459.04 - Dev & Alumni Relations: We integrated Alumni and Development through new management structure and moved our alumni staff to our central office. Alumni and Development work closely every day to achieve shared goals and establish better efficiencies in our work. We have solidified performance metrics to evaluate and hold gift officers accountable. We have invested in training for gift officers - Advancement resources, EAB, CASE webinars. We have hired 4 new positions: one in A&S; one in COEHS; one in COI and a discovery officer who is responsible for identifying new prospects.

459.04 - Adv. Services: An Advancement Services staff member attended the fall 2014 Blackbaud annual conference to learn about changes in the university's fundraising software. Other staff participated in numerous webinars re Raiser's Edge, OMatic, and ResearchPoint software, participated in EAB webinars and the university's online training sessions and the Strength Finding program.

459.05 - Adv. Services: Adv. Services developed database reports to track development metrics from the Raiser’s Edge System. In FY16, a new version of Raiser’s Edge will be implemented which will enable metrics to be displayed in dashboard views customized for end users.

459.06 - Adv. Services: Adv. Services staff developed multiple online giving and registration pages to facilitate alumni and development initiatives. A crowdfunding platform was adopted and implemented in FY2015. In FY2016, EFT transactions will be explored.

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.
Increase our annual donor base by enhancing our giving resources tools (mobile giving, PayPal etc.).

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

2014-15 Progress Narrative

460.01; 460.03 - Dev & Alumni Relations: We have begun to better integrate Alumni and Development by sharing our objectives, finding alignment & creating better engagement opportunities through central or college activities. We created a prospect management system and developed better reporting capabilities. All prospect researchers are meeting monthly with assigned gift officers.

460.01 - Adv. Services: Prospect Analysts have developed major gift suspect lists of @ 100 constituents for each of the colleges based on wealth capacity ratings and affinity to NKU scores. The analyst developed the affinity score models from engagement data tracked in Raiser's Edge. These ratings and scores have been added to Raiser's Edge for ease of access by gift officers. Prospect analyst meet with gift officers are on a regular basis to review their prospect research needs.

460.02 - Adv. Services: Prospect Analysts prepare weekly action reports and alerts re NKU alumni and donor and distribute to gift officers. Spreadsheets of relevant data pulled from Raiser’s Edge are shared with university leadership and gift officers prior to alumni/donor engagement activities.

460.03 - Adv. Services: Data pulled routinely upon request to inform prospect potential of draft event invitation lists.

460.04 - Adv. Services: The Raiser's Edge database was configured to meet Development's prospect management information needs. The Prospect Management Guideline was significantly revised in June to align with current fundraising processes and information needs.

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.
Develop a collaborative and effective prospect management system that coordinates efforts and promotes donor engagement throughout the university.

*Increase awareness of NKU and become a top brand in the region.*

### 2014-15 Progress Narrative

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

**Begin in 2014-15**

**5.5a**

<table>
<thead>
<tr>
<th>2014-15</th>
<th>Progress Narrative</th>
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</thead>
<tbody>
<tr>
<td><strong>Not Started</strong></td>
<td><strong>Under Way</strong></td>
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<tr>
<td>□</td>
<td>✓</td>
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</table>

**M+C:** The spring campaign supported undergraduate and graduate yield. It introduced a digital advertising presence we had not previously had. We will measure our results through a research study performed later this year. The 2015-16 campaign will be a new approach for NKU by focusing on digital and outdoor, using creative, relevant messaging to drive results.

**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.

**Not Started**

**Under Way**

**Completed**

**Not Started**

**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.

**Not Started**

**Under Way**

**Completed**

**Not Started**

**462.03** Develop and implement a media flowchart that tracks, plans, and communicates the NKU advertising reach.

**Not Started**

**Under Way**

**Completed**

**Not Started**

**462.04** Increase online advertising reflective of the search trends of our target market.

**Not Started**

**Under Way**

**Completed**

**Not Started**

### 2014-15 Progress Narrative

**463.01** Develop and implement tools for measuring the success of our efforts.

**Not Started**

**Under Way**

**Completed**

**Not Started**

**463.02** Communicate regularly with the campus community regarding efforts and results.

**Not Started**

**Under Way**

**Completed**

**Not Started**

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Friday, August 21, 2015
### Improve licensing partnership and opportunities.

2014-15 Progress Narrative
- M+C: Three new locations/businesses have agreed to place their first orders (Rally House in Crestview Hills, Walgreens on Alexandria Pike, and CVG).

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<thead>
<tr>
<th>Task ID</th>
<th>Description</th>
<th>Status</th>
<th>Notes</th>
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<tbody>
<tr>
<td>464.01</td>
<td>Increase our retail presence by 5%</td>
<td>-</td>
<td></td>
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</table>

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

2014-15 Progress Narrative
- M+C: An initial presentation outlining this effort was shared at the Marketing & Communications Collaborative in June. We have also introduced and are executing a Presidential communications plan that supports this effort.

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<tbody>
<tr>
<td>465.01</td>
<td>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.</td>
<td>-</td>
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</tr>
</tbody>
</table>

### 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.

2014-15 Progress Narrative
- M+C: This has been both developed and introduced. It was introduced at the January 2015 convocation and it was reviewed again at the Staff Development Day event in June 2015. It will be incorporated into the New Employee Welcome event.

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<tbody>
<tr>
<td>466.01</td>
<td>Increase on campus exposure, measured by an increase in attendance at scheduled events.</td>
<td>-</td>
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</table>

2014-15 Progress Narrative
- M+C: We are creating a one-stop calendar for the University which should help this effort dramatically. Our marketing managers are also becoming part of the event creation/promotion process within their colleges and we'll be able to influence these decisions and their outcomes.
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.**

### 469 Increase Faculty and Staff participation in the annual campus campaign.

**2014-15 Progress Narrative**

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

**2014-15 Progress Narrative**

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

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

**2014-15 Progress Narrative**

- **470.01** Add giving message to all university publications.
- **470.02** Better communicate the impact of philanthropy across campus.

### 471 Increase student giving.

**2014-15 Progress Narrative**

- **471.01** Work with Student Affairs and Academic Affairs to develop program opportunities to educate student population about the importance of philanthropy.

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**Improve the effectiveness and efficiency of marketing and communications.**
Develop, present and implement a new department structure to support the rapidly changing needs of the University while being good stewards of our resources.

### 2014-15 Progress Narrative

**472.01 - M+C**
The restructure process is complete. We continue to seek ways to provide tools, training and development opportunities for the Marketing & Communications staff. The department renovation is scheduled to begin in August 2015.

**472.02**
Renovate and update the Marketing & Communications space to accommodate growth and provide space for creativity and interaction.

**472.03**
Provide tools, training, and development opportunities for all Marketing & Communications staff.

### 2014-15 Progress Narrative

**473**
Create alignment in messaging, visual identity and more.

**473.01**
Convene a monthly meeting of the Marketing & Communications Collaborative (MCC), a group made up of everyone at NKU that plays a role in Marketing & Communications.

**473.02**
Develop and implement visual and verbal guidelines that permeate throughout the University.

**473.03**
Partner with external design agencies to accommodate overflow work.

**473.04**
Provide training on social media, media relations, etc to the MCC group.

**473.05**
Create an internal and external editorial calendar to allow for proactive planning for at least 70% of the Marketing & Communications workload that supports the strategic plan.

**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.
Clearly define and articulate the role of Marketing & Communications.

2014-15 Progress Narrative

M+C: Meetings with leadership of each college and functional area have been held to discuss changes within Marketing & Communications. Information on the Mar Comm website will be updated / created that will help clarify roles and support for our partners across campus. A standard template is being used for marketing and communications plans. "NKU In the News" launched in July 2015 and is sent each Friday.

474.01 Communicate new structure and partnership with University leaders.

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.

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.

2014-15 Progress Narrative

M+C: Photo/video release policies are being updated now with input from legal. Media Relations policies are being created and training is being planned. Social media strategy is being pulled together now, in conjunction with (internal and external) communications leaders.

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 meaningful opportunities to improve student success.
Better steward our donors through opportunities that demonstrate the impact their private investment has made at NKU.

2014-15 Progress Narrative

476.01 - Adv. Services: Adv. Services tracks several donor groups who have been targeted for stewardship: President's Society, Heritage Society, Loyal Donors, Go Norse athletic donors. The count and demographics of each group helps inform stewardship strategies.

476.04 - Adv. Services: Reports detailing donors based upon the university's current giving societies is pulled each year; additional reporting is available to inform emerging donor groups for recognition/stewardship.

Donor Relations: In the process of:
Improving the scholarship thank you letter procedures including the collection of letters from recipients and the distribution of letters to donors.
Working with Marketing + Communications to improve the lifetime donor impact reports incorporating university branding.
Reviewing and redefining the recognition societies to better define benefits for each group which will result in targeted stewardship efforts.
Identifying experiences/events that will engage donors and alumni.

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.

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.

2014-15 Progress Narrative

Dev & Alumni Relations: We are conducting a volunteer retreat for all 100 members of our alumni boards and councils. This retreat will better train, communicate and engage our volunteers in NKU's mission and strategic goals. We will have a second Director of Engagement to help in this endeavor of alumni engagement.

477.04 - Adv. Services: Adv. Services maintains email addresses for alumni and donors. An annual service and continual updates based on email responses are used to maintain accuracy of the contact information.

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.

2014-15 Progress Narrative

Marketing & Communications has assumed responsibility for creative on banners, elevators, kiosks and most digital signs. We have partnered with the city of Highland Heights to post exterior banners for NKU in high traffic areas. We are working our plan to “norseify” area businesses and have seen early success (Skyline Tavern). Much of this work will be done in 2015-16.

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.
Expand and increase the Raiser’s Edge and its ability to provide comprehensive information on external constituents for effective decision making for the university.

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).

### 2014-15 Progress Narrative

Adv. Services: To date, Advancement Services has identified seven significant information systems that track information on alumni and donors. These include: Norse Athletics, Parents Association, WNKU, Campus Recreation, Fine Arts ticketing, University Connections, and Career Services. Numerous academic departments maintain spreadsheets of their alumni. Parent Association and Norse Athletic data have been analyzed in detail.

<table>
<thead>
<tr>
<th>Task</th>
<th>Not Started</th>
<th>Under Way</th>
<th>Completed</th>
<th>Ongoing</th>
</tr>
</thead>
<tbody>
<tr>
<td>479.01 Secure a list of third party information systems and a description of the data maintained in them from Information Technology.</td>
<td></td>
<td>✓</td>
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</tr>
<tr>
<td>479.02 Survey university departments to learn what data they maintain in Excel/Access and/or other information systems that relate to external constituents.</td>
<td></td>
<td>✓</td>
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</tr>
<tr>
<td>479.03 Compile a comprehensive listing of information systems on campus that relate to alumni, donor, and prospective donor engagement with the university.</td>
<td>✓</td>
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<tr>
<td>479.04 Analyze data from other university information systems and determine those data elements that can be appropriately recorded in Raiser’s Edge.</td>
<td></td>
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</tr>
</tbody>
</table>
### 2014-15 Progress Narrative

Adv. Services: NKU Parent Association information has been uploaded into Raiser's Edge. NKU Parent Association staff provide updates of new members. Collaboration is ongoing with Adv. Services' business system analyst to improve the accuracy and maintenance of this data by those inputting the data.

Adv. Services: A significant number of athletic parents and former athletes has been analyzed and uploaded into Raiser's Edge. Ongoing effort is required to understand parent/athlete relationships before this information can be uploaded.

Strategies for efficient data transfers of Athletic data continue to be explored using SAP and NCAA information systems.

### Tasks

<table>
<thead>
<tr>
<th>Task ID</th>
<th>Description</th>
<th>Status 1</th>
<th>Status 2</th>
<th>Status 3</th>
<th>Status 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>480.01</td>
<td>Identify resources and processes needed to clean, match, transfer and test data conversion from other university information systems to fields in Raiser’s Edge.</td>
<td>□</td>
<td>✓</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>480.02</td>
<td>Secure commitment from IT and other university departments to automate regular transfer of data from earmarked university information systems.</td>
<td>✓</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>480.03</td>
<td>Identify resources and develop processes required to maintain data integrity of newly acquired information.</td>
<td>□</td>
<td>✓</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>