Division of University Advancement
University of South Carolina

Blueprint for Service Excellence
Fiscal Year 2009-2010

April 3, 2009
I. Vision, Mission and Goals

A. Executive Summary

Blueprint for Service Excellence 2009-2010

VISION

The Division of University Advancement will be recognized as a national leader in effective institutional advancement as a result of increased private commitment and investment in the University, and by our success in helping to motivate outstanding students, faculty and staff to bring their talents to the University.

MISSION

The mission of the Division is to increase understanding and support for the University in order to help attract excellent students and faculty, improve program quality and academic reputations, and advance research and scholarly productivity by executing high quality marketing, communications, alumni, and fundraising programs.

GOALS

1. Increase philanthropic support for the University.
2. Improve the reputation and visibility of the University.
3. Ensure that alumni are informed, involved and committed to the success of the University.
4. Refine and improve administrative programs and processes with respect to operational services for internal and external stakeholders.
B. Goals, Initiatives and Action Plans

In view of the mission stated above, the following goals are adopted.

Goal 1. Increase philanthropic support for the University.

Initiative: 1 (a) Raise $100 million in production (gifts and new pledges).

Craft strategies with deans, faculty, directors of development (DODs) and volunteers to solicit gifts from alumni, parents, friends, corporations and foundations. Recruit and retain professional fundraising staff and conduct training sessions for deans, vice presidents and DODs. Increase private support through major gift programs, annual giving programs and gift planning programs.

Goal 2. Improve the reputation and visibility of the University.

Initiative: 2 (a) Enhance multimedia production capability for Division of University Advancement in order to better motivate audiences and position the University as an innovative, progressive institution.

Increase the number of videos and multimedia creations such as Flash and animation to support Advancement including donor recognition, presidential events, fundraising and advertising.

Initiative: 2 (b) Provide more avenues for delivering insightful and consistent messages on University initiatives and successes.

Create a formal University Speakers Program. Create a PowerPoint design template for speeches with slides containing overview, key hallmarks, images and multimedia of the University. Offices of Alumni, Development, Media Relations, and the University Provost will develop program to identify exceptional public speakers and presenters with coordinated University messages delivered before strategically targeted audiences.
**Initiative: 2 (c)** Strategic enhancement of University Web presence in order to market the University clearly and dynamically. Research needs and refine Web presence in order to remain competitive with other universities.

Conduct survey/focus group research and usability/compatibility testing on current site and develop new design/content for main pages. Redesign main Web pages to accommodate more dynamic marketing content, and develop content management database to improve content delivery and save time. Work with enrollment management to integrate pages and coordinate recruitment messages and content. Increase the amount of video available to visitors on the University Web site.

**Initiative: 2 (d)** Increase exposure of the University and its programs and services via regional and national news outlets.

Expand media relations visits and contacts with out-of-state news organizations, particularly with reporters covering strength areas at the University such as student experience/success, international business, health sciences and alternative energy research. Build upon successful Op-Ed placement strategy for state and regional media, increasing placements of columns about key issues by authors that convey University strengths and needs within a locally relevant frame.

**Initiative: 2 (e)** Position Marketing and Communications for strategic and support role in ongoing fundraising efforts, and with potential upcoming capital campaign.

Support University fundraising efforts through targeted and innovative communications/marketing. University Marketing and Communications will develop creative ways – through Web, multimedia pieces, print, speeches, media, advertising – to communicate to current and prospective donors about the critical importance of philanthropy and giving to the University. Strategies and tactics will center on showing the outcomes of giving (students, programs, facilities), why individuals give, increasing the philanthropy “IQ” of faculty, staff, alumni and friends about how essential giving is to the success of the University, and recognizing and thanking donors for their commitment and passion.

**Initiative: 2 (f)** Accelerate and expand state and national advertising/marketing to increase awareness and elevate stature among academic audience, foundations, donors and media, and help recruitment of top students and faculty.

Continue current Web/print/e-mail advertising campaigns and assess effectiveness, and plan, negotiate and execute further image building ad campaigns with the Chronicle of Higher Education, NPR, Inside Higher Education and other key publications/audiences.
**Initiative: 2 (a)** Develop research-based marketing and branding strategies to define and vividly describe the brand values and position of the University.

Regularly employ research methods to assess market, define competing interests, create differentiated products/messages and convey them to audiences in consistent ways that position the University as innovative, exciting and prestigious, and motivate action. Create consistent, integrated marketing initiatives.

**Initiative: 2 (h)** Increase in-house marketing of four-color printing now available through University Printing Services.

Offer new services to the University community as a result of the purchase of the new state-of-the-art, four-color press.

**Initiative: 2 (i)** Continue crisis communications planning.

Work with HR, IT, Student Affairs, and Communications and Marketing staff and develop draft of crisis communications plan that will support the work of the University's Preparedness Committee. Increase collaboration among communications professionals and understanding of who does what in a crisis, and increase the clarity and effectiveness of communication methods and materials during a crisis.

**Initiative: 2 (j)** Continue marketing and communications support and increased coordination for University Research and Health Sciences communications, as well as, Innovista marketing, and align communications with expanded state and national image building.

Work closely with Research and Innovista areas to identify and strategically market research and private tenant announcements, news. Employ various ways to communicate growth in research, how it impacts society, and the new urbanism design, lifestyle and opportunities of Innovista.

NOTE: 2 new indicators in addition to these have been added at the end.
Goal 3. Ensure that alumni are informed, involved and committed to the success of the University.

<table>
<thead>
<tr>
<th>Initiative: 3(a)</th>
<th>Create a visible symbol of the vital role alumni play in the life of the institution by furthering plans for the Alumni Center. Continue to secure private funds and to seek funding partnerships for the Alumni Center.</th>
</tr>
</thead>
</table>

See attached: architect’s renderings, site plan, space program and cost estimates.

<table>
<thead>
<tr>
<th>Initiative: 3(b)</th>
<th>Conduct Board-level strategic planning aimed at potentially “reinventing” the Alumni Association in light of changed revenue expectations.</th>
</tr>
</thead>
</table>

Examine all ongoing programs for ROO (return on objective). Re-focus effort in infrastructure to achieve maximum efficiencies and provide excellent customer service. Retaining members to be a critical objective for the foreseeable future.

<table>
<thead>
<tr>
<th>Initiative: 3(c)</th>
<th>Continue “Join Up” campaign, seeking 40,000 total members by December 31, 2010. Increase retention of annual members from 65 to 70 percent.</th>
</tr>
</thead>
</table>

Refine measurement of member retention expense to enable targeting of highest results for lowest cost. Continue to reinforce membership value. Continue to survey members about their interests and needs.

<table>
<thead>
<tr>
<th>Initiative: 3(d)</th>
<th>Continue to seek ways to engage in partnership with Development to reinforce the institution’s fund raising objectives and to stress philanthropy in all Association activities programs.</th>
</tr>
</thead>
</table>

Continue to work with Annual Giving to create a national arm of the Young Alumni Council that will increase the engagement of this critical group and strengthen their awareness and support of philanthropy. Continue to seek class gifts from every reunioning class, and continue to support the Senior Class Gift. Continue to work with the Schools and Colleges to enhance their programming for alumni while achieving maximum cost containment through co-programming. Continue to work with Athletics to support all teams and programs and to maximize membership in both the Association and the Gamecock Club.
**Initiative: 3 (e)** Maximize partnership opportunities with vendors and affinity relationships to increase resources available for association priorities.

Secure sponsorship revenue or trade for services to underwrite 25% of program needs, and implement a corporate membership program.

**Initiative: 3 (f)** Continue to work with Student Affairs to enhance the student experience and assist in student recruitment and retention.

Continue to operate the student membership program maintaining membership at more than 4,000 students. Continue to operate the Alumni Recruitment Network and Carolina Kids (our recruitment vehicle for the children of legacies). Continue to work with the Career Center to provide services to alumni and to engage alumni in career mentoring and advising for students.

**Initiative: 3 (g)** Increase the power and effectiveness of communications to ensure all alumni are treated as insiders and shareholders in the enterprise.

Continue to work with University Publications to publish the *Carolinian* and the Alumni E-News. Explore ways of using electronic communications to be more “green” and to reduce expenses. Conduct surveys jointly with publications to determine the effectiveness of various communication vehicles and the desires of alumni. Continue to enhance the MyCarolina Web site to ensure it is engaging and useful to alumni.

**Initiative: 3 (h)** Continue to provide engaging programs for alumni that educate, offer social networking and provide avenues to support the University. Using the regional resources of the Association, work to prepare for a major fundraising campaign by heightening awareness of, and interest in, the University.

Continue to develop and strengthen alumni clubs in the top twenty demographic areas. Work with volunteers to ensure that a variety of engaging programs are provided for alumni throughout the country. Collaborate with the Schools and Colleges, with Athletics and with Student Affairs to provide signature programs both on campus and regionally.

**Initiative: 3 (i)** As resources permit, continue to provide direct support in the form of scholarships to the institution’s finest prospective students.

Evaluate ongoing commitments and funding sources to determine the number of alumni, Legacy and Greener scholarships to award. Work with Admissions to select the recipients of these awards.
Goal 4. Refine and improve administrative programs and processes with respect to operational services for internal and external stakeholders.

**Initiative: 4 (a)** Advance institutional promotional opportunities, to encourage constituents’ heightened information, involvement and commitment.

Maximize opportunities to establish effective communication between the University President and alumni, non-alumni friends, donors and prospective donors, business and community leaders, etc. by way of special events, civic club addresses, University Associates, personal contacts, etc.

**Initiative: 4 (b)** Convert shadow databases into Millennium.

Access USC Upstate and School of Medicine data. Prepare crosswalk for such data and implement conversion. Train staff to enter transactions directly into Millennium.

**Initiative: 4 (c)** Upgrade Millennium software to provide staff with the latest functionality.

Load new software and test security, exports, extracts for standard reports and gift processing/prospect management functions. Develop training materials and conduct training sessions.

**Initiative: 4 (d)** Advancement Research will increase by 10% the number of identified major gift prospects.

Mine Millennium data and utilize subscription services and free services to obtain useful information on donors and prospective donors.

**Initiative: 4 (e)** Promote and coordinate special events that reflect and support the University’s mission.

By establishing best practices guidelines and maximizing all University resources within the Advancement Services Division, the office will be better equipped to support expanding needs especially during tight economic times.
**Initiative: 4 (f)** Support the President's House through the transition to the new administration.

Support the First Family in their endeavors as they establish their own imprint for the residence and entertaining. Identify necessary House projects/upgrades and needs that may be supported by in-kind gifts.

**Initiative: 4 (g)** Establish sustainable, eco-friendly practices and methods for implementation at the President’s House and special events.

A mission statement and guide for best sustainable practices will assist this endeavor.

**Initiative: 4 (h)** Improve communication with University donors, particularly Horseshoe Society members, to increase involvement and commitment.

Implement visual recognition plan for major donors and gift naming opportunities. Maximize electronic communication opportunities.
II. Resources

A. Regarding financial resources, University Advancement’s Fall and Spring reviews provided by the Budget Office and the University Advancement Strategic Plan and Budget spreadsheet follow.

B. Regarding space needs, University Advancement’s Projected Space Needs through 2010 survey response follows.
### Projected Space Needs through FY 2010

<table>
<thead>
<tr>
<th>Type of Space (Office, Lab, etc.)</th>
<th>Department</th>
<th>Occupant*</th>
<th>Square Footage</th>
<th>Additional Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office, meeting space</td>
<td>Alumni Association</td>
<td>staff</td>
<td>n/a</td>
<td>If necessary, the Alum. Assoc. will once again have to shrink cube sizes if staff needs change during the next two fiscal years.</td>
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<tr>
<td>&amp; storage space</td>
<td></td>
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<tr>
<td>Office &amp; storage space</td>
<td>Advancement Administration</td>
<td>staff</td>
<td>n/a</td>
<td>No new projects are planned at this time.</td>
</tr>
<tr>
<td>Office</td>
<td>University Development</td>
<td>staff</td>
<td>n/a</td>
<td>No new projects are planned at this time.</td>
</tr>
<tr>
<td>Office</td>
<td>VP-University Advancement</td>
<td>staff</td>
<td>n/a</td>
<td>No new projects are planned at this time.</td>
</tr>
<tr>
<td>Office</td>
<td>Special Events</td>
<td>staff</td>
<td>n/a</td>
<td>No new projects are planned at this time.</td>
</tr>
</tbody>
</table>

*Faculty, staff, graduate or undergraduate student assistant

<table>
<thead>
<tr>
<th>Type of Space (Office, Lab, etc.)</th>
<th>Department</th>
<th>Occupant*</th>
<th>Square Footage</th>
<th>Additional Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office, meeting space</td>
<td>Marketing &amp; Communications</td>
<td>staff and students</td>
<td>TBD</td>
<td>With at least 2 positions coming on board in next few months, Communications &amp; Marketing will need to accommodate those positions in existing structure at S20 Sumter. Funding will need to be allocated next FY to address a redesign on whatever scale. New cubes, some reconfiguring and redesign will be essential to make it work. Strategically on a number of fronts</td>
</tr>
<tr>
<td>Type of Space (Office, Lab, etc.)</td>
<td>Department</td>
<td>Occupant*</td>
<td>Square Footage</td>
<td>Additional Comments</td>
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<td>and in lieu of the alumni center</td>
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<td>being built anytime soon, it is</td>
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<td>important that we explore ways</td>
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<td>to bring all of our areas under one</td>
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<td>roof while remaining in the heart</td>
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<td>of campus. Future planning for</td>
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<td>needed positions to be competitive</td>
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<td>will be undertaken-supporting the</td>
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<td>University's mission should not be</td>
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<td>hampered by lack of space.</td>
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</tbody>
</table>

Division of University Advancement * Blueprint for Service Excellence * FY 2009-2010
<table>
<thead>
<tr>
<th>Type of Space (Office, Lab, etc.)</th>
<th>Department</th>
<th>Occupant*</th>
<th>Square Footage</th>
<th>Additional Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office, meeting space &amp; storage space</td>
<td>Alumni Association</td>
<td>staff</td>
<td>TBD</td>
<td>The Alumni Assoc. plans to build an alumni center which will house the alumni staff and and much of the other University Advancement staff. This will free substantial space for the University both at 1600 Hampton Street Annex and 1600 Hampton Street.</td>
</tr>
<tr>
<td>Office, conference room &amp; storage space</td>
<td>Advancement Administration</td>
<td>staff</td>
<td>TBD</td>
<td>Our operations will move to the new Alumni Center.</td>
</tr>
<tr>
<td>Office, conference room &amp; storage space</td>
<td>University Development</td>
<td>staff</td>
<td>TBD</td>
<td>Our operations will move to the new Alumni Center.</td>
</tr>
<tr>
<td>Office</td>
<td>VP-University Advancement</td>
<td>staff</td>
<td>n/a</td>
<td>No projects planned beyond 2009.</td>
</tr>
<tr>
<td>Office</td>
<td>Special Events</td>
<td>staff</td>
<td>n/a</td>
<td>No projects planned beyond 2009.</td>
</tr>
<tr>
<td>Office, meeting space &amp; storage space</td>
<td>Marketing &amp; Communications</td>
<td>staff and students</td>
<td>TBD</td>
<td>Long range, the University plans to build an alumni/advancement center.</td>
</tr>
</tbody>
</table>

*Faculty, staff, graduate or undergraduate student assistant
## Renovation or Refurbishment of Existing Space

<table>
<thead>
<tr>
<th>Building #/Name</th>
<th>Department</th>
<th>Type of Space (Office, Lab, etc.)</th>
<th>Nature of Renovation/Uplifting Required</th>
<th>Currently Occupied? Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>(29A) 1600 Hampton St.</td>
<td>Alumni Association</td>
<td>Office, meeting space &amp; storage space</td>
<td>To be fully serviceable, staff should be in adjacent areas. The offices should be easy to locate, be accessible to alumni, and include adequate parking for alumni and other guests. Storage at the current location is completely inadequate for Alumni Assoc. storage needs. There is a leak in one of the offices (Suite 305) that is not repairable due to roofing constraints.</td>
<td>Y</td>
</tr>
<tr>
<td>Annex</td>
<td></td>
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</tr>
<tr>
<td>(29) 1800 Hampton St.</td>
<td>Advancement Administration</td>
<td>Storage space</td>
<td>We are in desperate need of additional storage space.</td>
<td>Y</td>
</tr>
<tr>
<td>(29) 1800 Hampton St.</td>
<td>University Development</td>
<td>n/a</td>
<td>We need no renovation projects at this time.</td>
<td>Y</td>
</tr>
<tr>
<td>(14) Osborne</td>
<td>VP-University Advancement</td>
<td>storage space</td>
<td>We are in need of storage space.</td>
<td>Y</td>
</tr>
<tr>
<td>(88) Currell Annex</td>
<td>Special Events</td>
<td>n/a</td>
<td>We need no renovation projects at this time.</td>
<td>Y</td>
</tr>
<tr>
<td>(5) War Memorial- 920 Sumter Street and</td>
<td>Marketing &amp; Communications</td>
<td>Office, meeting space and storage space</td>
<td>To be fully serviceable in future, staff should be in adjacent areas, grouped by focus area of team... etc.</td>
<td>Y</td>
</tr>
<tr>
<td>(29) 1800 Hampton St.</td>
<td></td>
<td></td>
<td>web/digital communications section would have writers, designers, web page builders together, development communications the same, etc.</td>
<td></td>
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<td></td>
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<td></td>
<td>The offices should be in the heart of campus, close to administration and student center, given the nature of our work. Facilities need to be easy to locate, and include some parking for clients. We also need an auditorium where lectures, events, announcements could take place and where media could have room for satellite trucks and for connecting to network/electric to gather, distribute stories, need fiber optic lines to various parts of facility, and need fully functioning wireless network.</td>
<td></td>
</tr>
<tr>
<td>Building #/Name</td>
<td>Department</td>
<td>Type of Space (Lab, etc.)</td>
<td>Nature of Renovation/Upfitting Required</td>
<td>Currently Occupied? Y/N</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Office</td>
<td>Storage is barely serviceable at both locations at the very least, some redesign, better storage units need to be created.</td>
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<tr>
<td></td>
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<td>920 Sumter has had a heating/cooling/steam regulation problem the last couple of years. Effects of this range from paint and plaster chunks peeling from the walls everywhere, to cracked wood frames, uncomfortable office conditions (65 degrees consistently over 2-3 weeks this summer in one office), to most likely some mold. Ostensibly, this has now been fixed (as of September) but we'll see, if it has, all walls need to primed and painted again.</td>
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</tbody>
</table>
III. Departmental Assessment Plans

Assessment plans from University Development, Marketing and Communications, Carolina Alumni Association, and Advancement Administration follow.
Assessment Plan – University Development

Initiative: 1 (a)

Raise $100 million in production (gifts and new pledges).

Action Plans:

- Solicit gifts from alumni, parents, friends, corporations and foundations.
- Recruit and retain professional staff to maximize fundraising efforts.
- Communicate with and educate professional advisors and directors of development on planned giving through quarterly Techniques newsletter, seminars and targeted mailings.
- Identify three to five foundation prospects for each college/unit and solicit at least one for each college/unit.
- Meet with deans, faculty, and directors of development (DODs) who have relationships with key prospects to help craft fundraising strategy for Top 25 prospects of $1,000,000 and above.
- Raise $4.6 million via all annual giving vehicles: President’s Society, Carolina Circle, Reunion Giving Program, and gifts and pledges secured through the Call Center.
- Increase Family Fund gifts through engagement with high level faculty/staff to encourage all levels of employees to participate.
- Increase volunteer involvement in fundraising at the school and college level.
- Develop Corporate Giving plan through identification of potential university/corporate partnerships and develop strategy for pursuit.
- Hold training sessions for deans, vice presidents and DODs on various aspects of fundraising.
- Finalize campaign timetable and budget.

Indicators:

$100 million raised.
Fill all open positions.
Seminars held and mailings to professional advisors completed.
Raise $10 million in planned gifts.
4 DOD blitzes held.
Three to five foundation prospects identified and solicited per college/unit.
Strategies developed for Top 25 $1 million+ prospects.
$4.2 million raised through annual giving vehicles.
Family Fund participation increases to 44%.
Volunteers used in major solicitations.
Identification and strategies complete for corporate giving.
Training sessions held.
Campaign timetable and budget approved.

Assessment Plan—University Marketing and Communications

Initiative: 2 (a)
Enhance multimedia production capability for Division of University Advancement in order to better motivate audiences and position University as an innovative, progressive institution.

Action Plans:
- Develop video and multimedia productions to support advancement, including donor recognition, presidential speaking events, fundraising, and advertising. If such services are unavailable in-house, contract with leading talent to produce high-end multimedia.
- Update new 30-second institutional spots to run during sports broadcasts, if needed.
- Integrate expanded Web Communications team into planning and possible production of multimedia/Flash features for main Web pages or targeted campaigns.
- Work with Athletics to coordinate consistent multi-media content in sports venues.

Indicators:
Produce 2 general videos (one for Fall and one for Spring) about University progress to be shown during alumni, donor, recruitment and civic group presentations.
Produce 2 development-related videos to recognize/celebrate donors and motivate giving.
Use existing 30-second TV spots for advertising on SC Time Warner Cable System, and explore feasibility for producing additional spot.
Create one multimedia feature for the Web.

Results/Use of Results:
All indicators for 2008-2009 were met and exceeded, except for the general videos—one video was produced. We produced four new 30-second spots for sports broadcasts and web, facilitated creation of video pieces for Annual Giving, expanded creation and use of video on web, co-produced a campus tour video for
Youniversitytv.com, expanded our development of new Flash pieces on web, and increased use of multimedia support for president.

New 30-second spot has been created for Time Warner run—that will begin in Spring 09. New Impact campaign to increase awareness of University impact and need for support was conceived and created, with new videos and web site—in addition to print, speeches—rolling out in March/April 2009. Vast majority of high-end video production work is done working with outside agency, which has increased capabilities.

Initiative: 2 (b)

Provide more avenues for delivering insightful and consistent messages on University initiatives and successes.

Action Plans:

- Working from the media experts list, begin creation of a speakers program culled from a group of faculty, leadership and staff.
- Examine staffing and operations needs to maintain an effective speakers bureau.
- Offices of Alumni, Development, Media Relations, and the University Provost will develop program to identify exceptional public speakers and presenters with coordinated University messages delivered before strategically targeted audiences.
- Create Speakers Bureau Web page as part of new Governmental/Community Relations Web site; link to it from Media Relations site.

Indicators:

PowerPoint template designed and distributed to deans/faculty/staff/leadership and alumni.
Establish parameters of speaker’s bureau and process, which office will direct, and start program.
Launch page in conjunction with Government/Community Relations site update, spring/summer 2008.

Results/Use of Results:

The PowerPoint template has been created and is in use. The Speakers Bureau plan of action has been created and submitted to the Provost’s Office in spring 2008--awaiting feedback/approval/next steps. Government Relations site has been minimally updated—awaiting content feedback from Government Relations office. Related to that, though, marketing and communications increased support
for University advocacy in 2008-2009, by supporting Carolina’s Ideas, Step Up
tours and communications, and communications to legislative community.

**Initiative: 2 (c)**

Strategic enhancement of University Web presence in order to market the University
clearly and dynamically. Research needs and refine Web presence in order to remain
competitive with other universities.

**Action Plans:**

- Conduct survey/focus group research and usability/compatibility testing on
current site and develop new design/content for main pages.
- Propose plan of action based on research.
- Redesign main Web pages to accommodate more dynamic marketing content,
and develop content management database to improve content delivery and
save time.
- Work with enrollment management to integrate pages and coordinate
recruitment messages and content.
- Increase the amount of video available to visitors on the University Web site.
- Further develop virtual campus tour in consultation with Visitor Center.
- Conduct quality search for talent and hire Web designer/page builder.
- Explore with ETV adding Rudy Mancke’s collection of radio Nature Notes
and TV shows to the Web.
- Redesign the current Development Web site under the www.sc.edu/giving
site; organize content for external audiences.
- Reorganize the Advancement Web site after strategic planning to decide what
we want it to accomplish; explore creation of internal blog that serves as a
behind-the-scenes look at what we do, to tease upcoming features and stories,
to promote internships, and generally provide an informal, offbeat source of
information about the Division.
- Create micro-sites for all of the University’s Research Centers of Economic
Excellence.
- Begin planning Web Presence redesign and possible blog of process.
- Research new Luminis CMS product (part of Sungard deal) as well as other
CMS products.
- Establish schedule/guideline for reviewing Web statistics on key pages/sites
(*Chronicle, Inside Higher Ed* ads, Innovista, etc.).

**Indicators:**

Track Web site response. Compare *Chronicle* e-mail ads click-throughs to special
Web site in 2008 to new 2009 campaign including also *Inside Higher Education*
campaign.
Hold focus groups with students and faculty/staff to critique current site and
gauge effectiveness of new sites.
Fill Web designer and Web developer positions.
New Advancement site created fall 2008.
New COEE site created fall 2008.
Work with Web marketing committee to research, review demos on CMS
products, FY 2008-09.
Provide regular updates on Web statistics to interested parties.

Results/Use of Results:

Click-through from ads to our Web site as well as unique visitor information is
now being regularly pulled together. This allows us to explore which content in
the ads has the most interest among audiences nationally. Web
designer/developer positions filled, and web team re-organized to be most
effective. New giving site, as well as CoEE and hydorgen research/conference
sites created—advancement site has not been redone but will be in 2009-2010.
We have increased the presence of video on the web, and for news packages. A
focus group was held with students and staff related to the portal pages redesign.

New sites on sustainability/green, business and industry, and annual giving are in
the works and will be completed in 2009. More support from web
communications this year went to presidential communications—web
sites/databases on the presidential search, selection, and first day, financial crisis,
Investiture, Step Up, Carolina's Ideas, and others developed and executed.

Another major focus in late 2008/2009 has been development of the redesign and
content for the main portal pages/sections of the University. These will begin to
launch in April 2009, with key sections up by May 1, 2009. The major initiative
in 2009-2010 will be beginning the process for a full remaking of the University's
web presence, a process that will take 12-24 months to complete.

Initiative: 2 (d)

Increase exposure of the University and its programs and services via regional and
national news outlets.

Action Plans:

• Increase frequency and number of destinations for Media Relations staff
  members' visits to editors and producers of national news organizations,
  primarily focusing on southern bureaus, and Washington, D.C.
• Develop quantitative ad value measure for print, broadcast and online media coverage.
• Create and cultivate a list of reporters and editors who have cover topics relating to student experience/success, international business, health sciences and alternative energy research.
• Develop relationships with national radio, TV and periodical producers/editors in order to establish a small number of faculty as experts for regular show appearances and columns.
• Increase the number of video news releases produced and sent to broadcast media.

Indicators:

Set baseline for media coverage and circulation/viewerships and/or ad value so that future work can be tracked for effectiveness.
Decide on media tracking service, and commence.
Increased placement of University-related stories in national media outlets, and increased audience for those stories.
Place 6 Op-Eds in state/regional media.
Produce 5 video news releases for distribution, and increase video packages sent to satellite feeds and networks.
Establish one faculty member as regular columnist, and one faculty member as regular guest on national radio or TV program.

Results/Use of Results

The vendor for broadcast media tracking service has been selected and is in use, but no baseline for media coverage and tracking of coverage/ad value established yet. Budget permitting, a more complete media tracking service in 2009-2010 can be implemented which would provide baselines and better tracking of success. Media Relations is submitting a proposal concerning this. Excellent coverage involving our faculty experts and the presidential campaign took place in 2008 because of the advance planning of media and marketing areas. Faculty experts list vetting and featuring on Web site, to media is ongoing. A more robust media relations site is in development and will be released in spring of 2009. We met our Op-Eds placement goal for 2008-2009. Five video news releases were produced for distribution.

As with all of marketing/communications, media relations increased its support of the president’s office this year through strategy, talking points/speech copy, and media relations. This was increased even though our area has been down one key FTE, as the director of communications, Chip McKinney, retired in Nov. 2008.

2009-2010 action plan also involves creating and placing stories on the student living and learning environment, and increasing the stories on student, faculty and staff achievement. An increased emphasis on building relationships with national
media covering areas we have strengths in, as well as increased work advancing stories about donors and philanthropy in 2009-2010 are high priority goals.

Increasing media training workshops from one to two for key faculty is a new indicator.

**Initiative: 2 (e)**

Position Marketing and Communications for strategic and support role in ongoing fundraising efforts, and with potential upcoming capital campaign.

**Action Plans:**

- University Marketing and Communications will develop creative ways – through Web, multimedia pieces, print, speeches, media, advertising – to communicate to current and prospective donors about the critical importance of philanthropy and giving to the University. Strategies and tactics will center on showing the outcomes of giving (students, programs, facilities), why individuals give, increasing the philanthropy “IQ” of faculty, staff, alumni and friends about how essential giving is to the success of the University, and recognizing and thanking donors for their commitment and passion.
- Production and budget requirements to provide various support services for potential capital campaign will be developed.
- Hire a proposal writer/development communications manager to lead production of tailored giving proposals and to also gather news from development officers and leadership, and develop, write, and, at times, pitch to media development – related stories.
- Redesign the current Development Web site under the www.sc.edu/giving site; organize content for external audiences.
- Establish schedule/guideline for reviewing Web statistics on key pages/sites, as requested.
- Begin initial planning for capital campaign Web site.

**Indicators:**

Initiate process to redesign and add content to Give to SC and advancement Web sites.
Increased integration of giving message into multiple mediums.
Evidence of clear, consistent, dynamic marketing materials that evoke emotion and motivate action.
Along with Annual Giving, produce a digital Flash e-giving piece for alumni and friends.
Filled position of development communications manager.
Increased giving from donors, and helping to surpass annual fundraising goal of $100 million.
New Giving/Development site created by fall 2008.
Provide regular updates on Web statistics to interested parties.

Results/Use of Results:

New “Give” Web page/site has been created with a more robust e-form. We have hired the development communications manager and his work has greatly increased the number of and integration of donor stories on the web, in print, and in media, in addition to his creating fundraising case statements and proposals development officers can share with donors. We’ve assisted Annual Giving in producing Flash pieces related to giving and sent to alumni and donors. Our work played a key role in supporting development’s efforts to inform and motivate donors, as the University set an all-time fundraising record, topping $100 million.

We will be increasing our web, multimedia and print presence related to fundraising communications in 2009-2010, and preparing for whenever the public launch of a capital campaign takes place. A new advancement site will be worked on in 2009-2010 and coordinated with the process of a larger web presence remake.

Initiative: 2 (f)

Accelerate and expand state and national advertising/marketing to increase awareness and elevate stature among academic audience, foundations, donors and media, and help recruitment of top students and faculty.

Action Plans:

• Continue refinement, consistent touting of strength area and “great momentum” messages at the University in advertising.
• Market aggressively to key higher education audiences nationally using print/Web and e-mail advertising.
• Continue to align advertising and marketing campaigns with high-caliber, respected media brands such as NPR, The Chronicle of Higher Education, Inside Higher Education, ESPN, and Time Warner, as well as with respected national organizations.
• Integrate messages for state and national academic influencers to tout prestige of academics, student experience and other strength areas.
• Send communications (Breakthrough magazine, President’s Report, When Numbers Matter brochure, national recognition) selectively and strategically to list of presidents, provosts and heads of admissions at national universities in the U.S.
• Explore other print, billboard, and advertising or sponsorships associated with national meetings of key academic/University associations.
• Establish schedule/guideline for reviewing Web statistics on key pages/sites (Chronicle, Inside Higher Ed ads, Innovista, etc.).

Indicators:

Track Web site response and visits. Compare Chronicle e-mail ads click-throughs to special Web site in 2007 to new 2008 campaign including also Inside Higher Education campaign.
Develop metrics for gauging, establishing baselines for increased awareness of the University.
Track movement in national peer assessment ratings.
Conduct follow-up, post-campaign NPR research to gauge any changes in perception.
Provide regular updates on Web statistics to interested parties.

Results/Use of Results:

NPR post-campaign research showed an overall increase in awareness and quality perception. Results have been shared and are being used in planning marketing for upcoming strategic efforts with raising brand identity, informing and motivating key audiences. Web site click-throughs and visits are tracked regularly, but baseline data needs to be more consistently set and tracked. New portal pages redesign and content management system being implemented will help with that. Several message pieces have been developed – such as When Numbers Matter, Snapshot – and – in addition to key publications like Breakthrough - have been sent to academic influencers nationally.

Because of budget cuts, the NPR campaign and momentum could not be continued. The campaign was well received by alumni/donors/faculty and the hope is this can be pursued in some form in 2009-2010 in order to continue to build the University’s identity and quality message nationally.

A new Impact campaign has been conceived and created, rolling out in print ad in early 2009, and continuing through 2009-2010 in interactive media, community/governmental/academic influencer and donor communications. Ads with that theme have been placed in national print and online publications including The Chronicle of Higher Education, Inside Higher Education, The Presidency (ACE), Academe (university faculty), and will be in ACE’s national meeting program.

A new microsite, video vignettes and 30-second spot demonstrating the impact the University has on communities in the state and region will be launched in March/April 2009, and continued in multiple marketing channels. The intent is to
increase understanding of our reach, relevance and impact and why the university and higher education need consistent, stable funding and investment.

**Initiative: 2 (g)**

Develop research-based marketing and branding strategies to define and vividly describe the brand values and position of the University.

**Action Plans:**

- Meet bi-monthly with University-wide marketing committee to communicate marketing direction and plans, foster support and sharing of ideas, reinforce standards and policies regarding use of naming and marks, and printing, and facilitate consistent use of messages and materials.
- Convene smaller work groups when need arises.
- Survey faculty, staff, students, alumni about their views of the brand, how they prefer to receive communications, and what they feel defines the University.
- Continue work to assess, refine and improve University’s naming and marks, and to strengthen visual brand identity.
- Begin planning to improve internal communications at the University.
- Continue Higher Ed Morning Briefing and explore developing a daily or weekly communication via e-mail to improve internal communication.

**Indicators:**

Marketing committee meets six times during year.
Establish sub-committees as needed, such as one for the Web.
Conduct 2 satisfaction and informational brand surveys with internal University community and alumni.
Work with Web marketing sub-committee to research, review demos on CMS products, FY 2008-2009.

**Results/Use of Results:**

Given budget considerations and the increased attention needed with presidential communications and financial crisis communications, the full marketing committee has been communicating mainly digitally, but plans are to meet quarterly as a minimum during 2009-2010. This will help reinforce consistency of message and brand, and strengthen the Web redesign and presence process, as well as donor/alumni communications coordination, system-wide. A Web sub-group has been established.
A major survey with African American alumni was conducted by the marketing/communications office. Findings were shared with admissions, alumni, leadership and Focus Carolina's Diversity Committee in order to better inform and improve minority student, staff and faculty recruitment and retention. Focus groups with students, faculty and staff related to the Web and new ads have been held as well.

**Initiative: 2 (h)**

Increase in-house marketing of four-color printing now available through University Printing Services.

**Action Plans:**

- Market availability of four-color printing capability to all University constituents.

**Indicators:**

University Printing will continue to take on four-color printing jobs traditionally sent to outside vendors, saving time and expense for University clients. The press and the color printing unit will become self supporting.

**Results/Use of Results:**

A year-and-a half after acquiring a new color offset press, University Printing continues to meet its indicators of success by providing high-quality, four-color printing to the campus community. The department now prints most four-color jobs traditionally sent to outside vendors unless specifications, length of run, or scheduling is not compatible. In December 2008, a new Xerox iGen-4 digital color press was purchased to provide new and expanded services for high-speed, short-run color printing. Unfortunately, recent campus budget cuts have resulted in a decrease in printing requests department wide. To offset lagging revenues, the department is holding a number of positions vacant.
Initiative: 2 (i)

Continue crisis communications planning.

Action Plans:

- Have all members complete federal standard for emergency communications training.
- Develop scenarios that detail process for crisis communications support, action, collaboration among areas.
- In media training sessions for University officials, continue element on training them how to respond to media in a crisis.
- Support education and promotion of the University's Emergency Notification System, and sign-up.
- Expand and redesign University Emergency pages on the Web site, planning for different needs and issues.
- Roll out backup options for Home/Emergency Web pages as part of main Web updates, spring/summer 2008; include ability for automated content feed to Blackboard and VIP.
- Ensure that University President, Vice Presidents, and University Police Department Chief know Web options for crisis communication presentation.
- Establishment of basic criteria/scale of crisis as determining factor for different Web options.
- Establish clear phone tree from which information will flow to Web Communications for posting on Home/Emergency pages; create wallet-sized cards with personnel and phone numbers.
- Invite representative from University Police Department to meet with crisis communications committee to facilitate process of information flow.
- Work with University Police Department/ALERT system to pre-define simple messages for various crisis scenarios in order to coordinate consistent "first response" communications across media.

Indicators:

All members of committee will complete basic NIMS communications training by end of 2008.
Scenarios of three disaster/emergencies and plan of action will be drafted.
Contributing communications input to the University Preparedness Committee.
Recommended presentation of crisis communication Web options (via testing server) for President, Vice Presidents, University Police Department.
Creation of crisis criteria/Web options, phone tree (and cards), and predefined "first response" messages, summer 2008.
Invite Chris Wuchenich, Scott Prill or another Police Department officer to crisis
communications committee to discuss progress, needs, coordination, spring 2008.

Results/Use of Results:

A crisis communications plan draft is being completed in March 2009 by the interim director of communications and will be shared with leadership and peer communicators. Final version will be ready by summer of 2009. Emergency information Web sites and protocols have been created.

The Web communications director has been through first level of NIMS crisis training. The Communications Office is assisting IT in testing of the text message emergency system, as well as other tests on campus, and this process of coordination and improvement is ongoing. Media training sessions with faculty/leadership incorporate information and exercises related to responding to media during a crisis.

New Initiatives for 2009-2010, in addition to above

Initiative: 2 (j)

Continue increased support for presidential communications and marketing needs, advancing key University and president’s mission through multiple communication channels.

Action Plans:

- Continue providing strategy, planning, execution of messages in talking points, speeches, media, print/digital advertising, op-eds, community/donor/governmental communications, Web and print communications support to advance the president’s message and plan.
- Survey internal and external University community re: perceptions of how well and often the president is communicating with them.
- Examine additional opportunities for positioning the president nationally and globally.

Indicators:

Placement of four op-eds from the President in media in 2009-2010. Develop and execute internal/external University community survey to gauge satisfaction levels with communications from the president, and preferences for communications.
Expand content for office of the president Web site. 
Include president in select, key marketing pieces such as the University Impact on 
Health Care video vignette, and the Sustainability/Green and Business/Industry 
Web sites.

**Initiative: 2 (k)**

Continue increased marketing/communications support for colleges and schools. While 
this has expanded the demand and traditional role of University marketing and 
communications over the past couple of years, it is essential support and must be 
continued and increased, particularly for signature, prominent schools such as business, 
law and medicine.

**Action Plans:**

- Work with business school to support their new marketing efforts in print and 
digital communications.
- Assist medical school with growing their strategic marketing efforts for 
education, research and clinical care entities.
- Strategically include key schools such as business, medicine and law in 
content planning for advertising, Web/print communications, speech copy, 
and interactive, marketing campaigns, and multimedia content creation.
- Demonstrate increased support to deans and leadership for colleges/schools in 
terms of quantity and quality/results.
- Focus philanthropic message and content within communications whenever 
possible.

**Indicators:**

Regular contact, counsel with counterparts in colleges, particularly business, law 
and medicine, in order to leverage marketing efforts. 
Assist School of Medicine in producing *South Carolina Medicine* twice a year 
consistently. 
Assist Moore School in consistent visual and content branding for their new web 
site and materials.
Assessment Plan – Carolina Alumni Association

**Initiative: 3 (a)**

Create a visible symbol of the vital role alumni play in the life of the institution by furthering plans for the Alumni Center. Continue to secure private funds and to seek funding partnerships for the Alumni Center.

**Action Plans:**

- Continue to hold discussions with potential partners both within and outside the University.
- Develop printed and other campaign support materials as above discussions dictate.
- Secure gifts for the Center, make at least two solicitations with the potential for a naming gift for the Center.

**Indicators:**

Gifts and pledges will total $6 million by fiscal year end.

**Results/Use of Results:**

Last year’s action plans were completed including defining the scope and costs of the facility, finalizing the building’s location, creating the space program and cost estimates, acquiring architectural renderings, revising fundraising plans and revising the case statement. Campaign support materials were put on hold. Fundraising continues. In the first two months of 2009, commitments for $300,000 were secured. Discussions about partnerships may yield a public/private partnership that could permit an early start to the project.

**Initiative: 3 (b)**

Conduct Board-level strategic planning aimed at potentially “reinventing” the alumni Association in light of changed revenue expectations.

**Action Plans:**

- Meet with the Executive Committee and all other Board members who choose to participate in structured, facilitated session to review mission, goals, objectives, core values and needs.
Indicators:
The above session shall have taken place with active participation by the Executive committee.

Results/Use of Results:
The resulting plan will be used to shape the Association and its programs for the next several years. The results may cause this plan to be re-evaluated.

Initiative: 3 (c)
Continue “Join Up” campaign, seeking 40,000 total members by December 31, 2010. Increase retention of annual members from 65 percent to 70 percent.

Action Plans:
- Incorporate JOIN UP campaign into electronic and printed communications; create JOIN UP page on CAA Web site; create unique links to measure effectiveness and response rate to communications; incorporate JOIN UP campaigns in call-to-action ads, replacing advertisements for MyCarolina campaign.
- Develop and incorporate systems and processes to more precisely track results of renewal and solicitation campaigns.

Indicators:
Identification and tracking of measurable parameters that positively impact our decision-making capabilities and audience targeting; measureable results in membership as well as evaluation of visits to Web site.

Results/Use of Results:
Growth in membership toward the goal of 40,000 by December 31, 2010. Increase in retention of annual members from 65 percent to 70 percent.

Initiative: 3 (d)
Continue to seek ways to engage in partnership with Development to reinforce the institution’s fundraising objectives and to stress philanthropy in all Association activities and programs.
Action Plans:

- Use member/donor research to identify and target groups and develop strategies for member and donor recruitment.
- Work through the geographically diverse alumni club network to raise awareness of the University’s fundraising goals and to create a receptive and informed alumni constituency; this may include specific alumni events or meetings as well as targeted communications.
- Continue to develop the national young alumni group to assist in engaging younger alumni and stressing philanthropy.
- Continue to seek reunion class and senior class gifts.
- Continue to seek gifts for the Association’s priorities including scholarships and the Alumni Center.

Indicators:

The current data (last studied approximately 12 months ago) are as follows:

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>Percent</th>
<th>Dues Paid*</th>
<th>Total Gifts</th>
<th>Average Gift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donors</td>
<td>5,159</td>
<td>23.1%</td>
<td>$106,874</td>
<td>$8,137,336</td>
<td>$1,564</td>
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<tr>
<td>Non-donors</td>
<td>17,183</td>
<td>76.9%</td>
<td>361,653</td>
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<tr>
<td>Sub-Total</td>
<td>22,352</td>
<td>100.0%</td>
<td>$468,527</td>
<td>$8,137,336</td>
<td>$1,574</td>
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<tr>
<td>Non-members</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donors</td>
<td>6,065</td>
<td>2.9%</td>
<td>$2,342,692</td>
<td></td>
<td>$386</td>
</tr>
<tr>
<td>Non-donors</td>
<td>206,463</td>
<td>97.1%</td>
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<td>$385</td>
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<tr>
<td>Sub-Total</td>
<td>212,528</td>
<td>100.0%</td>
<td>$2,342,692</td>
<td></td>
<td>$385</td>
</tr>
</tbody>
</table>

The goal is to convert non-donors to donors (by 5%) and non-member donors to members (by 10%), resulting in substantially increased membership and gift revenue.

Results/Use of Results:

Efforts in this area should result in increased giving both for Association priorities and overall.
**Initiative: 3 (e)**

Maximize partnership opportunities with vendors and affinity relationships to increase resources available for association priorities.

**Action Plans:**

- Cultivate and support existing affinity relationship.
- Investigate new opportunities for vendor and affinity relationship.
- Increase local business activity in sponsorships and partnerships to attract nonmembers in the Midlands and ensure more benefits for alumni of different demographics.
- Ensure that advertisers are secured for all issues of *Carolinian*.
- Secure sufficient sponsorship revenue to trade for services to underwrite at least 25% of program expense.
- Implement a corporate membership program.
- Continuously evaluate vendor and relationship for marketing and communication effectiveness.

**Indicators:**

Revenue will be maintained at current levels or increased. Vendor costs will be reduced.

**Results/Use of Results:**

Increased revenues combined with reduced costs—together with a focus on member-valued relationships—will enhance efforts to increase membership and provide additional working capital.

**Initiative: 3 (f)**

Continue to work with Student Affairs to enhance the student experience and assist in student recruitment and retention.

**Action Plans:**

- Continue to maintain and grow the student membership program, providing value to students throughout their years at Carolina.
- Continue to sponsor the Garnet Circle Student Alumni Council and the Alumni Scholars Association to promote leadership and alumni networking opportunities among these talented students.
• Continue to work with Admissions to provide scholarships to gifted students as a recruitment tool and to enlist alumni in the Alumni Recruitment Network; this network extends the reach of the Admissions Office to many schools and locales across the country at virtually no cost to the institution.
• Continue to coordinate the Senior Connection, providing benefits to seniors and assisting them in preparing for graduation.
• Continue to partner with the Registrar and Barnes & Noble to participate in Grad Fare and to offer discounted Association memberships to the purchasers of caps and gowns.
• Continue to offer the Senior Party, a celebration for graduating seniors that showcases many of the University’s services for new graduates.
• Continue to operate the Carolina Kids Program, engaging the children of alumni prior to decision-making about college.

Indicators:

Participation in all above activities shall be maintained or increased.

Results/Use of Results:

Average SAT scores and GPAs of incoming freshmen should continue to increase; student retention should also increase. An increase in the number of alumni volunteers working to recruit students will result in higher alumni satisfaction and reduced costs for Admissions.

Initiative: 3 (g)

Increase the power and effectiveness of communications to ensure all alumni are treated as insiders and shareholders in the enterprise.

Action Plans:

• Continue to work with schools and colleges in cross-promotion on web sites.
• Continue to reach out to schools and colleges and other campuses to assist with distribution of e-blasts including monthly and quarterly e-newsletters, holiday e-cards and special event notices.
• Work with University entities to assist in dissemination of important news about the institution to all alumni.
• Explore new advertising opportunities.
• Launch CAA e-store.
Indicators:

Measure feedback, membership numbers, click-through and open rates for above actions.

Results/Use of Results:

Use these results to better target communications, reduce printing expenses and reach greater numbers of alumni.

Initiative: 3 (b)

Continue to provide engaging programs for alumni that educate, offer social networking and provide avenues to support the University. Using the regional resources of the Association, work to prepare for a major fundraising campaign by heightening awareness of, and interest in, the University.

Action Plans:

- Work with University Development and Schools and Colleges to identify strategic locations for alumni activity.
- Enlist alumni club leaders and other regional volunteers in creating events to showcase University accomplishments and objectives.
- Conduct a series of regional meetings, events and activities.

Indicators:

Over the next several years, well-attended events will have been held in each of the strategically identified locales.
Conduct pre-and post-event surveys to measure interest in, knowledge of, and support for University initiatives in key areas.

Results/Use of Results:

Increased appreciation for the work of the University and its ongoing needs for support will translate into increased giving and greater numbers of members.
Initiative: 3 (i)

As resources permit, continue to provide direct support in the form of scholarships to the institution's finest prospective students.

Action Plans:

- Under the direction of the Board of Governors, identify funds to be directed to the Alumni, Legacy and Greener Scholarships.
- Working with Admissions, award these scholarships to the most deserving students.
- Continue to provide support and direction to the Alumni Scholars Association.

Indicators:

Available dollars will have been awarded.
Existing obligations shall have been met.

Results/Use of Results:

Outstanding students with the choice of multiple excellent universities will have chosen Carolina.
### USC Alumni Center Total Probable Project Cost Summary

Home of the Alumni Association, Advancement and Foundations
12/19/2007 DRAFT

<table>
<thead>
<tr>
<th>Construction and Soft Costs</th>
<th>Rounded Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Construction Cost (From Aiken Cost Control estimate)</td>
<td>$22,225,213</td>
</tr>
<tr>
<td>Sitework (including parking lot w/ decorative screen walls)</td>
<td>$1,301,639</td>
</tr>
<tr>
<td>Offsite Utilities Allowance</td>
<td>$500,000</td>
</tr>
<tr>
<td>Voice/Data Infrastructure (UTS) Allowance</td>
<td>$350,000</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>$24,376,852</strong></td>
</tr>
<tr>
<td>Design Contingency (10%)</td>
<td>$2,437,685</td>
</tr>
<tr>
<td>Construction Contingency (5%)</td>
<td>$1,218,843</td>
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<tr>
<td><strong>Total Construction Costs</strong></td>
<td><strong>$28,033,380</strong></td>
</tr>
<tr>
<td>Audio Visual Allowance</td>
<td>$4,500,000</td>
</tr>
<tr>
<td>Voice/Data Phone System (UTS) Allowance</td>
<td>$1,600,000</td>
</tr>
<tr>
<td>Security (Access Control/CCTV) Allowance</td>
<td>$400,000</td>
</tr>
<tr>
<td>Furnishings/Signage Allowance</td>
<td>$3,250,000</td>
</tr>
<tr>
<td>Professional Fees (Including commissioning), Permitting, Testing and Miscellaneous Soft Costs at 15% of construction cost</td>
<td>$4,205,007</td>
</tr>
<tr>
<td><strong>Subtotal Soft Costs</strong></td>
<td><strong>$12,515,007</strong></td>
</tr>
<tr>
<td><strong>GRAND TOTAL Project Cost in 2008 Dollars</strong></td>
<td><strong>$40,548,387</strong></td>
</tr>
</tbody>
</table>

The above construction costs are based on a competitive bid climate with 4-5 bidders. If bidder participation is less, construction costs will likely increase as indicated below in 2008 dollars:

- **Non-competitive Bid Factor [3 Bidders] 10%** $30,936,718
- **Non-competitive Bid Factor [1 Bidder] 25%** $35,041,725

Construction escalation is currently estimated at 4-5% per year. The above estimates are based on a construction start in the second half of 2008. Given the uncertainty of the construction start, the following is provided:

- **Total Project Cost Construction Start 2009** $42,575,806 $42,576,000
- **Total Project Cost Construction Start 2010** $44,603,225 $44,604,000
- **Total Project Cost Construction Start 2011** $46,630,645 $46,631,000

**Expansion Space Alternate -** 2nd Floor North (Pendleton St.) Wing w/approx. 6500 sf of shell space $1,235,000 preliminarily

Not included moving expenses or owner's project management cost if Alumni Center pursued as a private project

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The **Boudreaux** Group

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Division of University Advancement * Blueprint for Service Excellence * FY 2009-2010
Assessment Plan – Advancement Administration

Initiative: 4 (a)

Advance institutional promotional opportunities, particularly once the new University President assumes office, to encourage constituents’ heightened information, involvement and commitment.

Action Plans:

• Support and arrange opportunities for new president to interact with University constituencies.
• Contact civic clubs and other organizations across the state to schedule addresses by the University president and other leaders.
• Invite new, targeted prospective members to join University Associates (the University’s “town and gown” support group of Columbia-area business and community leaders).
• Coordinate University Associates meeting programs to showcase institutional leadership, scholarly expertise and innovative activities.

Indicators:

Presidential “meet and greet” opportunities and civic club appearances documented. University Associates membership development and program documented.

Results/Use of Results:

Fifteen Step Up Tours were organized to introduce President Harris Pastides to both in-state and out-of-state constituents. South Carolina sites included Aiken, Union, Rock Hill, Florence/Lake City, Anderson, Greenville, Charleston and Georgetown. Out of state tours included Charlotte, Washington, New York, Augusta and Atlanta.

Rotary Club addresses by President Pastides were particularly effective in thoughtfully engaging business and community leaders in Camden, Sumter, Myrtle Beach, Orangeburg, Columbia, Charleston, Spartanburg, Aiken, Union, Rock Hill, Florence, Anderson, Greenville, North Charleston, Charlotte and Augusta. Scheduled addresses at other civic clubs, Chamber of Commerce meetings, etc. were similarly effective.

With three months remaining in the year, University Associates membership of 430 already surpasses the June 30, 2008 total of 411. Attendance at luncheon
meetings is significantly increased from an average of 136 attendees during 2007 – 2008, to 187 attendees during 2008 – 2009, to date.

**Initiative: 4 (b)**

Convert shadow databases into Millennium.

**Action Plans:**

- Assess data housed in Raiser’s Edge for the Upstate campus.
- Assess data housed in the USC School of Medicine’s Access database.
- Assess data housed in the School of Music’s database.
- Prepare a crosswalk of identified data elements to convert.
- Develop financial and biographical standard reports.
- Complete the data conversion process.
- Train staff to enter financial and biographical transactions directly into Millennium.

**Indicators:**

Analysis of data elements completed. Crosswalk documents are developed and approved by data stewards. Business rules are fully documented and reporting formats developed. Staff is trained according to Gift Processing and Data Entry standards.

**Results:**

In FY09 financial transactions remaining from Gamecock Club’s electronic conversion of data were added to Millennium. Plans were developed and data examined for the USC Upstate’s database conversion. These plans were placed on hold by the Vice Chancellor of Advancement in order to give him time to assess the Upstate’s various programs. Plans are to resume this conversion in Spring 2009.

**Initiative: 4 (c)**

Update Millennium software to provide staff with the latest functionality.

**Action Plans:**

- Load new software for credit card processing to the database.
- Test security permissions groups.
• Test all existing exports (i.e. Financial Edge)
• Test all credit card processes.
• Develop new training materials.
• Conduct training sessions to inform employees of all new enhancements.

Indicators:

SAGE Payment Processing for Millennium successfully tested and installed.

Results:

A system upgrade was completed January 2009. This included the platform as well as the software. All processes were tested prior to the conversion and again after the system was placed in the live environment. All external exports are functioning properly.

Initiative: 4 (d)

Advancement Research will increase the number of identified major gift prospects by 10%.

Action Plans:

• Mine Millennium database and utilize subscription services such as LexisNexis for Development Professionals and Grenzebach Glier and Associates’ DonorScape to obtain information on major gift prospects.
• Obtain and review for accuracy screenings of particular groups, such as Freshman Parents.
• Verify or create ratings for major gift prospects with ratings of $50,000 and above.
• Notify Directors of Development of identified major gift prospects and suggest fundraising strategies.
• Utilize “push” data via subscription and free services (Google, etc.) to supply Development officers with timely and relevant published media on their top prospects.
• Add pertinent biographical information from published media to Millennium.

Indicators:

Track Research statistics of time expenditures per department, administrator, or division.
Track number of Identified Prospect Notifications.
Track number of Millennium Prospect Tracking Row updates.
Track number of published media articles submitted to Development officers.
Results/Use of Results:

During 2006-2007, staff identified prospects with estimated giving potential of $13 to $33 million and updated Millennium records of 4,737 prospects (an average of 395 per month).

During 2007-2008, Research staff identified 210 major gift prospects with ratings of $50,000-$99,999 or above and an estimated giving potential of $36 million to $83 million. Staff updated the Millennium records of 4,915 prospects (an average of 410 per month).

Initiative: 4 (e)

Promote and coordinate special events that reflect and support the University’s mission.

Action Plans:

- Investigate and reevaluate technological resources such as Millennium, FileMaker Pro and other software to better suit our growing data needs and demands.
- Expand use of technology to help showcase appropriate events.
- Update and revise the Special Events web site as needed.
- Evaluate events to determine if objectives are being met and how the events might need to be reinvented.
- As the economic crisis reduces event budgets, conduct a survey of our peer institutions with regard to implementing fees for event attendees.
- Explore calendar options to eliminate multiple bookings and to assist with future planning.
- Continue to serve as consultants to other campus departments and our sister campuses across the state.

Indicators:

The Office of Special Events explores evolving trends within the events industry/profession to maximize the University’s resources. Our knowledge of basic management principles is coupled with our ability to adapt new concepts and produce effective events.

Results/Use of Results:

During 2007-2008, the Office of Special Events was directly responsible for the management and implementation of over 160 events which had total attendance
of approximately 17,500 guests. Approximately 80 of these events, with over 6,000 guests, took place at the President’s House.

Interaction with members of the Millennium support staff resulted in a new data reporting format. Follow-up meetings will focus on revising data reports for maximum efficiency.

Currently, several events are featured on the iTunesU Web site which is available for webcasting/podcasting. We continue to explore this technology and hope to expand its use with future events.

The Special Events Web site was vastly expanded and updated to include planning checklists, general etiquette and protocol information as well as links to other University resources. It launched in June 2008, and revisions continue to be made as needed.

Calendar meetings will be held to review past events and explore ideas for future events. Several events have already been moved to bi-annual status to streamline planning and opportunities.

As we contacted colleges around the country with regard to Investiture/Inauguration plans, we also conducted a preliminary survey of events during the economic crisis and learned that most schools have significantly cut back on major ceremonies, events and galas and entertaining in general. We hope to conduct a more formal survey with emphasis on possible attendee fees, event sponsorship, etc.

We currently have calendar meetings and debriefings with the President’s Office on a weekly basis. While these help with coordination, we need to better coordinate calendars within the Advancement Division and University. Scheduling guidelines and forms might assist with this endeavor and should be explored.

The Special Events staff continues to work with numerous departments across campus on their events and logistical needs. Several of these events were multi-day events that required a variety of resources.

Our outreach to the system campuses also continues. We will go to USC Aiken in April as the First Lady holds a cooking demonstration for their top donors. Dates are also being explored for a similar event at the USC Sumter campus as well. Future plans also call for the evaluation of the traditional University Day football reception and pre-game activities to best maximize this event’s potential.
Initiative: 4 (f)

Support the President's House through the transition to the new administration.

**Action Plans:**

- Identify target areas of the President's House for project work/upgrades.
- Edit and update President's House Web site and brochures as necessary.
- Work with the First Lady to promote her recipes for future publication. Assist with cooking classes as needed.
- Continue annual inventory with Law Enforcement and Safety. Maintain copies of documentation at Office of Special Events and at LE&S offices.
- Work with the new administration to continue to cultivate friends and donors of the University for furniture, rugs and accessories to update third floor guest rooms and other common areas.

**Indicators:**

The combination of current University and historical knowledge, as well as knowledge of current trends and issues in the overall events profession made the presidential transition as seamless as possible. Through advance planning sessions and preparatory work with facilities staff, custodians, movers, etc. we were able to have a complete changeover in the occupancy of the residence in less than 24 hours. Copies of the President's House manual and digital inventory were valuable tools throughout the transition process.

**Results/Use of Results:**

The Special Events staff had numerous advance meetings with various campus entities to ensure a smooth transition of the first families.

The Sorensen belongings were all moved out of the residence by noon on July 31 so that the Pastides' belongings could arrive for occupancy later that same evening. The remainder of the Pastides' belongings arrived the following day.

The President's House Web site was one of the first items to be updated during the Presidential transition. However, changes are constantly being made to add photos from recent events to keep the site current. The brochure is in the process of being revised to include information about the new first family and the expansion of the gardens and the new "greening" practices of the home.

Almost two dozen of the First Lady's recipes have been mass printed with one recipe being prepared/featured at most events. We have assisted with the preparatory plans for about eight cooking classes and will be helping with about eight more during the coming months. We will continue to support the First Lady.
in these efforts as she works on her future cookbook publication scheduled to be released in about 18 months.

New photos and digital inventory will be sent to Law Enforcement & Safety to reflect the recent changes in the residence. While the First Family was trained about security measures within the home, plans are in place to have a “fire drill” later this spring.

We continue to cultivate donors for acquisition of items/furnishings for the President’s House. Meetings with select Development staff need to take place to determine a strategic process for the acquisition of items and to possibly identify future funding sources for other projects as needed.

**Initiative: 4 (g)**

Establish sustainable, eco-friendly practices and methods for use at the President’s House and events.

**Action Plans:**

- Establish and implement a “green” mission statement for the President’s House.
- Conduct energy and lighting audits of the President’s House.
- Conduct a sustainability audit for the Special Events Office.
- Explore the use of rain barrels for irrigating the gardens of the official residence.
- Plant organic vegetable and herb gardens around perimeter of the House gardens.
- Increase number of recycling bins at the residence and begin to compost.
- Explore alternatives for printed materials to save paper, postage, etc.
- Meet with Sodexo Food Services to discuss possibilities of using more fresh, local products.
- Conduct meetings with other campus entities to explore additional “greening” techniques for events.
- Explore sustainable practices used by other colleges and universities.

**Indicators:**

The Special Events staff and the First Lady are working with Michael Koman and the Sustainability Office to examine ways to preserve the integrity of the President’s House for generations to come while not eliminating the traditional elegance and historical presence of the residence. A mission statement and guide for best sustainable practices will assist with this endeavor.
Results/Use of Results:

We have had several meetings with Michael Koman to begin the “greening” process. Plans are underway to meet with a panel of students in late March 2009.

Energy and lighting audits were conducted at the residence in February 2009.

Rain barrels were purchased in March 2009 and due to arrive soon. The gardening staff will work with them to determine best use.

The organic vegetable and herb gardens were planted. As they continue to grow and flourish, plans are underway for more gardens.

A compost bin was purchased for the private area of the residence. Plans are being made to expand the composting process to include waste from all special events at the President’s House.

Meetings were held with Publications and Printing departments to discuss environmental factors. The Discovery Thyme Ladies Luncheon invitation was printed on paper that is made from 100% post consumer and processed chlorine free fiber. We are looking at using this paper more often in the future. In addition, meetings are underway to explore the possibilities of e-invitations, thereby saving on printing and postage costs.

Menus with Sodexho are becoming more “plant-based” focused, thus using more fresh, local ingredients when available. We continue to discuss plans for eliminating mass food waste from events by composting, donating to shelters, etc.

Meetings with other campus entities are underway. In February 2009, we met with Neal Smoak of the McCutchen House to discuss green practices being used at that facility and plans for future sustainable practices.

Plans are being made to conduct a survey of our SEC peer schools and in-state schools to learn more about sustainability practices on those campuses, especially as it relates to the official residence of the university/college president.

Continue to research ways to further green the President’s House.
Initiative: 4 (h)

Improve communication with University donors, particularly Horseshoe Society members, to increase involvement and commitment.

**Action Plans:**

- Implement campus-wide visual recognition plan for major donors and gift naming opportunities on the Columbia campus.
- Develop list of donors for invitations to athletic events with the President, both at home and away; issue invitations and support such events.
- Investigate President hosting Horseshoe Society luncheon during the reunion weekend; coordinate activities with Alumni Association and Special Events.
- Continue to utilize Publications and University Web site to showcase individual donors.
- Explore possibility of using flash video to e-mail members twice a year.
- Recognize new members of the Horseshoe Society throughout the year.
- Utilize letters and e-mails to communicate with donors.

**Indicators:**

Visual donor recognition policy has been established and will be monitored by the Office of Donor Relations.

Guests attending all athletic events documented in Millennium.

Horseshoe Society event to be held if funding continues.

Donor highlights submitted quarterly to Publications for the *Carolinian* as well as for consideration on our Web site.

New members and level changes notified on a quarterly basis through letter from President; member status updated on Millennium and constituent Directors of Development also notified.

Yearly letter or e-mails from the President or First Lady updating donors on happenings at the University.

**Results:**

The implementation of a campus-wide visual recognition plan for major donors and gift naming opportunities on the Columbia campus was completed and implementation has begun with several units – Athletics, Libraries and the Arnold...
School. The first donor recognition plaque is in the final stages of design approval for the Arnold School of Public Health.

During the 2008 football season, invitations to the donors to sit with the President in his Box and Bay was much more strategically planned. The number of million dollar plus donors was twenty-two (22). For the seven home games, all 14 seats in the President’s Box and 22 seats in the President’s Bay were filled.

For the 2008-2009 men’s basketball season, the President attended nine (9) of the nineteen (19) home games. A total of one hundred thirty-two (132) donors and their guests were in attendance for these games – eight (8) of which were million dollar plus donors.

For the 2008-2009 women’s basketball season, Donor Relations received tickets to five (5) home games. Dr. Pastides attended two of the games. Due to the lack of donor interest, two of the dates for the suite were cancelled.

The annual Horseshoe Society luncheon during the reunion week is still a work in progress. The coordination of these activities will continue with the Alumni Association and Special Events for the 2010 weekend. However, plans have been made for a Horseshoe Society luncheon on May 1, 2009, in the garden of the President’s home. Invitations and guest list are currently being planned.

Utilization of Publications and the University Web site to showcase individual donors is ongoing. We continue to work with Annual Giving and Publications to streamline the Development Web site. Donors are now highlighted on the giving Web site at http://www.sc.edu/giving/ and visitors to the Web site are also redirected to the Spotlight Section of the homepage by clicking on Donor Stories. We are also working with Publications to spotlight endowed chairs and professors on the Web site.

Horseshoe Society members have been included in the flash-e-mails sent out by Annual Giving. Since July 1, 2008, 8 flash-e-mails have been sent: 3 thank you videos; 1 address update; 3 news flashes; and 1 e-solicitation.

New members and level changes in the Horseshoe Society are being recognized on a quarterly basis. Since July 1, 2008, forty-five welcome letters from the President have been mailed; 33 new members: 27 Lieber; 2 Pinckney; 1 DeSaussure; and 3 Rutledge. In addition, there were 12 level changes: 4 Pinckney; 1 DeSaussure; and 1 Rutledge.
The following Initiatives with revised results have been retired.

Initiative:

Enhance quality control of Advancement Administration operations to yield improved efficiency and effectiveness.

Action Plans:

- Work closely with the Budget Office to establish and maintain the University Advancement budget.
- Work closely with University Foundations, and academic units to monitor account purposes and balances; implement revisions and transfers as appropriate.
- Review gift naming opportunities, gift agreements and endowment levels; implement revisions as appropriate.

Indicators:

Expanded budget processes implemented and monitored.
University Foundations accounts properly managed and maintained. Gift naming opportunities, policies and lists, gift agreement templates and endowment levels revised as necessary.

Results/Use of Results:

Advancement Administration designed and conducted an e-survey to staff including Directors of Development and Development Administrative Assistants to determine how operations may “maximize quality service to our internal and external customers.” Follow-up focus groups have clarified strengths, weaknesses, opportunities and threats.

Management of the expanded University Advancement A funds budget truly has been a team effort with valuable support from the Office of the Provost and significantly increased communication with the Budget Office.

Quarterly meetings with University Foundations staff have been reinstituted. Such meetings provide opportunities for information exchange on topics including audit findings/recommendations, policies and procedures, gift agreements, gift naming opportunities guidelines, assessments, online contributions, gift processing issues, etc.
**Initiative:**

Complete Phase II of Gamecock Club’s conversion.

**Action Plans:**

- Electronically transfer financial data from the on-line gift portal directly into Millennium.
- Train staff.
- Develop program for pledge billing.

**Indicators:**

All business practices are documented and computer programs developed to electronically pass data between the two systems. Reports are developed to track on-line transactions.

**Results:**

The design and implementation of the Gamecock Club’s on-line portal is complete. Boosters will begin using this portal in March 2009.

**Initiative:**

Explore the functionality of Millennium’s Events World.

**Action Plans:**

- Explore how Advancement could implement the Events module.
- Create events and select constituents to attend the events.
- Track all activities associated with an event.

**Indicators:**

Discussions will be held with the Donor Relations and Special Events staff in order to develop standards for the Events module. An Events pilot group will be established on the Columbia campus with input from the system campuses as well. They will be charged with testing the functionality and creating standards for all future events. Name tags, attendance lists, food choices, table seating and all activities associated with an event will be tested.
Results:

The Events World in Millennium is being developed during FY09 to enhance the fundraising program. All activities associated with an event will be linked, attendance rosters kept and any fees associated with the activities will be tracked and receipted according to the IRS guidelines. Discussions are being held with a group of USC employees to develop best practices for an Event. New procedures are being developed and all staff will be trained on the system's functionality.

Initiative:

Begin outlining the framework for a data warehouse.

Action Plans:

- Explore how a data warehouse would be used to increase the philanthropic support of the University.
- Work with SAGE to develop data elements needed in data warehouse.

Indicators:

Preliminary discussions will be conducted to determine the framework needed for a data warehouse. Determine which data elements may need to be included in the structure.

Results:

This initiative is temporarily placed on hold.