University Advancement
Advancement Committee of the Board of Trustees
November 16, 2011
University Advancement Mission

To increase public understanding of and support for the University of North Carolina at Chapel Hill
University Advancement

Organizational Structure

Chancellor

University Advancement
Vice Chancellor

University Relations
Associate Vice Chancellor

University Development
Senior Associate Vice Chancellor

Government Relations
Directors of State and Federal Relations

- Hybrid structure – Strong Central and Strong Schools/Units
- University Advancement provides overall leadership for Development and University Relations
University Development

- Major Gifts
- Bequests and Estate Gifts
- Annual Fund / Chancellor’s Clubs
- Corporate and Foundation Relations
- Campaign Management
- Women’s and Diversity Committees
- Gift Processing/Tax Receipts
- Development Website & Online Giving
- Research
University Relations

- University-wide Communications
- News Services
- Internal Communications
- unc.edu
- Publications Services
- UNC Creative
- University Events
- Local Relations
- Board of Visitors
- Visitors’ Center
Government Relations

- Advocates for the University with elected officials, legislative staff and government agencies
- Promotes funding and policy priorities
- Advises campus leadership on key issues
- Manages relationships with legislators, members of Congress and their staffs
- Primary contact for legislative requests and inquiries
- Serves as the internal campus resource for legislative issues
State Government Relations

Serve as liaison on state legislative issues, including advocating for UNC-Chapel Hill before the NC General Assembly and advising/informing campus leadership on relevant issues.

- **External:** Members of NC General Assembly, legislative staff, Governor’s office, and other state agencies

- **Internal:** Chancellor and Vice Chancellors, BOT, Deans, Faculty and Staff
2011-2012 NC General Assembly

- 170 Legislators (House and Senate)
- 41 are in their first-term
- New leadership
- UNC Alums: 24 House and 14 Senate
- Key Legislators
UNC Legislative Priorities

- Relationships with leadership and new legislators

- Interim Study Committees:
  - Education and Budget Oversight
  - State-Owned Assets; UNC Healthcare
  - Information Technology flexibility

- 2012-13 Potential Budget Issues/Priorities:
  - Tuition
  - Avoiding additional cuts
  - Flexibility (ex. salaries – faculty and staff)
UNC Messages

- Importance of UNC-Chapel Hill to North Carolina
  - National and international reputation
  - Educating next generation of leaders
  - Value of Research ($700m + brought into NC)
- Public Service and Outreach

- Requirements to remain a top-tier public research institution
  - Great Faculty
  - Economic Stability
  - Flexibility/Ability to Operate Efficiently
  - Top facilities
Kinds of Advocacy

**Grasstops** (Chancellor, BOT, BOV, Deans)
- Legislative visits to Carolina
- One-on-one meetings/contact with legislators
- Active participation in interim legislative committees

**Grassroots** (Tar Heel Network, Alumni, Students, Parents)
- Emails/Letters/Calls
  - Messaging
  - Volume
- Getting grasstops from grassroots
Four Keys to Advocacy

- Personal Relationships

- Responsiveness: Every legislator is equally important

- Succinct and consistent messages
  - Talking Points on Key Issues
  - UNC Legislative Priorities (February/March)

- Understanding Timing
  - Using Grassroots and Grasstops appropriately
Office of Federal Affairs

Coordinates and expands the university's opportunities with federal funding agencies, strengthens the university's contributions to national advisory panels and Congress, and promotes the university's federal policy priorities.
Advancing federal funding for campus priorities
- Student Financial Aid
- Basic Research

Increasing Carolina’s visibility and influence in Washington
- Enhancing Carolina’s connections with legislators and other federal officials
- Managing the university’s federal advisory committee nomination process

Formulating and conveying the university’s positions on issues with the potential to impact Carolina
- Patent Reform
- Financial Aid Eligibility
Political Environment – Federal

Nationally
- Incredibly uncertain
- Joint Deficit Committee deadline is Nov. 23
- Higher education priorities are vulnerable

North Carolina
- U.S. Justice Department recently approved new redistricting maps
- May dramatically change composition of NC Delegation
NC Delegation – Key Members

Senator Richard Burr
- 2nd Term Senator, up for re-election in 2016
- Member of the Health, Education, Labor, and Pensions Committee; the Finance Committee; the Intelligence Committee; and Ranking Member of the Veterans’ Affairs Committee

Representative David Price
- 12th Term Representative
- Ranking Member of House Appropriations Committee for Homeland Security; and House Democracy Assistance Commission

Senator Kay Hagan
- 1st Term Senator
- Member of the Senate Armed Services Committee; the Health, Education, Labor and Pensions Committee; and Small Business and Entrepreneurship Committee

Representative Virginia Foxx
- 4th Term Representative
- Chairwoman of the House Higher Education Subcommittee
Messaging in this Environment

- Stress economic importance of higher education to the state and country
  - Creation of a 21st Century Workforce
  - Importance of basic research

- Emphasize specific efforts implemented on campus to promote innovation
  - Carolina Express License
  - Innovate@Carolina
  - Blackstone Entrepreneurs Network
Modes of Federal Advocacy

Grasstops (Direct)
- Meetings with federal officials and their staff
- Letters from campus leadership to federal officials
- Campus visits (political and career officials)

Coalition Building (Indirect)
- National Associations (agenda formation)
- Alliance formation

Grassroots (Direct and Indirect)
- Emails, letters, and calls from university stakeholders
- Op-eds from campus leadership
Questions?

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Scholarship Fundraising
Advancement Committee of the Board of Trustees
November 16, 2011
Strong Tradition of Student Aid at Carolina

- In 2010-11, over $325 million in student aid was disbursed to 18,604 students
Role of Private Giving in Scholarship Support

• Carolina First Campaign 1999-2007
  ▪ $345.3 million raised for student support
  ▪ 732 Scholarships/fellowships

• Post-Campaign 2008-2011
  ▪ $110.7 million raised for student support
  ▪ 354 Scholarships/fellowships
Undergraduate Scholarship Types

Need
- General Need-Based Scholarships
  - $75,000 to endow
- Carolina Covenant Scholarship
  - $100,000 to endow

Middle-Income
- Advantage Middle-Income Scholarship
  - $100,000 to endow

Merit
- Founders Scholarship
  - $75,000 to endow
- Old Well Scholarship
  - $150,000 to endow
- Carolina Innovation Scholarship
  - $375,000 to endow
- Carolina Scholarship
  - $400,000 to endow
  - Morehead-Cain
  - Robertson
  - Colonel Robinson
  - Johnston

Matching
- Cornerstone Scholarship
  - $150,000 to endow
  - $100,000 donor’s gift + $50,000 match