OPEN SESSION

FOR INFORMATION ONLY
(No formal action is requested at this time)

1. General Alumni Association
   Doug Dibbert, President
   Tom Lambeth, Chair of the GAA Tar Heel Network

2. Bond Campaign Update
   Jennifer Willis, Assistant Dean for Development, UNC School of Government, & Interim Director of Public Affairs

3. Communications Update
   Joel Curran, Vice Chancellor for Communications and Public Affairs

4. Development Update
   David Routh, Vice Chancellor for University Development

*Some of the business to be conducted is authorized by the N.C. Open Meetings Law to be conducted in closed session.

Important Dates for the Committee:
Spring Commencement – Sunday, May 8
Overview of The University of North Carolina General Alumni Association

Presented to the External Relations Committee of The University of North Carolina Board of Trustees
January 27, 2016
Organization

- Nonprofit: Unincorporated association
- Tax-exempt: (501)(c)(3)
- Self-governed

- The Carolina Club
  - Tax-exempt: (501)(c)(7) nonprofit corporation
Self-Governed Alumni Associations

Air Force Academy   Military Academy
California (Berkeley) Naval Academy
Georgia Tech       North Carolina
Illinois           Oklahoma State
Iowa State         Purdue
Kansas             Texas
Kansas State       Texas A&M
Louisiana State    Texas Tech
Maine              Virginia
Michigan
General Alumni Association

Involve and inform Carolina alumni

• Through programs, promote spirit of fellowship and loyalty among alumni and community
• Provide a continuous flow of information on the progress and needs of the University
• Dedicated to the continuing service of the University
• Encourage united alumni support for Carolina's advancement
Our History

- **1843**: John Motley Morehead and friends establish the GAA
- **1912**: First *Alumni Review* published
- **1922**: Daniel L. Grant '21 named first alumni secretary
- **1943**: Association celebrates centennial
- **1952**: GAA creates Alumni Annual Giving
- **1986**: $3.5 million challenge gift from George Watts Hill '22 to fund Alumni Center
- **1989**: Groundbreaking for the George Watts Hill Alumni Center
- **1993**: GAA celebrates sesquicentennial and moves to GWHAC
- **2009**: Debt on the Alumni Center paid in full
- **2012**: Centennial issue of *Carolina Alumni Review* published
Programs
Programs Overview

1,000-plus functions annually with ~40,000 in attendance

17 distinct program areas
Admissions Related

- Alumni Admissions Forum
- Admissions letters sent to every alumni parent whose child applies
- Carolina Clubs Send-Off Receptions
Student Engagement

- 2,800 Student Alumni Association members
- GAA sponsors several student groups: Clef Hangers, Homecoming Committee, Loreleis, Order of the Bell Tower, Senior Class
- Carolina Legacy Pinning, Official UNC Class Ring Program, Hinton James Day Celebration, Move-In Weekend, Senior Week
Young Alumni

• Programs targeted to alumni who graduated no more than 10 years ago
• *The Quad* e-newsletter
Carolina Clubs

- 250+ volunteers who lead 800 events annually
- Clubs reach 66% of alumni
- Social and service: Tar Heel Service Day
Homecoming and Affinity Reunions

- For Tar Heels of all ages: 2,700 attendees in 2015
- Milestone Mixer, Bell Tower Tailgate and Postgame Party
- Affinity reunions encouraged during Homecoming weekend and throughout the year
Black Alumni Reunion and Light on the Hill Society

- Oldest and largest affinity reunion with ~1,300 attending annually
- Light on the Hill Society Scholarship annually provides $18,000+ in merit-based scholarships
Outreach

- Strategic events bring Carolina to alumni where they live
- Notable speakers and venues
- Postseason and special athletic events
Alumni Career Services

- Reaches 1,000 globally through one-on-one and group coaching
- Comprehensive services for those preparing to start, change or advance careers
Family Favorites

- Bell Tower Climb each home football Saturday
- Camp Blue Heaven family weekend
- Family Days at the zoo, aquarium and whitewater center
Clubs Engagement

- Clubs sponsor ~150 enrichment events each year
- 20 Clubs raised more than $76K in scholarship funds in 2014/15 benefiting 51 students
Alumni Education and Travel

• ~40 educational Tar Heel Travel departures each year
• Many feature UNC faculty or University representatives
• 40% repeat travelers
• Closer-to-home programs available through Carolina College for Lifelong Learning
Spring Reunion Weekend

- Averages ~1,000 attendees (45th reunion class and older)
- 95% of attendees would recommend their friends to attend
- Old Students Club Luncheon serves 700+ with alumni from 1930s still attending
- 50th Reunion Class inducted into Old Students Club and lead undergraduates into Kenan Stadium
Membership
Membership: Philosophy

Programs and Activities

Records

Communications

Members - foundation upon which General Alumni Association is built
<table>
<thead>
<tr>
<th>Membership Category</th>
<th>November 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Membership</td>
<td>66,005</td>
</tr>
<tr>
<td>Annual Members</td>
<td>26,762</td>
</tr>
<tr>
<td>Life Members</td>
<td>39,243</td>
</tr>
<tr>
<td>Annual to Life Ratio</td>
<td>41%:59%</td>
</tr>
<tr>
<td>Membership % - all degrees</td>
<td>23.1%</td>
</tr>
<tr>
<td>Membership % - UG degrees</td>
<td>28.5%</td>
</tr>
<tr>
<td>Retention Rate</td>
<td>79.5%</td>
</tr>
</tbody>
</table>
Why Alumni Join the GAA

- Loyalty
- Service to the University
- Benefits
Communications
Circulation

- 66,005 GAA members (as of Nov. 2015)
- ~3,700 UNC faculty and senior staff
- ~2,800 student members (three print issues a year, six digital issues a year)
Web Stats for Oct. 2015

Sessions: 58,859
Users: 44,209
Page Views: 154,631

Most Read
• Join or Renew
• Alumni Directory
• Online Review Archive
• Member Discount Codes
• Carolina Homecoming
• Find Your Trip
UNC Launches Fund Drive to Honor Dean Smith

The program is designed to make college a reality for undergraduates from lower-income families and to let professionals in education and social work pursue advanced degrees.

Teams Will Wear Same Carolina Blue

In partnership with Nike, the athletics department has refreshed its marks and colors and has introduced a new interlocking N.C. primary logo.

Help Select the Next UNC System President

The UNC System Board of Governors is seeking public input as it searches for a successor to UNC System President Thomas Ross ’75 (JD). A survey and information about public sessions planned across N.C. can be found at
Social Media

Facebook: Launched July 2008
52,498 likes (Nov. 2015)
47,445 likes (June 2014)

LinkedIn: Launched July 2008
10,567 members (Nov. 2015)
8,819 members (June 2014)

Instagram: Launched July 2012
6,584 followers (Nov. 2015)
2,051 followers (June 2014)

Twitter: Launched April 2009
10,331 followers (Nov. 2015)
8,447 followers (June 2014)

Pinterest: Launched April 2012
2,028 followers (Nov. 2015)
1,314 followers (June 2014)

Registered Online Community
90,300 (Nov. 2015)
85,371 (June 2014)
"... to further life-long relationships between alumni and the University."
"... to represent in a balanced way our University's combined mission of teaching, research and public service."
"... to interpret for our readers how these elements work together to make our University what it is."

- from Alumni Communications Statement of Purpose
Records/Information Systems
Alumni Records

Manage alumni records activity

- Address, career and name changes
- Marriages, deaths, births, adoptions
- Alumni news from newspaper clipping services, Web and other sources
- Alumni who are "lost" due to bad addresses

Campus hub for alumni records

- DAVIE: Centrally managed system with University Development
- Professional schools support
UNC Alumni by the Numbers

- Alumni (deceased and living): 376,378
- Total living alumni: 308,926
- Address known alumni: 296,365
- Alumni with an email address: 201,368
- Deceased alumni: 67,452
- "Lost" alumni: 10,412
- Non-alumni GAA members: 3,755
- Inactive alumni: 2,149

As of Nov. 1, 2015
Alumni Profile

- 54% of all living, undergraduate alumni have graduated since 1988
- 54% of total living alumni reside in NC
- Female: 52%; Male: 48%
- Top 5 states: NC (167,283); VA (14,793); GA (11,765); FL (10,962); CA (10,753)
- Top 5 NC counties: Wake (31,659); Mecklenburg (19,114); Orange (16,160); Durham (14,406); Guilford (10,512)
Alumni Record Maintenance

On average, over the course of a year,

- Home address changes: 57K
- Name changes: 5.5K
- Business address changes: 4.5K
- "Active" to "deceased" changes: 1.3K
- "Lost" alumni found: 700
Students: past, present and future
Legislative Advocacy

- Tar Heel Network
- Legislative Reception
- Board of Directors
Investment Cycle

Identification
- Records, volunteers

Investment
- GAA members contribute approximately 85% of total donations by alumni.

Information
- Membership
- Communications
- Online services
- Student programs
- Tar Heel Network

Involvement
- Reunions
- Clubs
- Awards
- Alumni Center
- Community service

Interest
- Enrichment
- Tours
- Board of Directors
- Workshops
- Student recruitment
### Donation Analysis

#### 2014

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Donations</th>
<th># of Donors</th>
<th>Avg Donation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nonmembers</td>
<td>$29,125,361</td>
<td>23,204</td>
<td>$1,255.19</td>
</tr>
<tr>
<td>Registered for Online Community</td>
<td>$23,627,494</td>
<td>20,577</td>
<td>$1,148.25</td>
</tr>
<tr>
<td>Alumni</td>
<td>$70,171,007</td>
<td>48,347</td>
<td>$1,451.40</td>
</tr>
<tr>
<td>Out of the Blue subscriber</td>
<td>$68,458,740</td>
<td>31,763</td>
<td>$2,155.30</td>
</tr>
<tr>
<td>All GAA Members (see note below)</td>
<td>$48,089,623</td>
<td>31,081</td>
<td>$1,547.24</td>
</tr>
<tr>
<td>GAA Life Members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total donations</td>
<td>$38,811,092</td>
<td></td>
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</tr>
<tr>
<td># of donors</td>
<td>18,948</td>
<td></td>
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<tr>
<td>Avg donation</td>
<td>$2,048.29</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Past and Present Reunion Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total donations</td>
</tr>
<tr>
<td># of donors</td>
</tr>
<tr>
<td>Avg donation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tour Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total donations</td>
</tr>
<tr>
<td># of donors</td>
</tr>
<tr>
<td>Avg donation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GAA Board Members (current and former)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total donations</td>
</tr>
<tr>
<td># of donors</td>
</tr>
<tr>
<td>Avg donation</td>
</tr>
</tbody>
</table>

**NOTE:** Just as all UNC donors are not UNC alumni, not all GAA members are UNC alumni.
Campus Partnerships

Centers and Institutes
American Indian Center
Carolina Asia Center
Center for Public Service
Center for the Study of the American South

Chancellor's Office
Chancellor's Cabinet
Commencement Committee
University Day Committee

College of Arts & Sciences
Academic Advising Program
Arts & Sciences Foundation
European Study Center in Winston House (London)
Global Education Center (UNC Global)
James M. Johnston Center for Undergraduate Excellence
PlayMakers Repertory Company
Program in the Humanities and Human Values
The Learning Center
UNC Band

Division of Student Affairs
Campus Y
Carolina Union: Carolina Leadership Development, FallFest Committee, Chancellor's Awards Committee
Housing and Residential Education
Granville Towers
Office of Fraternity & Sorority Life and Community Involvement
Office of New Student and Carolina Parent Programs: Convocation Committee, Carolina Summer Reading Program
University Career Services

Offices and Services
Athletics
Academic Technology and Networks
Carolina Dining Services
Communications and Public Affairs
Diversity and Multicultural Affairs: Carolina Latina/o Collaborative
Educational Foundation, Inc. (The Rams Club)
Faculty Governance: Faculty Committee on Awards and Honorary Degrees
Morehead Planetarium and Science Center
Public Safety
Scholarships and Student Aid
Student Accounts and University Receivables
Undergraduate Admissions
University Development: Department of Annual Giving, Office of University Events
University of North Carolina Libraries - North Carolina Collection
University Registrar

Schools
Constituent Alumni Associations
Denistry
Education
Eshelman School of Pharmacy
Gillings School of Global Public Health
Government
Graduate School
Information and Library Science
Journalism and Mass Communication
Kenan-Flagler Business School
Law

Schools (continued)
Medicine
Nursing
Social Work

Student Organizations
Black Student Movement: Harmonyx, Ebony Readers/Onyx Theater, UNC Gospel Choir
Carolina For The Kids Foundation
Carolina Union Activities Board (CUAB)
Heelraisers Student Giving Council
Order of the Golden Fleece
Student Television
TEDxUNC
Yackety Yack

University Miscellaneous
Ackland Art Museum
Air Force ROTC
Army ROTC
Carolina Performing Arts
Morehead Planetarium and Science Center
North Carolina Botanical Garden
Naval ROTC
Tar Heel Sports Properties
UNC Faculty-Staff Recreation Association (The FARM)
UNC Retired Faculty Association
UNC Student Stores: Bulls Head Bookshop
University of North Carolina Press
Reaching the Summit

- Secure Financial Base
- Respected and Engaged Volunteer Board
- Talented, Committed, Collaborative and Professional Staff
- Comprehensive Approach to Service and Engagement (e.g. Alumni Center, records, communications, programs)
- Receptive Campus Colleagues
- Enthusiastic Alumni
- Respected Institution
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Absentee Voting by Mail begins</td>
<td>January 25, 2016</td>
</tr>
<tr>
<td>Voter Registration Deadline for Primary</td>
<td>February 19, 2016</td>
</tr>
<tr>
<td>One-Stop Voting Early Voting Begins</td>
<td>March 3, 2016</td>
</tr>
<tr>
<td>One-Stop Early Voting Ends</td>
<td>March 12, 2016</td>
</tr>
<tr>
<td>UNC-Chapel Hill Spring Break</td>
<td>March 14-18, 2016</td>
</tr>
<tr>
<td><strong>STATEWIDE PRIMARY ELECTION</strong></td>
<td><strong>March 15, 2016</strong></td>
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Activity to Date:

- Connect NC Official Campaign Kickoff
- Remarks to Internal Constituencies
  - UNC Board of Trustees
  - UNC Health Care Board of Trustees
  - UNC Board of Visitors
  - Dean’s Council
  - Communications Council
- Remarks to Volunteer Groups/Civic Organizations
  - Winston Salem Downtown Rotary Club
  - Chapel Hill Carrboro Chamber of Commerce
  - Editorial Board Meeting at Asheville Citizen Times with WCU and UNCA
Activity to Date:

- **Other Promotional Activities**
  - Video presentations at men’s basketball games
  - School of Medicine “Whiteboard” video

- **General Alumni Association**
  - Carolina Alumni Review
  - Out Of the Blue
  - Tar Heel Network
Upcoming Activities:

- **Remarks to Internal Constituencies**
  - UNC Faculty Council
  - UNC Employee Forum
  - UNC Parent’s Council

- **Remarks to Volunteer Groups/Civic Organizations**
  - Chapel Hill Rotary
  - Greensboro Kiwanis
  - Charlotte Rotary
  - High Point Regional Hospital
  - Wilmington Rotary (planned)
  - Additional Editorial Boards (planned)

- **Student Government Activities**
Informational Materials

- [http://carolinabond.unc.edu/](http://carolinabond.unc.edu/)
- [https://www.youtube.com/watch?v=Y2jUCQmAqVk&feature=youtu.be](https://www.youtube.com/watch?v=Y2jUCQmAqVk&feature=youtu.be)
**COMPASS DASHBOARD**

**Nov. - Dec. 2015**

**CONTENT**

- 24 videos
- 58,680 spotlight views

**EVENTS**

- Winter Commencement
- Town Hall

**SOCIAL MEDIA**

- 12,566 new followers
- 3.97% increase

- 2nd largest social media following in the ACC

**MEDIA RELATIONS**

- 92 releases and pitches
- 72 interview requests
- 53 stories placed

**GOVERNMENT RELATIONS**

- Connect NC Bond

**CRISIS RESPONSE**

- Reported gunman
2015 RECAP

CONTENT

Year Over Year
+384% videos
+17.3% spotlight views

SOCIAL MEDIA

Year Over Year
+4.4% Facebook
+74% Twitter
+290% Instagram

MEDIA RELATIONS

225+ releases and pitches
135+ interview requests
385+ responses to queries

EVENTS

DEAN SMITH
GSK
NOBEL PRIZE
COMMENCEMENTS
CRISIS MANAGEMENT

CAROLINA COMPASS
MAN BEHIND THE NOBEL

7,456 video views
106,437 impressions
737 likes, shares and retweets

THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

CAROLINA COMPASS
Development Update
January 27, 2016
Meeting of the UNC-CH Board of Trustees

David S. Routh
Vice Chancellor for Development
Cash Totals

YTD comparison as of 1/25/16

Does not include December grant totals.
New Cash and Commitments Totals

YTD Comparison as of 1/25/16

FY15

FY16

$218,001,382

Eshelman $100M commitment.

$118,001,382

$171,902,944
## The Pipeline

YTD Comparison as of 1/8/16

<table>
<thead>
<tr>
<th></th>
<th>FY15</th>
<th>FY16</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposals</td>
<td>$366,313,373</td>
<td>$399,525,574</td>
<td>8%</td>
</tr>
<tr>
<td>Intents</td>
<td>$469,613,230</td>
<td>$572,048,771</td>
<td>18%</td>
</tr>
<tr>
<td>Total</td>
<td>$835,926,603</td>
<td>$971,574,345</td>
<td>14%</td>
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<table>
<thead>
<tr>
<th></th>
<th>FY15</th>
<th>FY16</th>
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<tbody>
<tr>
<td>YTD</td>
<td>$366,313,373</td>
<td>$399,525,574</td>
</tr>
<tr>
<td>4-Month</td>
<td>$399,525,574</td>
<td>$572,048,771</td>
</tr>
<tr>
<td>6-Month</td>
<td>$469,613,230</td>
<td>$711,664,015</td>
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<tr>
<td>8-Month</td>
<td>$572,048,771</td>
<td>$971,574,345</td>
</tr>
<tr>
<td>FY15 Total</td>
<td>$835,926,603</td>
<td>$971,574,345</td>
</tr>
<tr>
<td>FY16 Total</td>
<td>$971,574,345</td>
<td>$971,574,345</td>
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</table>
TarHeel Tuesday

- Goal: $150,000 and 600 gifts
- The donor goal was met by 1 pm.
- The dollar goal was met by 7:30 pm.
- FY15: $75,305 and 329 gifts

<table>
<thead>
<tr>
<th>Total Dollars</th>
<th>$235,902.64</th>
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<tbody>
<tr>
<td>Total Gifts</td>
<td>1,054</td>
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<tr>
<td>Total Donors</td>
<td>933</td>
</tr>
<tr>
<td>Average Gift</td>
<td>$223.81</td>
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TAR HEEL TUESDAY 12/01/15

1,054 gifts
$235,902.64 dollars raised

Gifts support:

- Student scholarships
- Faculty support
- Program support
- Other resources
Development Update
January 27th, 2016
Meeting of the UNC-CH Board of Trustees

David S. Routh
Vice Chancellor for Development